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About CaseMap Server

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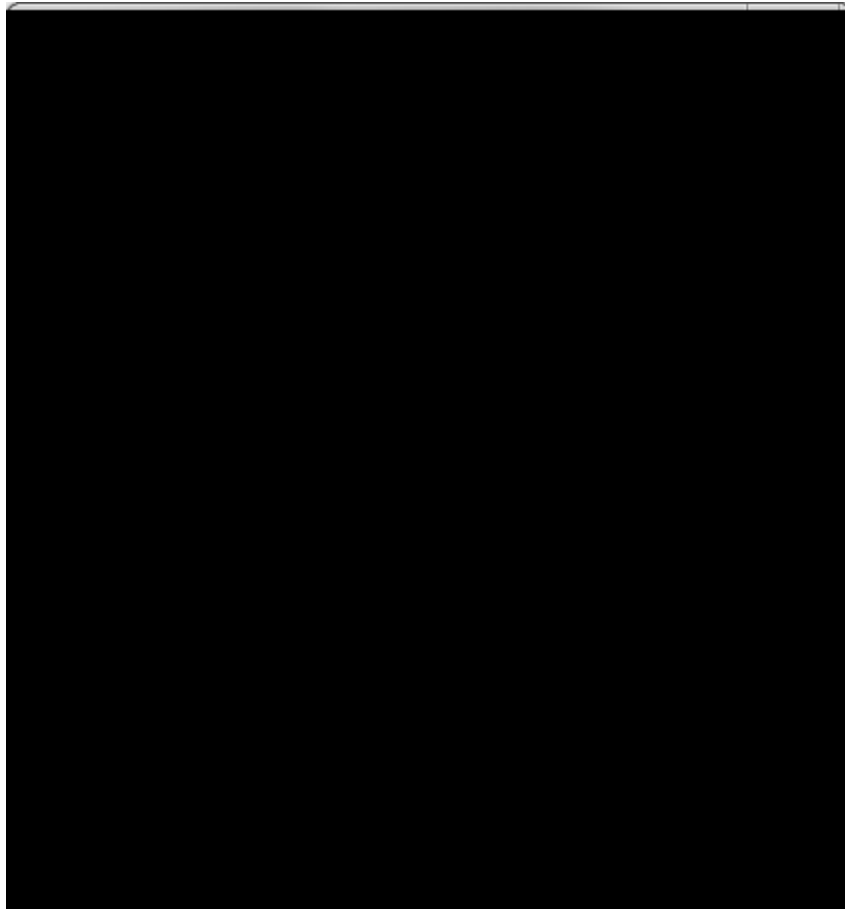
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Managing the CaseMap Admin Console

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4. In the **8YgWJdhcb** field, type in a server description (optional).

Optional: Type in the desktop 5 0 0 pplic5 0 0 tion credentials for the SQL Server client Us Name, Password, and Confirm password fields.

This login needs read, write, and execute permissions for c5 0 0 ses.

9. Click the **HYgh7cbbYVWjcb** button to verify th5 0 0 t you can connect to the server.

You should test the connection for bothe sts of credentials.

