

Installing CaseMap

CaseMap®, Version 14

- Preliminary Planning for CaseMap
- Installing CaseMap

CaseMap Installation Guide

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CaseMap®
DocPreviewer™
DocManager™
CaseMap® Server
TextMap®
TimeMap®
Sanction®

Version: CaseMap® 14
Release Date: January 14, 2019

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Installing CaseMap

Preliminary Planning for CaseMap

About preliminary planning

Preliminary planning for implementing any software application is important for achieving the best set-up results, the first time. We recommend that you take some time to review and plan how your organization will be using CaseMap, especially if you are also installing the CaseMap Server, the CaseMap Admin Console, and the CaseMap SQL Import Utility. Planning ahead helps ensure that administrative tasks are minimized for initial setup and your long-term maintenance of the application and its companion products.

 [Plan before you install CaseMap](#)

Before installing CaseMap and the CaseMap Server, the CaseMap Admin Console, and the CaseMap SQL Import Utility, we recommend you review the following checklist to ensure you have not missed any steps in planning details.

Best Practices: Preliminary Planning

System Requirements / Licensing

Review system requirements and licensing options

Network Directory Setup

Ensure CaseMap users have full network access to case network folders where local cases are stored, or have SQL cases assigned to them in the CaseMap Admin Console

* CaseMap does not support/encourage VPN access to network files, which can cause user access issues unless it is installed on CITRIX. Remote users need a replica copy of the case installed on their hard drive.

Have preset folders for each client/matter

Server Setup and Security

Implement server firewalls

Set up CaseMap security in CaseMap and the CaseMap Admin Console using Windows or simple authentication

*We recommend that you use Windows authentication for SQL cases

Enable security and require logons for all CaseMap cases

Implement password policies

Use private IP via VPN access

Receiving Data and Images

Have a data collection and processing plan in place

Verify that file formats are recognized in CaseMap

Have a directory location with subdirectories in a structure that prepares you for optimal organization of the various cases, image source files, templates, reports, and backups for each

Case File Design

Create local case templates for different types of cases or to retain specific spreadsheet fields and views

* For information on creating SQL case templates, refer to the CaseMap Server documentation.

Implement field name conventions for consistency

Implement short name conventions for consistency

Customize the Intake Interview Jumpstart Form for your organization's needs

Managing Clients/Users

Inform users of training options, immediately

Identify any remote staff that may need access to cases on your network or require replicas of cases

Install native viewer applications for users who need to view documents and files that are linked to case records in CaseMap

Create email templates for clients to use the Intake Interview Jumpstart Form

Create emails for users that include their logon information and pertinent case or software instructions to get them started

Roles and Responsibilities

Ensure users understand the case design and know how they will specifically use CaseMap for analysis

Ensure users understand timelines and processes required for managing CaseMap cases

Clearly define roles and responsibilities among attorneys, paralegals, legal secretaries, litigation support staff, and IT staff, etc.

Implement policies for who can and cannot create/modify case databases, add/delete users/roles, or conduct other sensitive tasks

Reporting

Have a production plan in place for delivering reports and information to third parties

Know what types of reports will be generated by users and how to print them

Security

Apply security to the network folders that contain cases and images to prevent others from viewing privileged content or revealing case strategy

Apply read-only rights to spreadsheet fields to restrict users from adding or changing content

Ongoing Maintenance/Management

Have a dedicated admin machine for the sole purpose of managing CaseMap cases on the CaseMap Server

Schedule maintenance windows to ensure that all users are out of cases

Have a quality control plan in place for administrative tasks like importing/exporting data, synchronizing cases, and performing global edits

Migrating cases

Have a migration path for importing cases from previous CaseMap versions

You should only migrate a case to a CaseMap Server once

* If you experience an issue during the import, you can try migrating the case again.

Each SQL case requires its own SQL database

* For more information, refer to the CaseMap Server documentation.

Backup/Data Recovery

Have a backup schedule in place

Always back up .cmX local cases

Always back up .MDF & .LDF for SQL files

Always back up SQL case databases

Ensure your internal guidelines are in place for backup and data retrieval

Implement archiving and data destruction policies

Updating Considerations

A best practice is to always have the most recent version of CaseMap, and CaseMap Server/CaseMap Admin Console, and the CaseMap SQL Import Utility installed

Ensure that you can update all users accessing a specific case at the same time

Quality Control

Have well-defined checklists/procedures in centrally available location

Ensure that hand-off processes are well-defined

Plan case design and structure in advance

Designing cases is a necessary planning phase that ensures consistency in structure, naming conventions, security, user permissions, etc. The more forethought you apply to designing case templates and user roles for implementing security, the easier it is for you and other administrators to identify any irregularities that may occur.

Consistency is key when it comes to field naming conventions, use of field types, and spreadsheet field placement in CaseMap cases. When field guidelines are established, it is less confusing for users and administrators who are working in multiple cases.

For more information, see [Before creating cases](#) and [About cases](#).

Determine a clear migration path for cases

If you are using CaseMap Server, a migration path for importing cases from previous CaseMap versions is essential. You should only migrate a case to a CaseMap Server case once. If you experience an issue during the import, you can try migrating the case again. Each SQL case requires its own SQL database.

For more information, refer to the [CaseMap Server](#) documentation.

Related Topics

[Before installation](#)

[CaseMap system requirements](#)

Before installation

Review the following information to understand the installation and implementation process. If you did not buy CaseMap Server, you only need to install or upgrade the CaseMap client application.

Installing CaseMap involves the following:

- CaseMap client application installed on local machines
- CaseMap Server (optional, for clients who want to create SQL cases)
- CaseMap Admin Console (optional, for clients who want to create SQL cases)
- CaseMap SQL Import Utility (optional, for clients migrating existing local cases to SQL cases)

Implementing CaseMap with CaseMap Server can involve one or more of the following:

- Configuring SQL Server for CaseMap Server installation
- Creating network folders to store local cases or creating SQL servers and SQL cases in the CaseMap Admin Console
- Applying network folder and field level security for local cases in CaseMap or setting up users, roles, and permissions in the CaseMap Admin Console for SQL cases
- Assigning users to SQL cases in the CaseMap Admin Console
- Creating network folders to store case documents and other related files (audio, graphics, etc.)

Learn how CaseMap licensing works

The licensing options for CaseMap include:

- **Single seat** — A lower cost option for clients
- **Multi-seat** — Allows for installation on both PCs and the application server
- **Enterprise** — Allows for 400+ users and includes discount options

Review the system requirements

Please review the current [system requirements](#) for setup considerations for your processor and RAM. Review each section in advance before making expensive hardware and network decisions that may not be in line with LexisNexis recommendations.

