

CaseMap® DMS Plug-in for Open Text® ver. 2.0 Read Me

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The CaseMap® DMS Plug-in for Open Text® is developed and supported by LexisNexis CaseMap, <http://www.casesoft.com>. Please contact LexisNexis CaseMap technical support with any question or issues with using the plug in. 904-273-5000 (M-F 0900-1800 ET).

1. System Requirements

LexisNexis CaseMap 4.5 or higher must be installed on the computer you are installing this plug-in to.

The latest version of the CaseMap® DMS Plug-in for Open Text® supports the Bulk Send feature. To make use of this feature you must have CaseMap 7.0 or higher installed.

LiveLink ECM - eDOCS DM Extensions version 5 or higher must also be installed on the computer you are installing this plug-in to.

Note that Hummingbird DM was acquired by Open Text and was rebranded to "OpenText LiveLink ECM - eDOCS DM".

The following OpenText/Hummingbird products are NOT supported by this plug in:
Livelink ECM - DOCS Open

Hummingbird/PC DOCS DOCS Open
Livelink ECM - eDOCS Webtop
Hummingbird Enterprise - Enterprise Webtop

2. Installing CaseMap® DMS Plug-in for Open Text®

On Windows XP, Vista, or 2000 you must be logged on with administrative rights to install this plug-in.

Make sure you close any open programs before proceeding with the installation.

The setup will remove version 1.0.0.1 of the plug-in if it is present on the system you are installing the latest version of the plug-in to.

The plug-in installation adds CaseMap integration menu items to DM Extensions. If you later change the installation of DM Extensions, you will likely have to reinstall this plug-in for the plug-in's menu items to appear.

3. Uninstalling CaseMap® DMS Plug-in for Open Text®

To uninstall this plug-in go to Add/Remove Programs in the Windows Control Panel and select "LexisNexis CaseMap® DMS Plug-in for Open Text®" from the list. The uninstall will remove the menu items the installation added.

4. Using CaseMap® DMS Plug-in for Open Text®

When the plug-in is installed, you will notice a CaseMap menu item on the Document submenu in DM Extensions. The CaseMap menu item also appears on DM Extensions' document popup menu. The document context menu appears when you right mouse click on a document.

The CaseMap menu item has five submenu item commands:

1. Send Document to CaseMap - New
2. Send Document to CaseMap - Update
3. Show Linked CaseMap Record Detail
4. Go To Linked CaseMap Record
5. Bulk Send Selected Documents to CaseMap

Before using any of the commands, you should open a CaseMap case you would like to link one or more documents to. The first four commands only work with a single document selected in DM extensions. If you have more than one document selected the first four command menu items will be disabled. The fifth command menu item can be used with one or more documents selected.

4.1. Send Document to CaseMap - New Command

This command will create a new Object or Authority record in the current CaseMap case. The plug-in will automatically set the new CaseMap record's linked file to link to the selected DM document. You can later open the linked DM document from CaseMap.

4.2. Send Document to CaseMap - Update Command

This command will update the selected Object, Authority, or Extract record in the current CaseMap case. The plug-in will automatically set the CaseMap record's linked file to link to the selected DM document. You can later open the linked DM document from CaseMap.

4.3. Show Linked CaseMap Record Detail Command

This command will open the CaseMap record detail form in DM Extensions containing the data for the CaseMap record linked to the selected DM document.

4.4. Go To Linked CaseMap Record Command

This command will bring CaseMap to the foreground, locate and select the record that is linked to the selected DM document.

4.5 Bulk Send Selected Documents to CaseMap

This command will create a new Document Object record in the current CaseMap case for each document selected in DM. Additionally, you will have the option to map DM field data to CaseMap Document fields. The plug-in will automatically set each new CaseMap record's linked file to link to the appropriate DM document. You can later open the linked DM documents from CaseMap.

5. Working Offline with DM Documents

The CaseMap® DMS Plug-in for Open Text® is capable of working with DM

documents when you are not connected to your DM server. In order to work offline, your computer must have DM extensions installed and the DM Attaché configured for your use.

The DM Attaché is the offline repository for your DM Documents. When you are working offline, the CaseMap® DMS Plug-in for Open Text® will access your DM documents via the DM Attaché. In order to access DM documents in offline mode, you must add them to your DM Attaché when you are connected to your DM server.

The CaseMap® DMS Plug-in for Open Text® can also access DM documents in your DM Shadow folder when working offline.