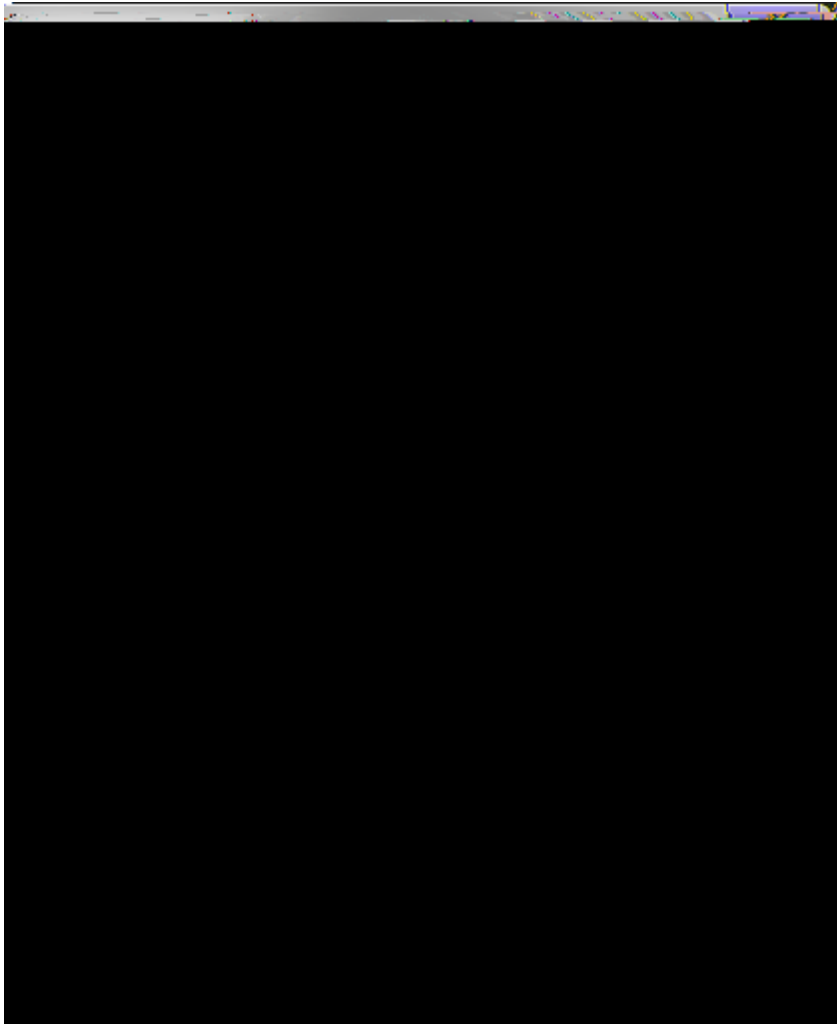
10. In the message box to verify the connection, click **C ?**.


11. Click the **7fYUHY** button to register the SQL Server database.

12. Click the **FYZFYg** button any time you need to update the server list.

13. Click **7`cgY**

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A red dot now displays on the server icon 

Exporting a SQL Server list

 [_Hc`j \]Yk `U`V&a d`YH`~\]gh\]b\[`cZ7UgYA Ud`fc`Y`dYfa \]gg\]cbg](#)