Store local cases on network for staff access

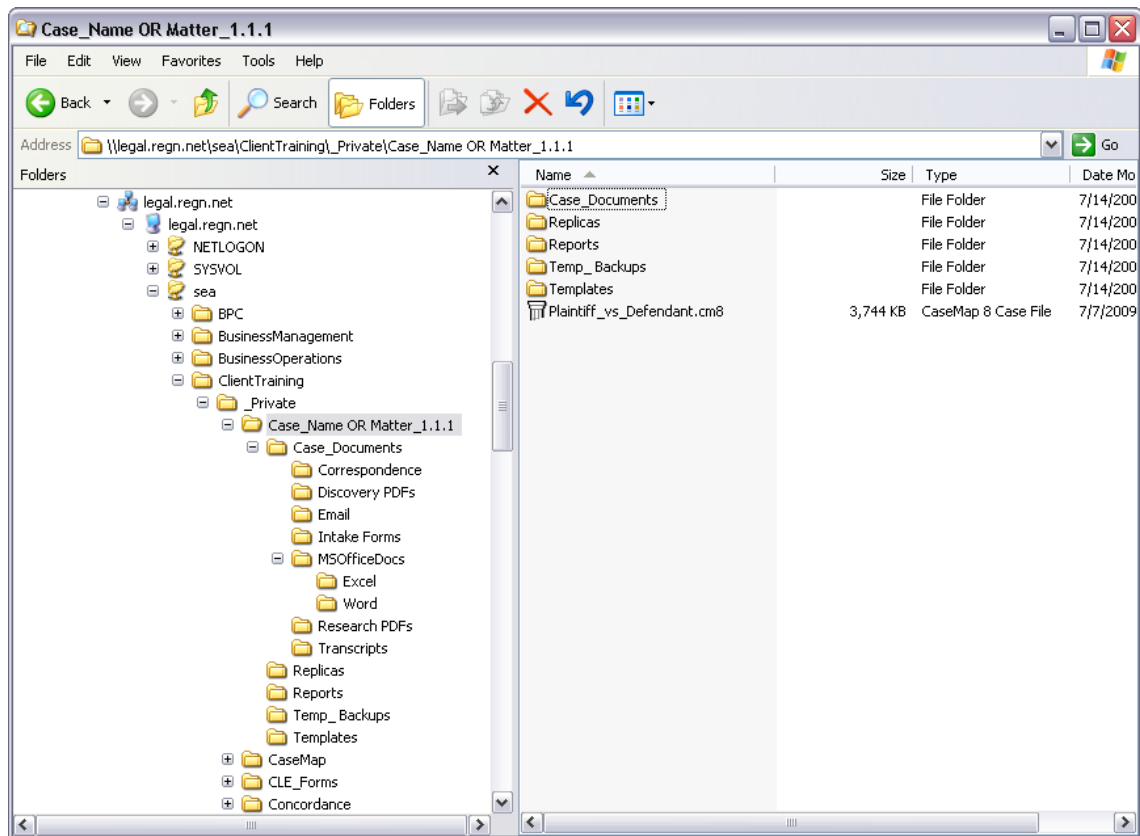
Local cases should be stored on the network where all case users can access the file. Local cases should be stored by case name or matter, or according to your organization's internal guidelines.

If there is no network setup or only one individual is using a case, the case can be stored locally on a user's hard drive. In this instance, nightly back-ups of the case should be made to a flash drive or portable hard drive, or in a network folder. In this scenario, other users cannot access the case without using a replica copy. Synchronizing data with the primary case should then occur regularly.

Use directory folder naming conventions

Most organizations have network directory design guidelines already in place for storing information in a consistent manner. We recommend that you consider our example while you review your own.

The following example reflects folder naming conventions and directory hierarchy for storing cases, documents, replica cases, backup files, etc.



If you are planning to move a local case to a new directory location, and want to ensure that it is still accessible to users, build a directory template structure that is easy to relocate.

Apply folder security to local cases to control access

Local case security is applied by controlling access to cases saved in directory folders on your LAN. Grant folder access to only those users working on a particular case. In this manner, you are preserving case integrity by preventing others from reviewing your case information and strategy.

Set up users and assign cases/roles for access

All users must be added to a case in order to access it within CaseMap or be assigned to a SQL case in the CaseMap Admin Console. Having a CaseMap license does not grant a user permission to open a case.

We also recommend that you require users to set passwords. Users can set and change their passwords at any time. If a user of a local case has forgotten a password, contact CaseMap Support to have it reset. If a user of a SQL case has forgotten a password, he or she should contact their case database administrator.

Determine a clear migration path for cases

If you are using CaseMap Server, a migration path for importing cases from previous CaseMap versions is essential. You should only migrate a case to CaseMap Server once. If you experience an issue during the import, you can try migrating the case again. Each SQL case requires its own SQL database.

For more information, refer to the [CaseMap Server](#) documentation.


Related Topics

- [About preliminary planning](#)
- [CaseMap system requirements](#)

System requirements

Please review the current system requirements for setup considerations and suggestions. Review each section in advance before making expensive hardware and network decisions that may not be in line with LexisNexis CaseMap recommendations.

Please keep informed of CaseMap release updates and how they impact your system by checking our Web site at www.lexisnexis.com/casemap.


-  When setting up users for local cases, ensure that all users have full network access to each case directory they need to access. When setting up users for SQL cases in the CaseMap Admin Console, ensure that users are assigned appropriate roles and assigned to the cases they need to access.


CaseMap Client Application v14.0

CaseMap must be installed and run on a local hard drive. CaseMap cannot be run from a network server. CaseMap data can either be stored in a file on a network drive or in a Microsoft® SQL Server® database. You must be logged on with admin rights to install CaseMap.

- 1 GHz or faster 32-bit (x86) or 64-bit (x64) processor
- 4 GB RAM or greater
- Approximately 1 GB of free disk space on the system drive
- Super VGA (800 x 600) or higher-resolution monitor with 256 colors
- Microsoft Internet Explorer® v6.0+ is required for Send to CaseMap functionality

- Any of the following versions of Microsoft Windows®:
 - Microsoft Windows 2008 Server®
 - Microsoft Windows 2012 Server®
 - Microsoft Windows 2016 Server®
 - Microsoft Windows Vista®
 - Microsoft Windows® 7
 - Microsoft Windows® 8
 - Microsoft Windows® 10
 - Microsoft Office 2016®

 You can install the latest CaseMap client application version to a desktop that already has previous versions of CaseMap installed. It will not remove the prior version.

 When prompted to enter an URL for the CaseMap Server (optional), please enter a URL ending with CMServerClient.svc. CaseMap Server is required to work with SQL cases.

Related Topics

- [About preliminary planning](#)
- [Before installation](#)

Installing CaseMap

Installation and activation

The CaseMap client application is installed to the Microsoft® Windows® desktop of any CaseMap user. If you are using the CaseMap SQL version, the install utility will prompt you to enter the URL to the CaseMap Server. The URL should end with CMServerClient.svc.

CaseMap installs as an unregistered trial copy. There is a 30-day grace period to use CaseMap. Once the grace period expires, CaseMap will no longer function. The unregistered copy of CaseMap works identically to the registered version. If you are reinstalling over a registered version of CaseMap, you will not need to re-register.

CaseMap client installation overview:

- CaseMap must be installed and run on a local hard drive.
- CaseMap may not be run from a network server.
- You must be signed into your computer on with administration rights to install CaseMap.
- CaseMap data files can be stored in a file on a network drive or in a Microsoft® SQL Server® database.

- Cases created with previous versions of CaseMap may require conversion to the current data format before they can be opened in the current version of CaseMap.
- CaseMap DocPreviewer and DocManager are optional plug-ins, which are downloaded with CaseMap and require an additional license for activation.
- CaseMap plug-ins for Microsoft Word and Microsoft Outlook are optional installation components.

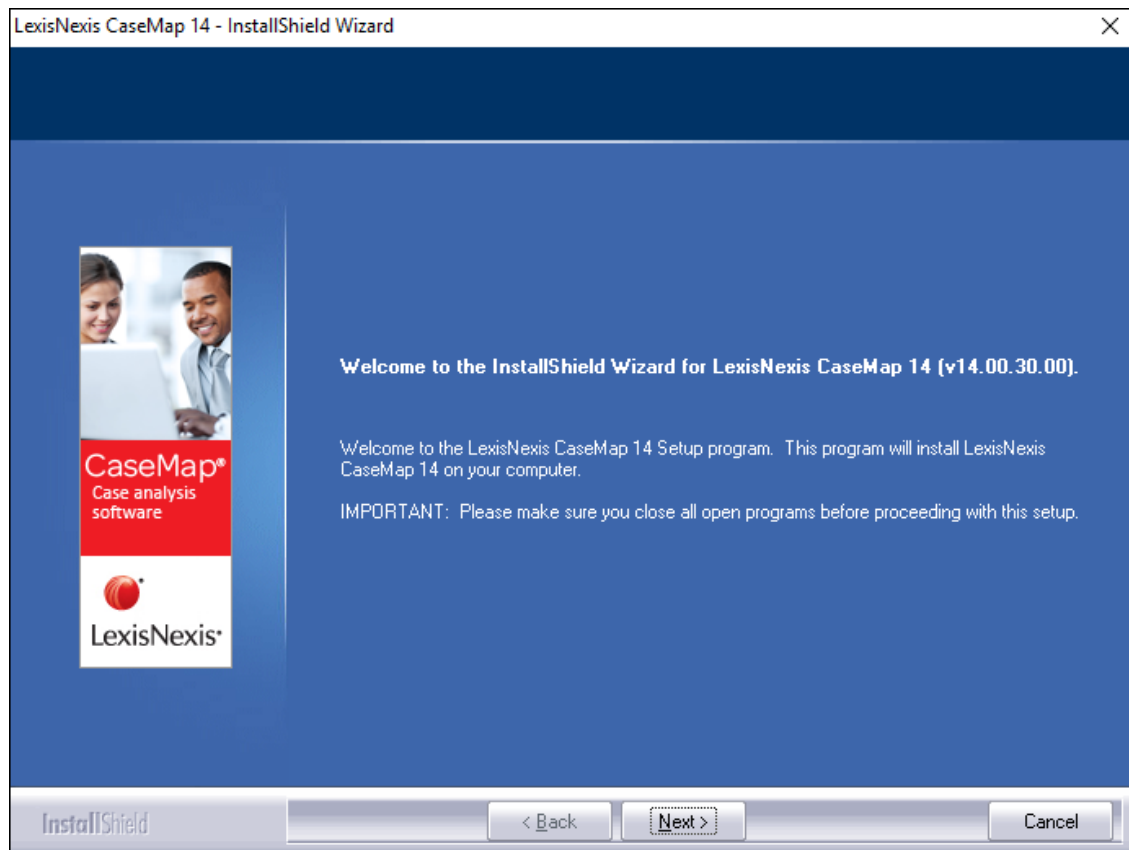
⚠ Cases must be converted to the current version format. After a case is converted, previous CaseMap versions cannot open it. Upgrade each instance of CaseMap that will work on the converted case. For details, see [Converting cases](#).