After you have sent documents from DM to your CaseMap case, you will have an option in CaseMap to move linked documents to your DM Attaché.

Navigate to your Documents or Authorities spreadsheet. Click on the "Tools" menu. Select the "Linked Files" sub-menu. Select the "Batch Processing" sub-menu. Under the group header for "Hummingbird-DM" click the command titled "Add Linked Documents to Attaché." This will send a list of your currently linked DM documents to DM to have them added to your Attaché.

6. Setting up Default Bulk Send Mappings

We have created a way for administrators to set up default field mappings for a particular DM library so that individual users do not need to worry about modifying field mappings each time they work with a new DM library.

The plug-in loads the mappings from a file named for the DM library plus a file extension of .cmbulkmap. The path to these files is determined by a setting stored in the following registry key:

HKEY_LOCAL_MACHINE\SOFTWARE\CaseSoft\CaseMap-DM Plug In

with a value name of MappingsPath. During the install of the plug-in, the path is set in the install INI and then stored in the registry.

To set this registry value on install, do the following:

1. Download and save the installation package.
2. Run the following command-line:
<Path to setup package>\<Name of setup package>.exe -extract_all:"<path to extract to>"
3. It should only show an hourglass briefly. Once extracted, there will be a Disk1 folder in the specified path.

4. Open the Disk1 folder and then open the _setup.ini file.
5. In the [SETUP] section, set the value of MAPPINGSPATH to the desired path.
[SETUP]
MAPPINGSPATH=C:\MyPath
6. Save the changes to _setup.ini.
7. When installing, run the Setup.exe from the Disk1 folder.

The user can send documents from more than one DM library at once. The plug-in will look for a default mappings file in the specified path for each library from which documents are being sent. So, if Library1, Library2 and Library3 were three DM libraries, then there could be three files stored in the mappings path called Library1.cmbulkmap, Library2.cmbulkmap and Library3.cmbulkmap.

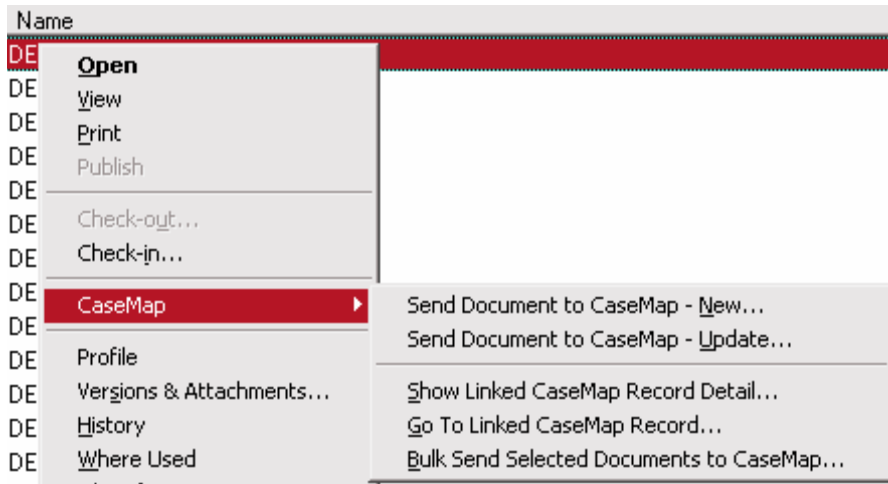
If a matching file is found, then the mappings will be loaded from that file. If not, then the default field mappings are loaded, which are:
DM's DOCNAME field maps to the CaseMap Full Name field

No error messages will be displayed if the plug-in cannot find the mappings path or particular file. The loaded mappings are reflected in the Bulk Send wizard.

To save default mappings for a library, do the following:

1. Open a case in CaseMap.
2. Select one or more documents in DM Extensions.
3. Right-click on one of the selected documents, go to CaseMap -> Bulk Send Selected Documents to CaseMap.
4. Choose Yes to modify the field mappings. Click Next.
5. Verify the selected CaseMap case. Click Next.
6. If necessary, click on the tab for the desired DM Library.
7. Click the Modify button.
8. Make any desired changes to the field mappings.
9. Click the Options button at the bottom left and choose "Save Mappings to File...".
10. Browse to the path specified at the time of installation.
11. Name the file with the name of the library. It must match exactly, except that it is not case-sensitive.
12. Click Save.

Your mappings are saved regardless of whether or not you choose to continue with sending the documents to CaseMap.



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