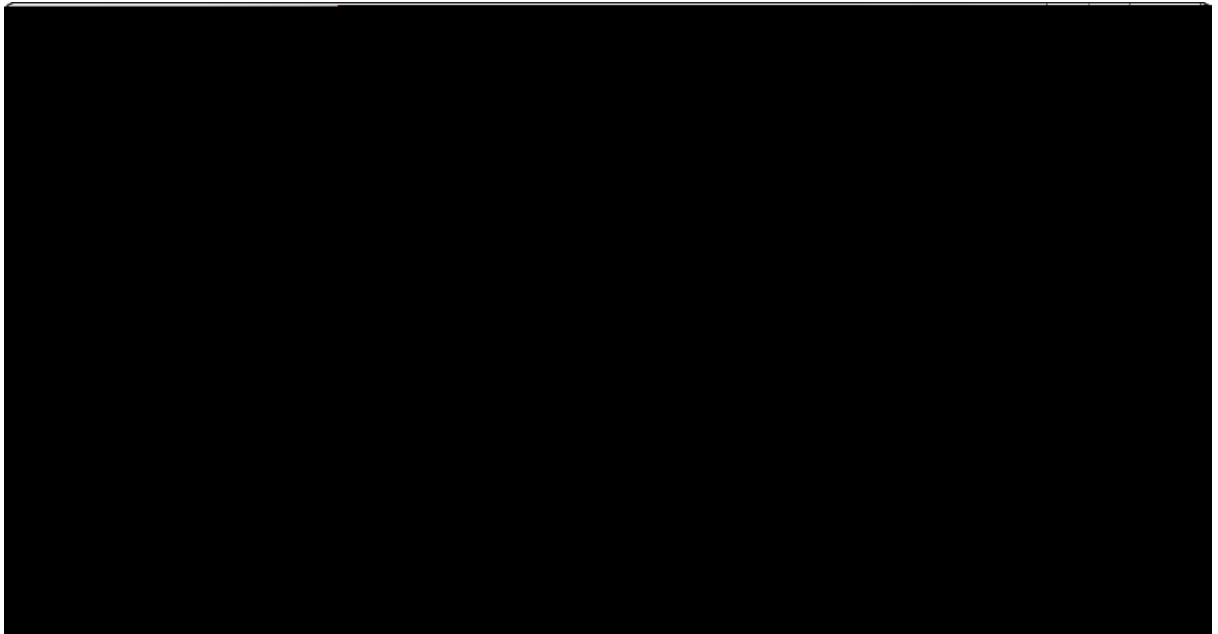


Role Permissions

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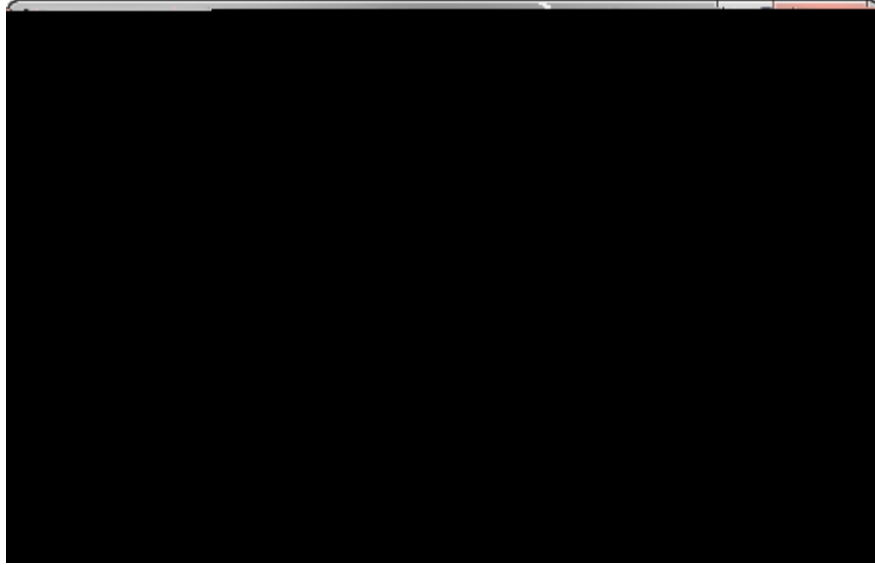


Related Topics





4. In the **5i h Yb h W h c b H n d Y**



5. In the **7c`i a bg**

Related Topics

Related Topics

[About roles and users](#)

[Creating users](#)

[Viewing or modifying user properties](#)

Editing user properties

The User Properties dialog box allows you to assign roles and cases, add a user's email address, disable the account, and set password options.



Disconnecting case users

You can disconnect all case users from a case if you need to perform administrative tasks that require exclusive access to the case, such as deleting or upgrading a case. When you

Click the Select All button to assign the user to all cases.

To elected cases now display in the Cases tab for that user.

To remove a case from the user account, 0()1 select it and then click the Remove button.