⚠ Installing a new version of CaseMap replaces any current installation of the Send to CaseMap plug-in for Adobe Acrobat with a new version. The new plug-in may work in earlier versions of CaseMap, though some features may be disabled. We recommend that you do not upgrade to a new version of CaseMap until you are ready to stop using earlier versions of the product and can migrate previous version cases to the current CaseMap version.

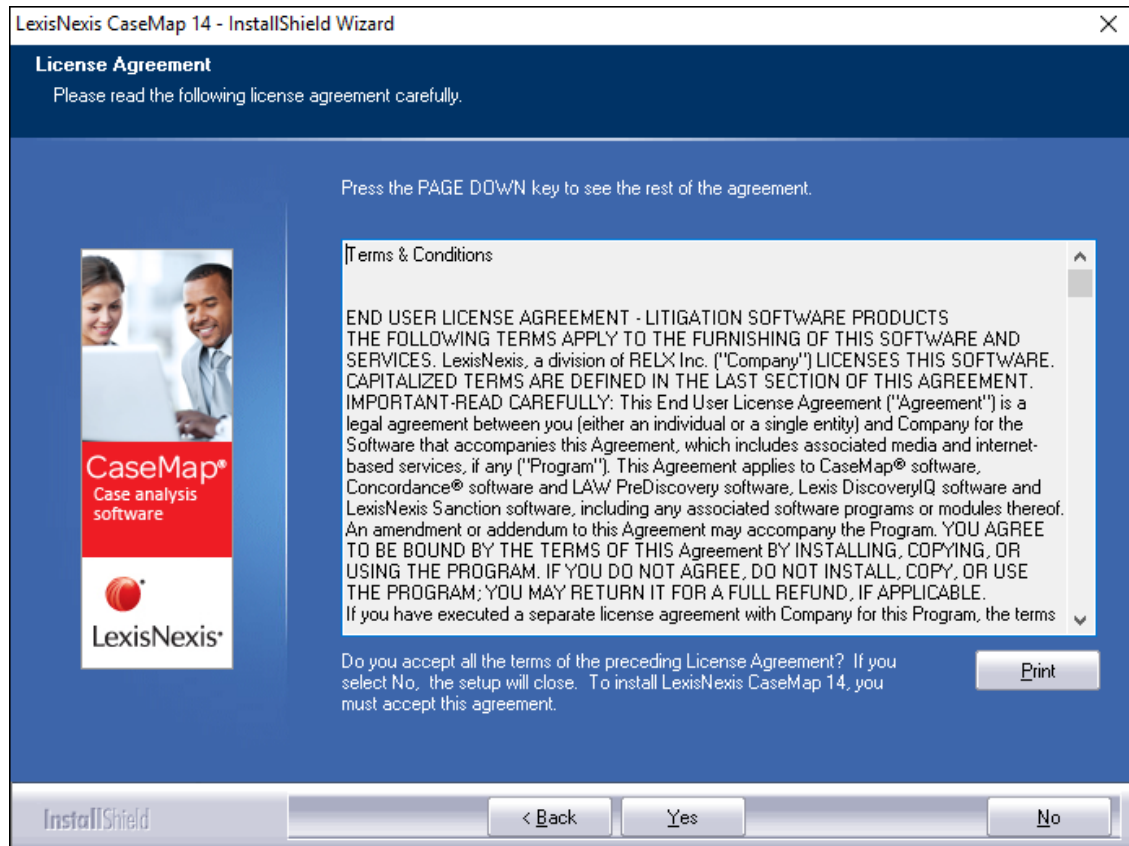
✔ You can install the latest CaseMap client application version to a desktop that already has previous versions of CaseMap installed. It will not remove the prior version.

[To install CaseMap](#)

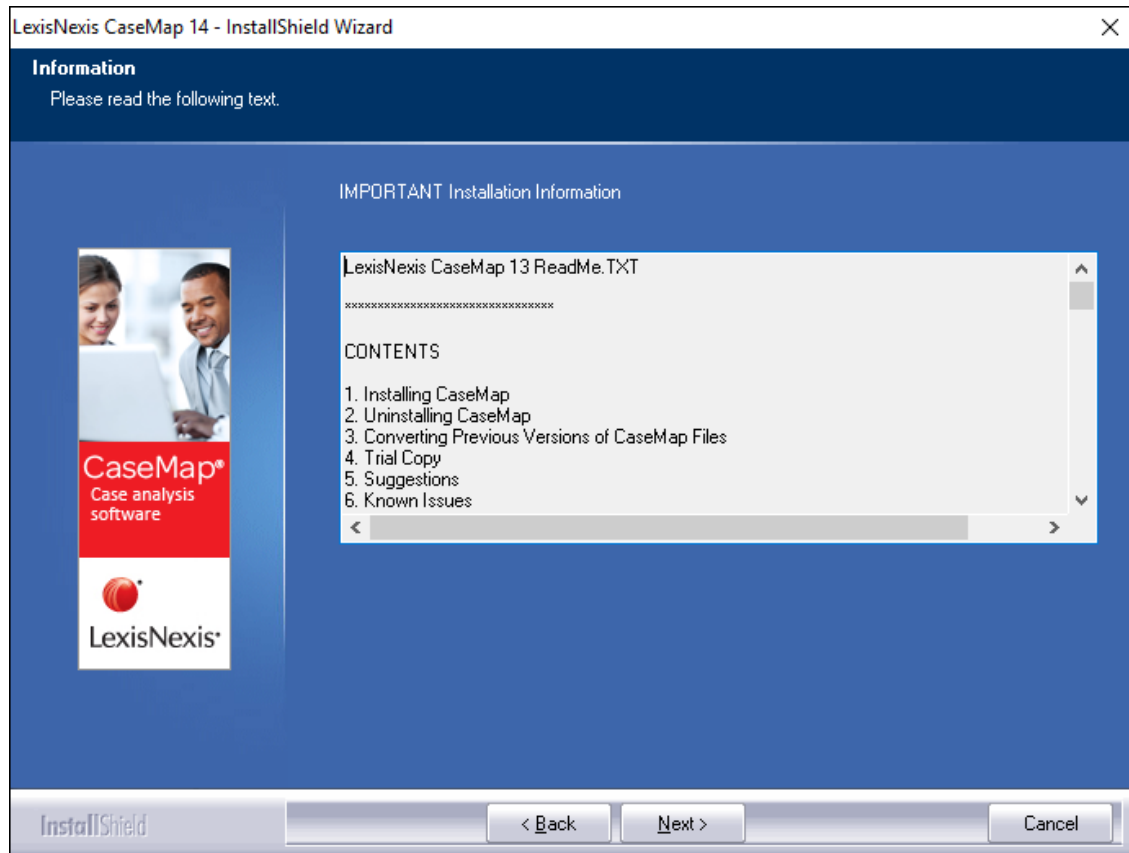
1. Run the **CM14Setup.exe** file.
The CaseMap Install utility starts.
2. When the InstallShield Wizard launches, click **Next**.



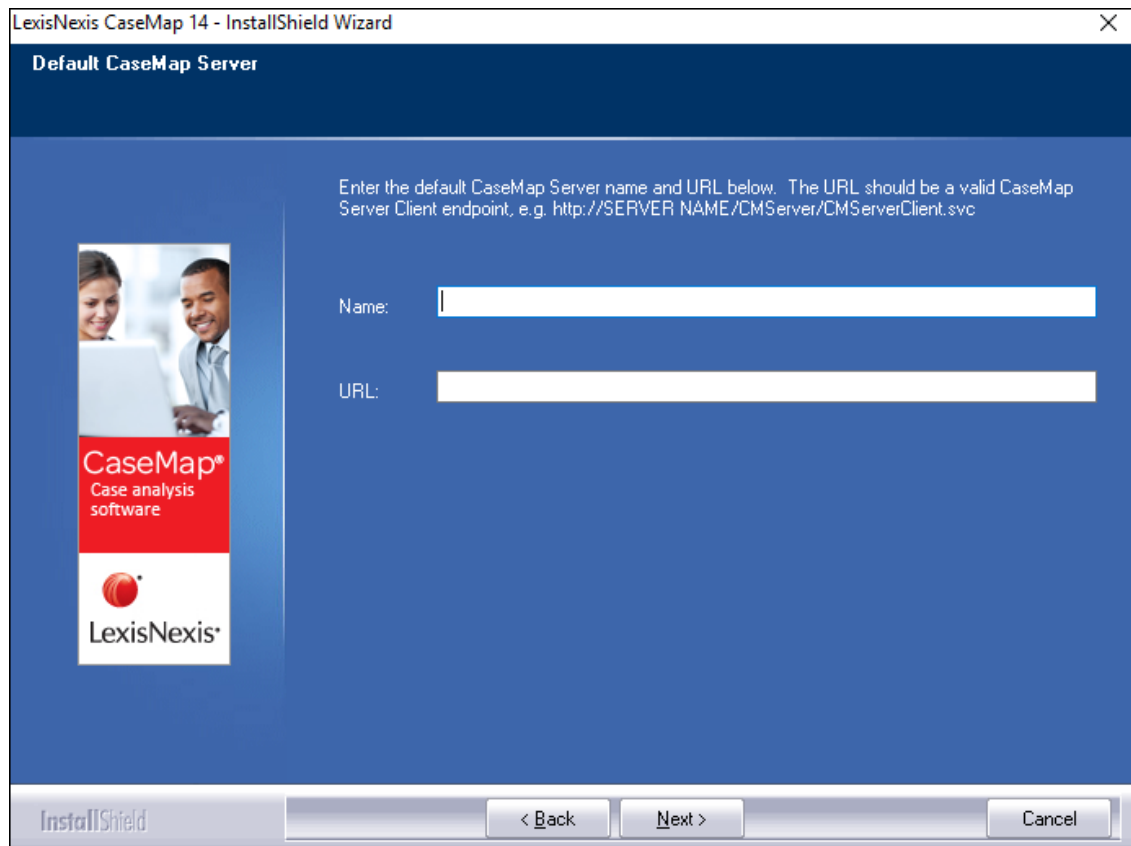
3. In the License Agreement dialog box, click **Yes**.



4. In the Information dialog box, review the installation information, then click **Next**.

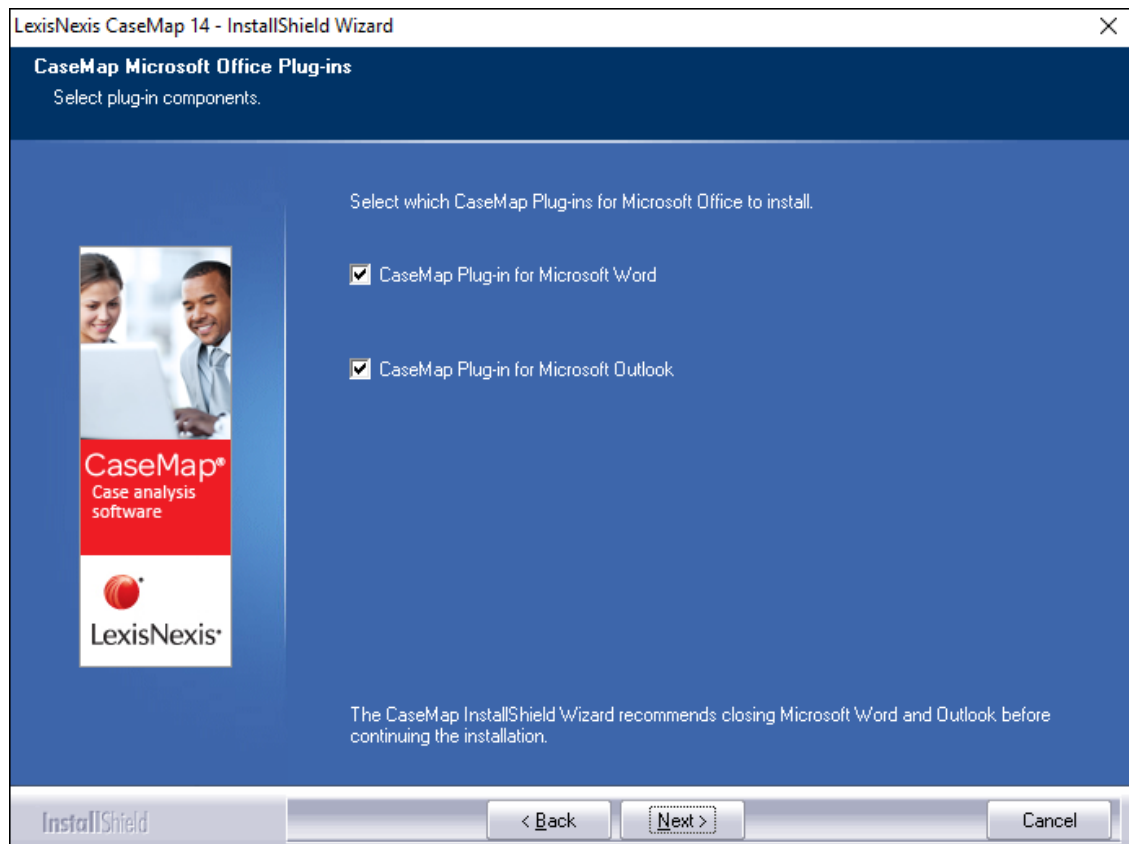


5. In the Default CaseMap Server dialog box, type the default CaseMap Server name and the URL for CaseMap Server, then click **Next**.