7. Click **C?** when you are finished.

Related Topics

[About roles and users](#)

[Creating users](#)

 We recommend you set up CaseMap Server users with assigned roles in the CaseMap

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[Creating users](#)

Managing SQL Cases

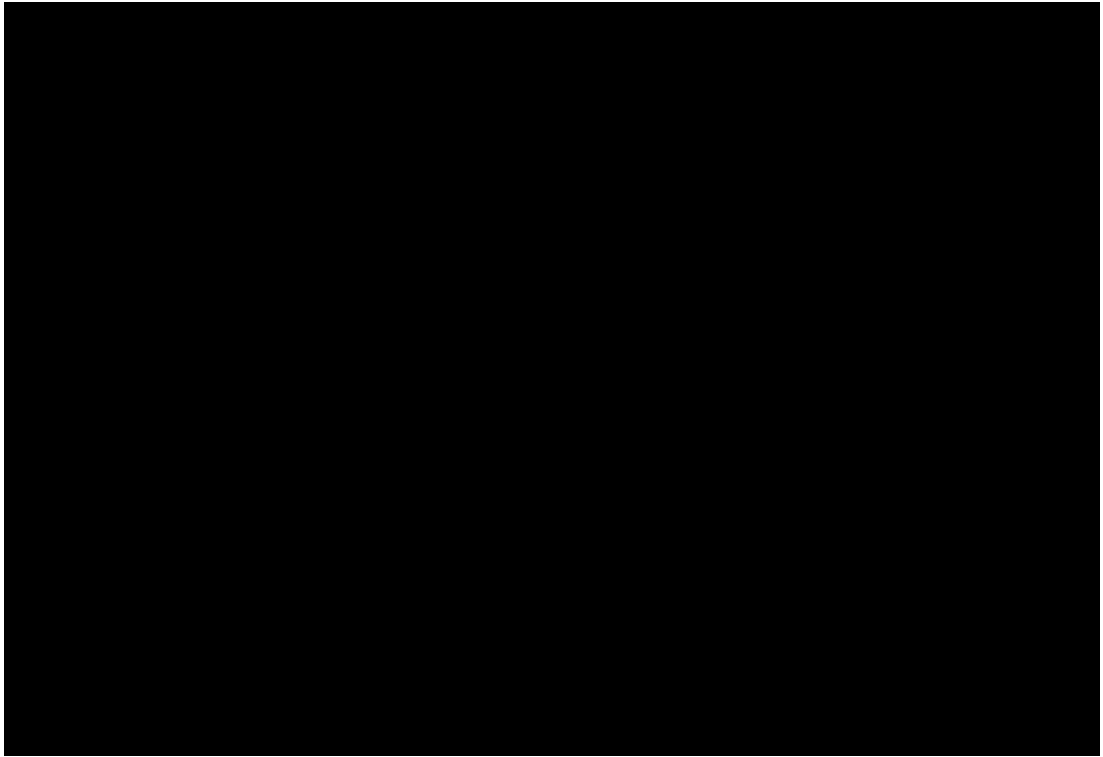
The maximum case name is 100 characters.

Hc'a][fUHY`YI]gh]b[`WlgYgž'gYY.

18. In the **GUJ Y** dialog box, navigate to the folder where you want to save the log file, then click **GUJ Y**.
19. Click the **L** to close the dialog box when you are finished.

Related Topics

[Creating SQL cases](#)



13. To save a results log, click the **GUj Y`@c[** button.
14. In the **GUj Y`a dcfh@c[** dialog box, navigate to the folder where you want to save the log file, then click **GUj Y**.
15. Click the **7`YUf** button if you want to delete import results data.
16. On the **: JY** menu, click **9l]h** when you are finished.

Related Topics

- [Creating new SQL cases](#)
- [Creating SQL cases from CaseMap templates](#)
- [Registering existing SQL cases](#)
- [Mapping users](#)

Cases can also be unregistered. Unregistering a case does not delete the case database file; it simply stops the CaseMap Server from serving it. If you later decide to re-register the case, it

This dialog box is named Register CaseMap SQL Case Database, if you selected CaseMap SQL.

6. In the **7UgY'BUa Y** field, type in the case name.
The maximum case name is 100 characters.
7. In the **7jZ** field, type in the client matter number (optional).
The maximum client matter number is 100 characters.
8. In the **8Z W** field, type in a case description (optional).
The maximum description is 200 characters.
9. In the **GE @GZ j Z** drop-down list, select the SQL Server you want to connect with this case.
10. In the **8UHVUgY'BUa Y** field, type in the exi23(h)-34(e)- /C2_0 129T19(S)17(e)-71(r)10(v)

Mapping users

Mapping users is the process of matching up the users stored in a CaseMap or TextMap case that you are importing or manually registering with the users that are already registered with the CaseMap Server. Mapping a user automatically assigns that user to the case. Users must be assigned to the case in order to open it in CaseMap or TextMap.