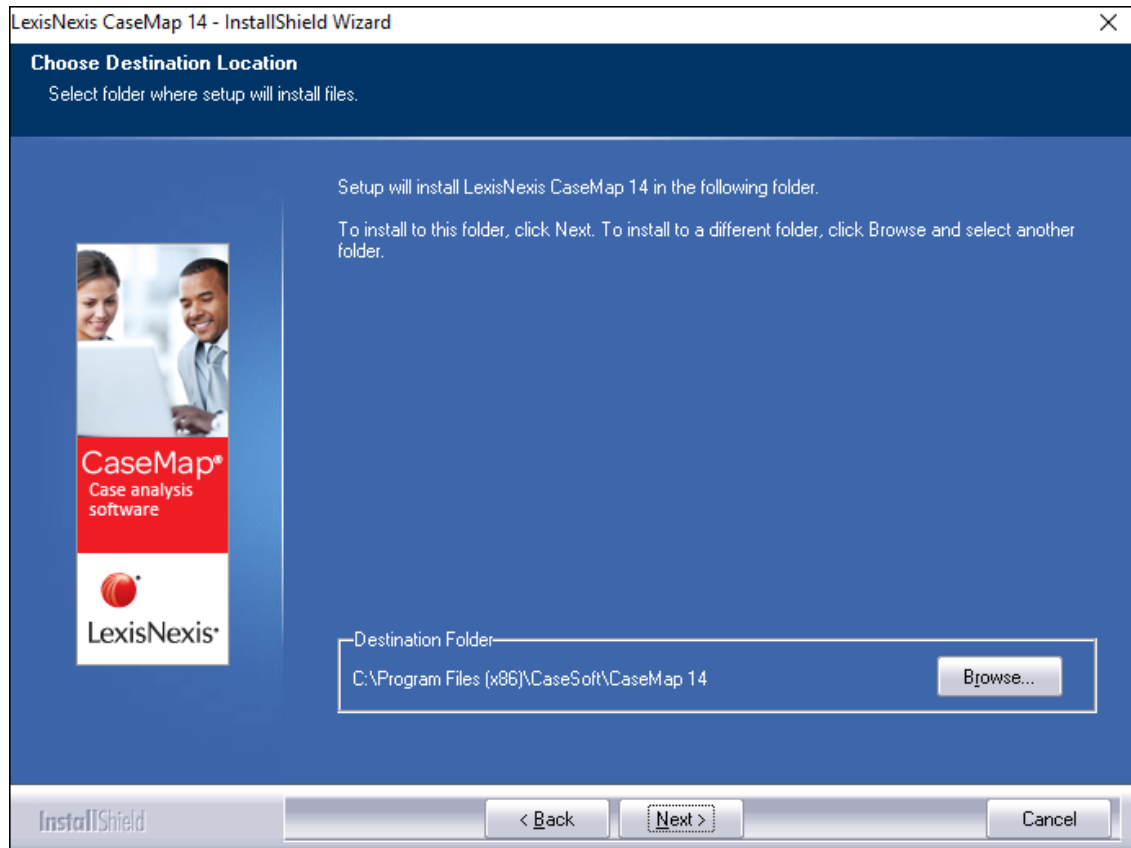
This dialog box only displays if you are installing CaseMap Server.

6. In the CaseMap Microsoft Office Plug-ins dialog box, select plug-ins you want to install: **Microsoft Word** and **Microsoft Outlook** are choices. Clear the check box for a plug-in you do not want installed.



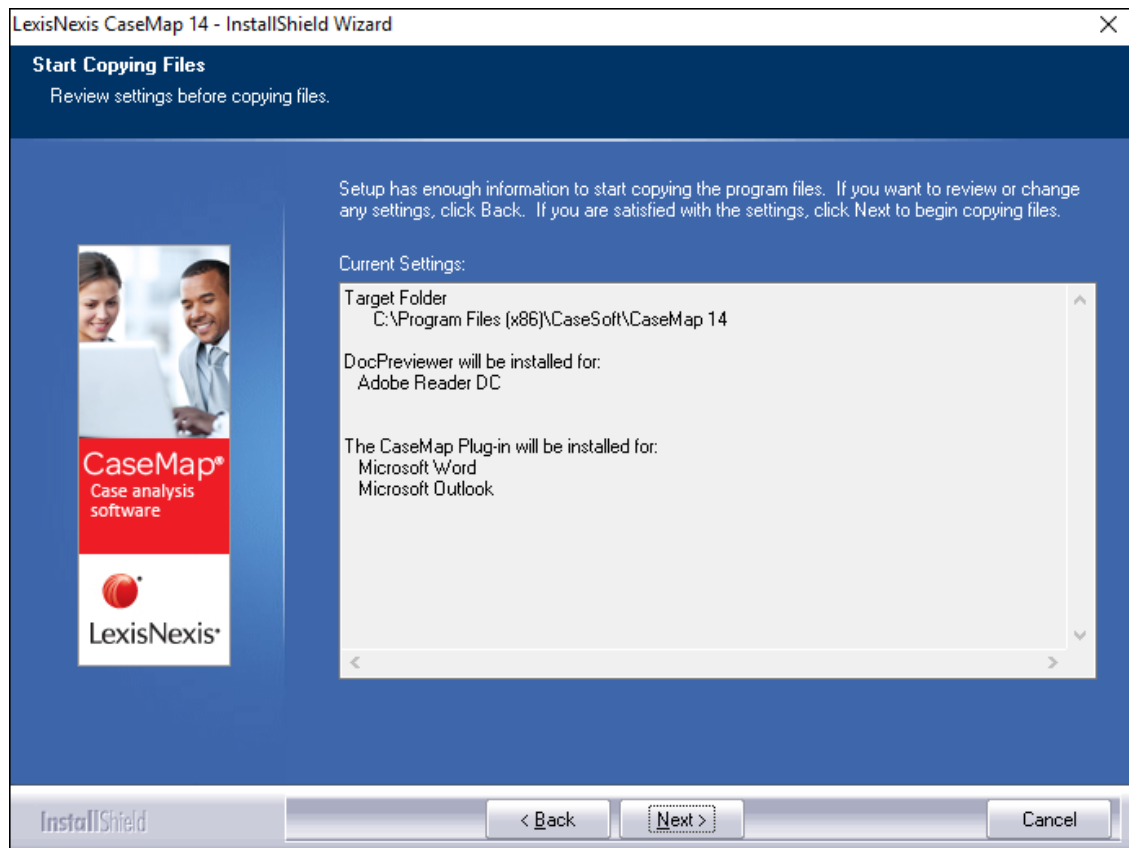
These plug-ins allow case users to send data from Word or Outlook to a case.

7. In the Choose Destination Location dialog box, verify whether the default destination folder is the appropriate location, then click **Next**.

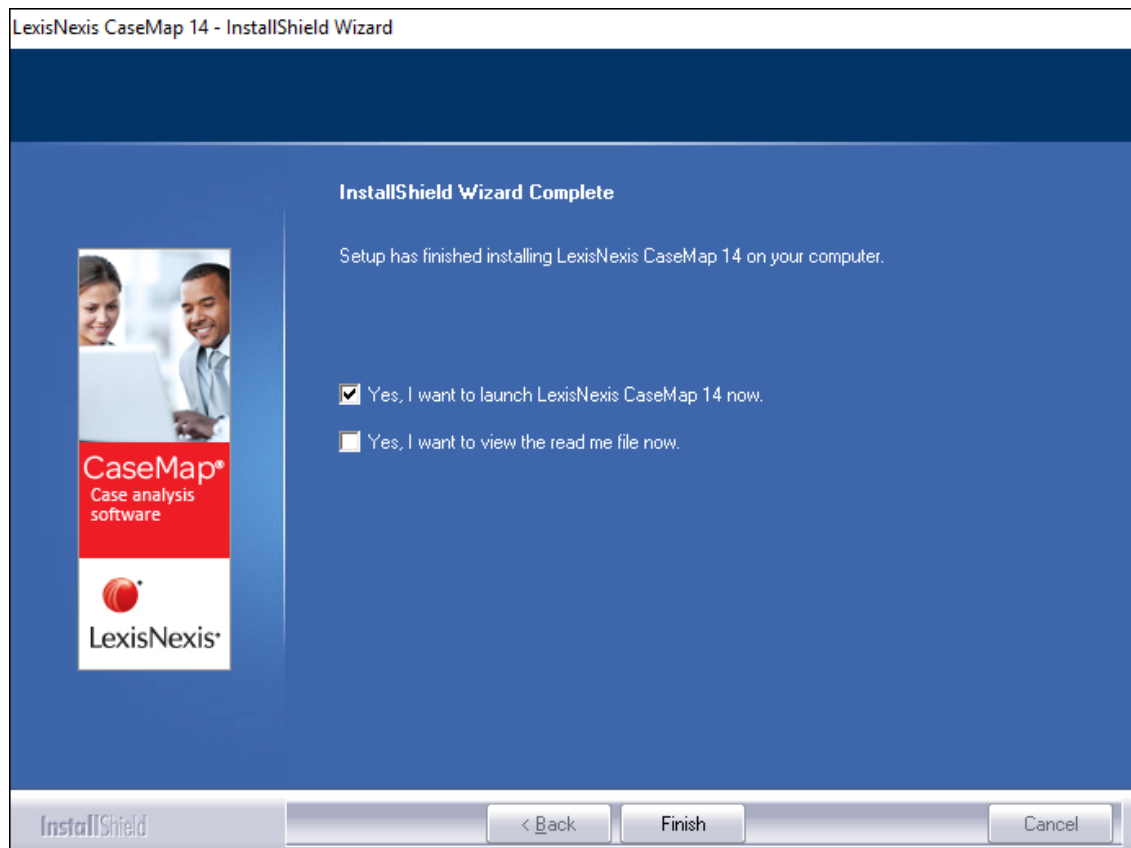


The default folder is C:\Program Files (x86)\CaseSoft\CaseMap 14.

8. In the Start Copying Files dialog box, review the current settings, then click **Next**.



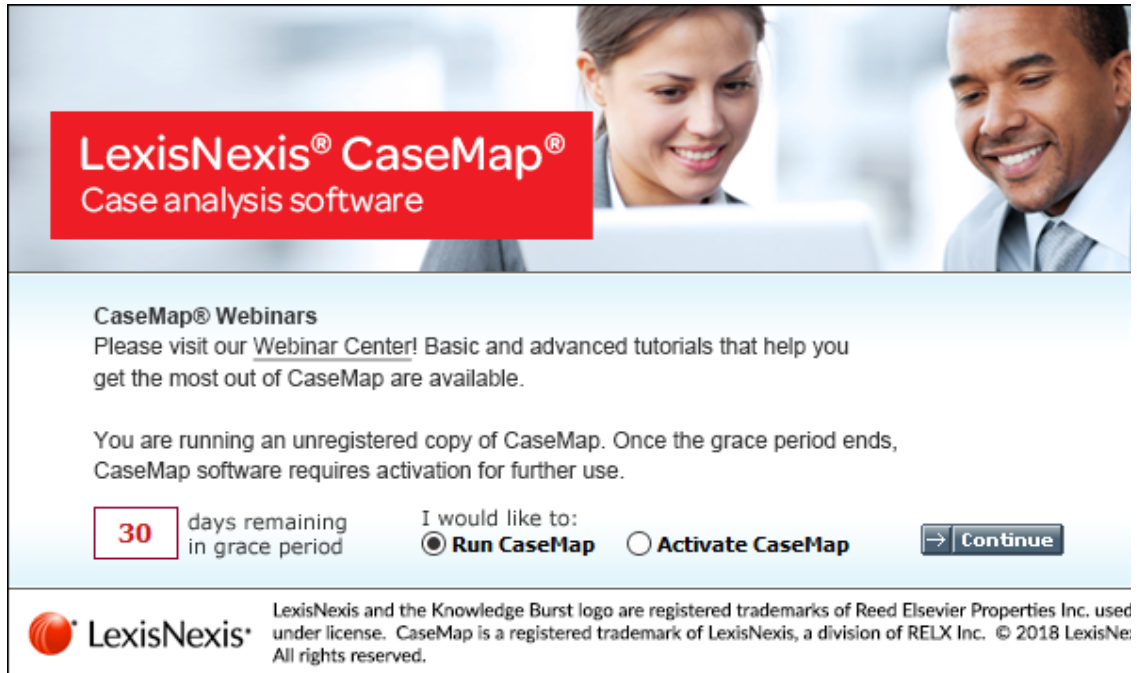
9. In the InstallShield Wizard Complete dialog box, click **Finish**.



CaseMap starts.

To activate CaseMap

1. Start CaseMap if it is not already started.
2. In the Welcome to CaseMap dialog box, select **Activate CaseMap**, and then click **Continue**.




LexisNexis® CaseMap®
Case analysis software


CaseMap® Webinars
Please visit our [Webinar Center](#)! Basic and advanced tutorials that help you get the most out of CaseMap are available.

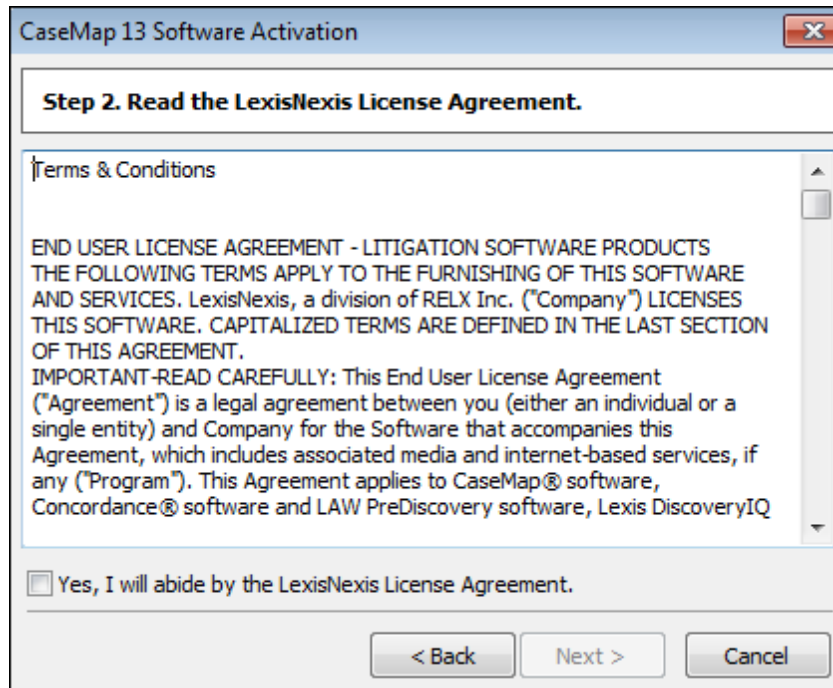
You are running an unregistered copy of CaseMap. Once the grace period ends, CaseMap software requires activation for further use.

30 days remaining in grace period I would like to: **Run CaseMap** **Activate CaseMap** [Continue](#)

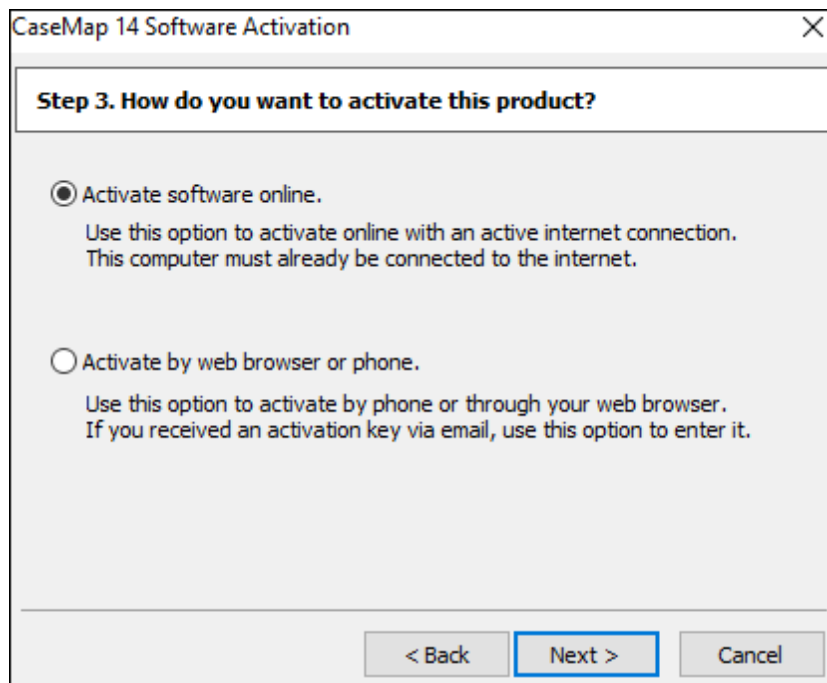
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- 3.
4. In the CaseMap 14 Software Activation dialog box, click **Next**.
5. Provide registration details and then click **Next**:
 - In the **Registration Name** field, type in your user name for license registration.
 - In the **Registration ID** field, type in your registration ID.
 - In the **Product ID** field, type in the CaseMap license number.