When importing a case via the Import Local Cases feature, the Admin Console will attempt to automatically match up the users based on their names or user names (such as their Active Directory user names).

12. In the **SQL Database Name** field, type in the SQL database name.

The maximum SQL database name is 128 characters.

Changing the case server

We recommend that you only edit these values if you have moved or renamed a case database. Changing the SyL Server will not move or rename the SyL case database.

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 [Hc`XYUMj UHY`U`WgY](#)

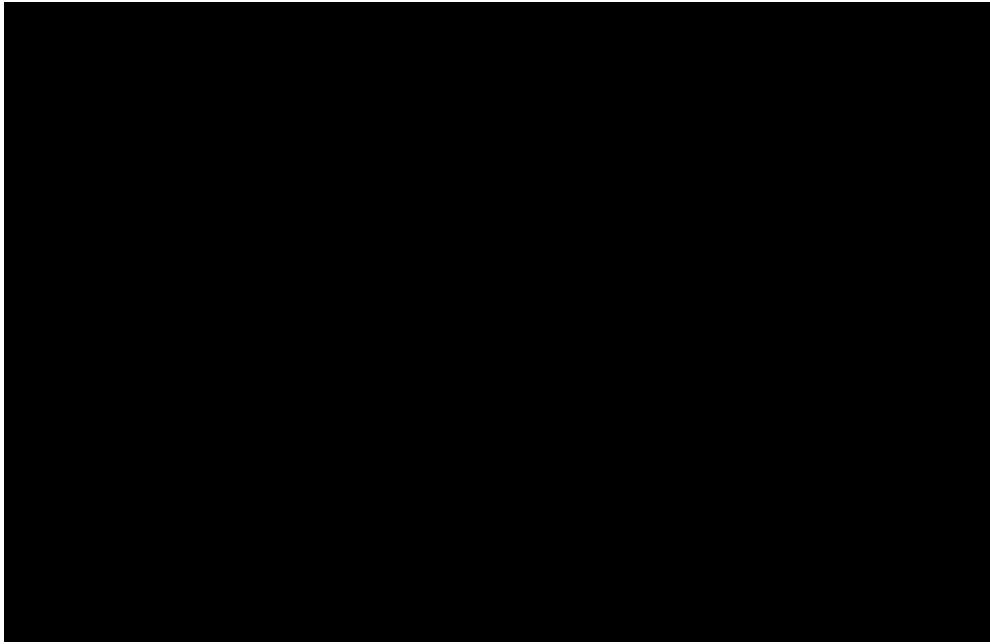
Deleting cases

Delete cases that staff no longer need to access. When a case is deleted, it is no longer registered in the SQL Server database. The SQL Server database itself is not deleted.

We recommend that you email all assigned case users before deleting a case. When you delete a case, any users currently working in the case will not be kicked out. However, they will not be able to log back into the case once they close it.

Adding index locations





4. In the message box, click **MRg**.
5. Click the **6fck gY** button.

[About SQL case indexes](#)

[Adding index locations](#)

[Editing index locations](#)

[Renaming index locations](#)

Synchronization of cases is done only in CaseMap and TextMap. CaseMap replicas can only be synchronized with the master case once. TextMap cases can be synchronized with the master case repeatedly, as needed. If you have multiple remote users that need to work in a replica, create a separate replica for each user. Users can be granted permission in the CaseMap Admin Console to create replicas for both local and SQL cases.

All case replica names (local and SQL versions) must be unique. Creating a replica copy of a CaseMap or TextMap case database is an exclusive process. Case staff cannot access the master case during this process.