 You must be registered with LexisNexis as a valid user of this software to have this registration information. When you register with LexisNexis, you should receive this information via email or phone.
6. Read the license agreement and then select **Yes, I will abide by the LexisNexis License Agreement** if you agree to the terms, and then click **Next**.



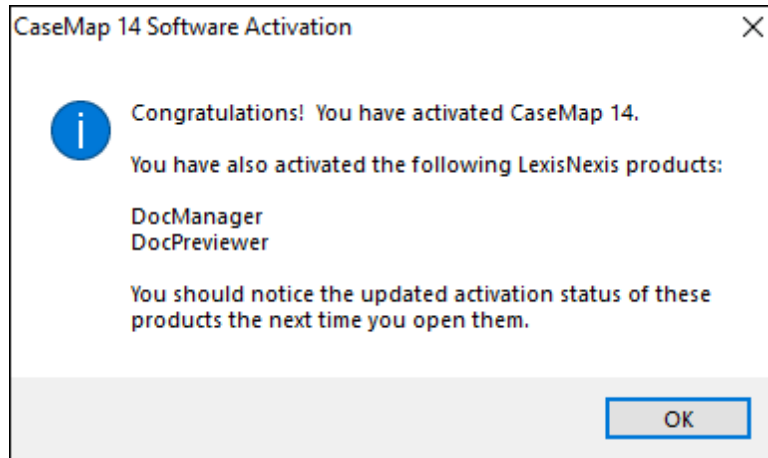
7. Select an activation method and then click **Next**:



- **Activate software online** — Use this option to activate online with an active internet connection.
 - **Activate by web browser or phone** — Use this option if you received an activation key via email.
8. In the summary dialog box, review the license registration information and then click

Next.

9. Click **Finish**, and then in the confirmation message box, click **OK**.



10. CaseMap starts and you can begin using it.

Related Topics

- [About preliminary planning](#)
- [Before installation](#)
- [System requirements](#)
- [Registering the SQL server in CaseMap](#)
- [Converting local cases](#)
- [Updating CaseMap versions](#)

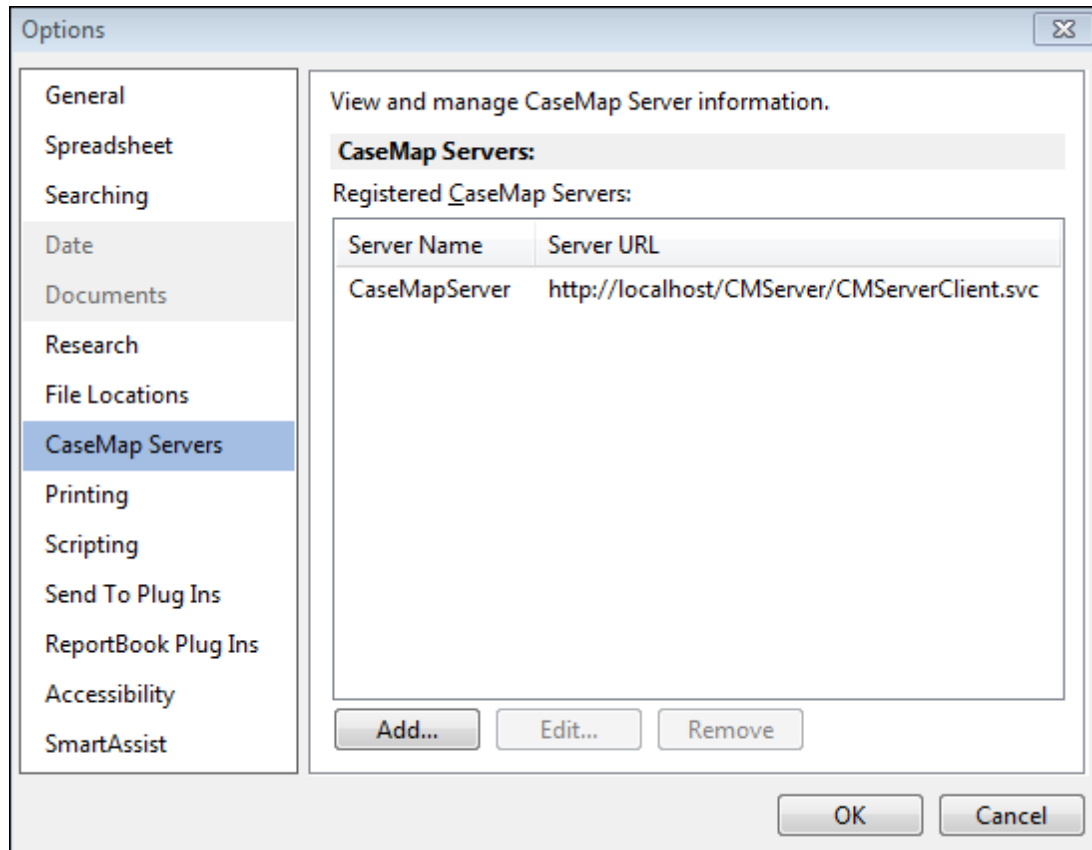
Registering the CaseMap Server in CaseMap

If you are using CaseMap with CaseMap Server and did not register a server during CaseMap installation, you will need to register a CaseMap Server in the client application in order for users to access SQL cases in CaseMap.

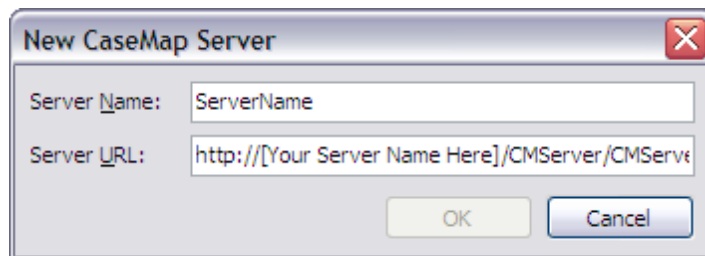
For more information about CaseMap Server, refer to the [CaseMap Server](#) documentation.

To register a CaseMap Server in CaseMap

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **CaseMap Servers** tab.



3. Click the **Add** button.
4. In the **New CaseMap Server** dialog box, type in the client server address in the **Server Name** field.



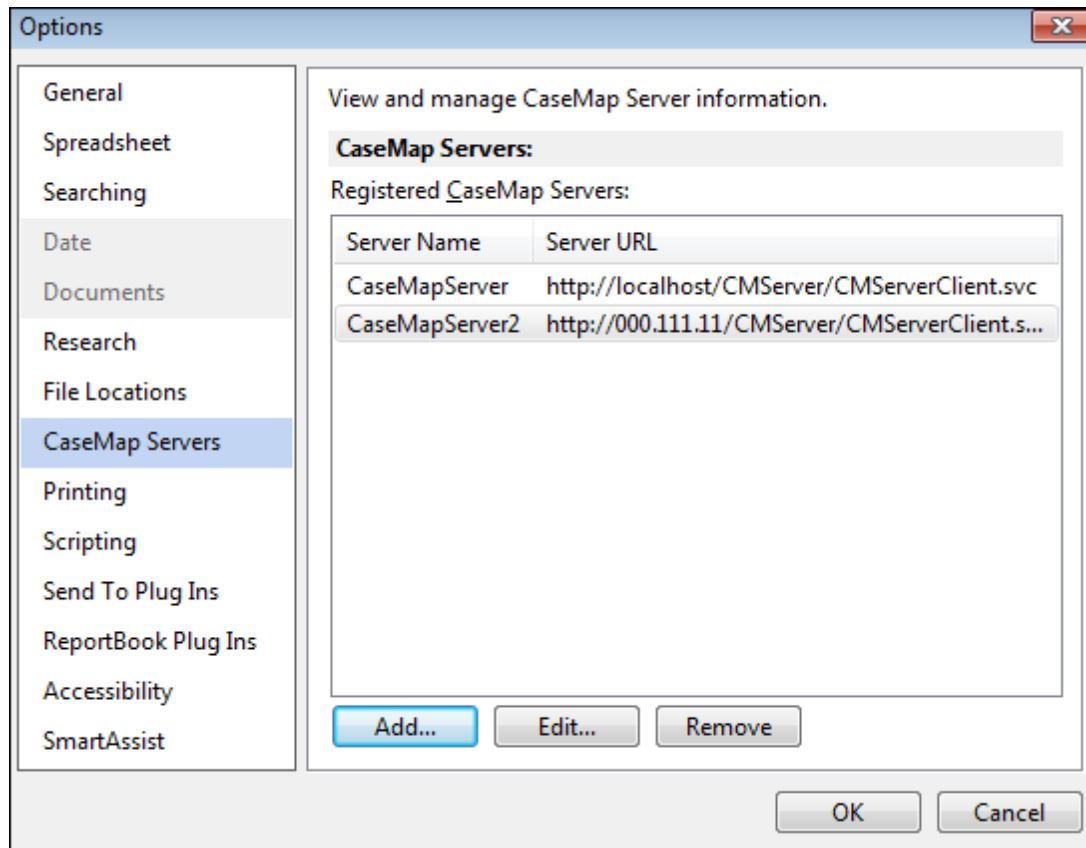
5. In the **Server URL** field, type in the path to the server, then click **OK**.
For example: *http://[Your Server Name Here]/CMServer/CMServerClient.svc*.
6. Click **OK** when you are finished.

The server you registered now displays in the Registered CaseMap Servers box.

To edit a CaseMap Server in CaseMap

1. On the **File** menu, click **Options**.

2. In the **Options** dialog box, click the **CaseMap Servers** tab.



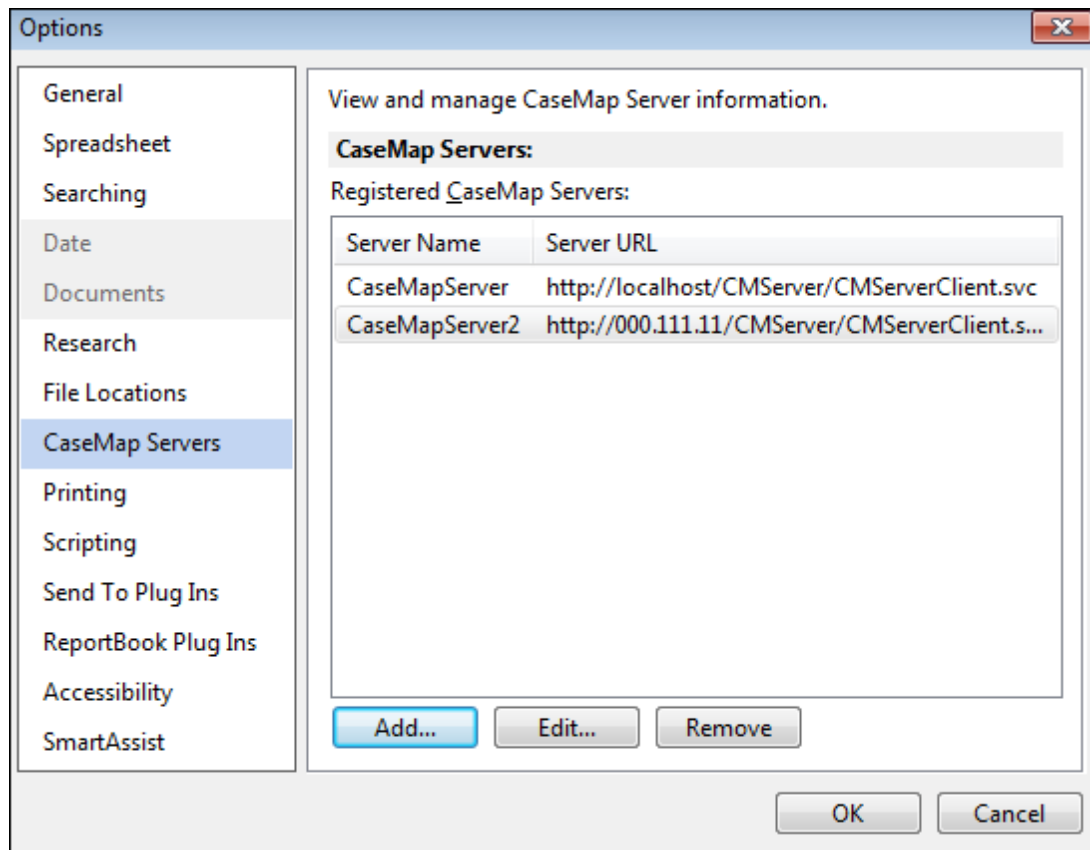
3. In the **Registered CaseMap Servers** box, select the server you want to edit.
4. Click the **Edit** button.
5. In the **Edit CaseMap Server** dialog box, modify the server name or server URL, then click **OK**.

The changes now display in the Registered CaseMap Servers box.

6. Click **OK** to save your changes.

To remove a registered server in CaseMap

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **CaseMap Servers** tab.



3. In the **Registered CaseMap Servers** box, select the server you want to remove.
4. Click the **Remove** button.

The selected server no longer displays in the Registered CaseMap Servers box.

5. Click **OK** to save your changes.

Related Topics

[Installing CaseMap](#)

Converting local cases

CaseMap continues to allow you to convert previous version cases to the new current release version. For example, you can upgrade a CaseMap v13.0 case to a CaseMap v14.0 case and have it still write to a Microsoft® Access database. Use the CaseMap SQL Import Utility to migrate local cases to SQL cases.

When upgrading a previous version case to a new version, CaseMap recognizes the older case

format, such as a CaseMap v13.0 file (.cm13 extension) and offers to convert it to the new version format for you. It only takes a minute or so to convert previous cases to the new CaseMap format.

During the conversion process, CaseMap does not change anything in your existing CaseMap file. It creates a brand new case and copies all information from the old case into the new one. Additionally, CaseMap changes the file extension of the older version, such as .cm10 to .001. This change keeps users from inadvertently reopening the old case and using a previous CaseMap license.

If a case already exists with the same name and extension, the numbers will increment to ".002" and ".003" to ensure a unique name. We recommend that you inform case staff when the import is complete and that the original case is now renamed.

✍ Previous versions of CaseMap are not used during the conversion process, so you can uninstall them at any time.

⚠ Once a case has been converted to a new version format, users can no longer access it using an older CaseMap version. We recommend that all users get new versions installed at the same time.

To convert cases to a new CaseMap version

1. On the **File** menu, click **Open**.
2. Click **Computer**, to open the **Open Local Case** dialog box.
3. In the **Open Local Case** dialog box, select/click on the case you want to convert to the newer version of CaseMap.
4. In the message box, review the selected case information, then click **OK**.
5. In the **Select the name and location of the converted case file** dialog box, ensure the File name for the case to be updated is correct/desired, and then click **Save**.
6. In the message box confirming case conversion, note the location of the file, and then click **OK**.

The message box displays the directory location of the original case and its new file extension.

Related Topics

[Installing CaseMap](#)

[Updating CaseMap versions](#)

Updating CaseMap versions

When you receive notification that a current version of CaseMap has an update available, you can quickly download it to ensure you have the latest tools and fixes needed for using CaseMap successfully.

IT staff and litigation support professionals should alert users when they are eligible to receive a new version of CaseMap for their licenses. The latest version can be downloaded at www.lexisnexis.com/casemap by following the instructions for installing CaseMap.

Once you have updated CaseMap, review the What's New topic for release information detailing feature enhancements for the version you are now using.

To update CaseMap

1. Verify that the computer you are using has an active Internet connection for the update.
2. Open **CaseMap** on the desktop for the license holder needing the update.
3. On the **File** menu, click **Help & Info**, and then click **Update CaseMap**.
4. In the **CaseMap WebUpdate** dialog box, click **Continue**.

A status screen displays the installation process for the update and then displays a message with the version installed when it completes.

If you currently have all updates installed, you receive a message indicating that you have the current version.

Related Topics

[Before installation](#)

[System requirements](#)

[Installing CaseMap](#)

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