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WESTLAW CASE NOTEBOOK
APPLICATION SUITE
INSTALLATION GUIDE

APRIL 2012



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1 Introduction

This installation guide provides you with information about installing the Westlaw Case Notebook Application Suite.

Note: The name of the Westlaw Case Notebook client application varies according to your license – Westlaw Case Notebook, Westlaw Case Notebook Research, or Westlaw Case Notebook (Transcripts). Your license does not affect the installation of the products or their use with other applications in the suite. This document refers to all versions of the client application as Case Notebook.

Components of the Westlaw Case Notebook Application Suite

The three main components of the Case Notebook Application Suite are:

- Westlaw Case Notebook Repository: a database for your Case Notebook shared cases.
- Westlaw Case Notebook Administration: a program your Case Notebook administrator uses to create and manage the shared cases in the repository.
- Case Notebook: the client application you use to save and work with important documents, research, and transcripts in a case.

Note: For a diagram of the Case Notebook Application Suite components, see Appendix A: Components of the Westlaw Case Notebook Application Suite.

WESTLAW CASE NOTEBOOK

Case Notebook is the client application used to work with important documents, research, and transcripts in a case. Case Notebook is installed on each user's computer.

WESTLAW CASE NOTEBOOK REPOSITORY

You must use Case Notebook Repository if you want multiple users to have access to Case Notebook cases. Install Case Notebook Repository on a server (Windows Server 2003 or Windows Server 2008) that is accessible to all Case Notebook users and administrators. Each user's computer must have a TCP connection to Case Notebook Repository.

Case Notebook Repository performs a scheduled backup of user information and case locations at the end of each day and stores the information in the backup directory for Microsoft SQL Server. For example, C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup. The exact location may vary depending on the name of your SQL Server instance.

Note: Case files are not backed up as part of the repository backup.

Case Notebook Repository includes the following:

Westlaw Case Notebook Repository Service

The Case Notebook Repository Service runs a SQL service that is used to authenticate users and direct them to shared cases.

Westlaw Case Notebook Data Repository

The Case Notebook Data Repository is a proprietary database file where your secure case files are stored and managed by Case Notebook Administration.

Secure Case Files

Secure case files are a set of proprietary formatted files that are stored on a local area network (LAN) or wide area network (WAN). You must use a Uniform Naming Convention (UNC) path for Case Notebook Repository to point to where case data is stored in a database file. A UNC path follows this format: \\server\volume\directory\file, and it is not case sensitive. For example, \\Shared_svr\Shared\Network\Orders.lns.

WESTLAW CASE NOTEBOOK ADMINISTRATION

Case Notebook Administration is installed on each Case Notebook administrator's computer and connects to the repository SQL service.

Note: If you want to import local cases into Case Notebook Repository, you must install Case Notebook Administration on the same machine with Case Notebook and the local case.

MICROSOFT SQL SERVER 2005 EXPRESS

If needed, you can have Case Notebook install Microsoft SQL Server 2005 Express. If you want to replicate cases offline or create local cases in Case Notebook, you must install Microsoft SQL Server 2005 Express. For further information on installation options, see "Installation Options" on page 4.

Case Notebook Repository works with the Microsoft SQL Server 2005 Express database that it installs, or with an existing installation of SQL Server 2005, SQL Server 2005 Express, or SQL Server 2008 R2.

WESTLAW CASE NOTEBOOK TERMINAL SERVICE (OPTIONAL)

Case Notebook Terminal Service provides remote access to Case Notebook through Microsoft Terminal Services, Microsoft Remote Desktop Services, Citrix Presentation Server, or Citrix XenApp (Citrix Presentation Server is now called XenApp).

Important: When a previous version of Case Notebook that was published for Citrix is upgraded to version 3.0, the upgraded application needs to be published again.

If you are using a remote access service, you can connect to a real-time transcript using LiveNote Stream. You cannot replicate cases to offline. Additionally, the quality of streaming video for historical transcripts may vary substantially depending on your hardware and network capacity.

Note: For more information on LiveNote Stream, download a free copy of the *Westlaw Case Notebook User Guide* at store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.

For a diagram of the components of the Case Notebook Application Suite using Citrix Presentation Server or Citrix XenApp, see Appendix B.

System Requirements

You will need the following to operate Case Notebook, Case Notebook Repository, and Case Notebook Administration. If you intend to view video with Case Notebook, use the recommended configurations.

SUPPORTED OPERATING SYSTEMS

The tables below provide information about supported operating systems for the components of the Case Notebook Application Suite.

Table 1-1. Case Notebook and Case Notebook Administration Supported Operating Systems

Operating System	32-bit	64-bit
Windows XP Home SP3+	x	
Windows XP Professional SP3+	x	
Windows Vista Home Premium SP2+	x	x
Windows Vista Business	x	x
Windows 7 Home Premium	x	x
Windows 7 Professional	x	x
Windows Server 2003 ¹	x	x
Windows Server 2008 ¹	x	x
Windows Server 2008 R2 and R2 SP1 ¹		x

1. Case Notebook Administration only

Table 1-2. Case Notebook Terminal Services Supported Operating Systems

Operating System	Native Terminal Services	CPS 4.5 ¹	XenApp 5 ²	XenApp 6 ²
Windows Server 2003	x	x	x	
Windows Server 2008	x	x	x	
Windows Server 2008 R2 and R2 SP1	x	x	x	x

1. Citrix Presentation Server 4.5 with Feature Pack 1

2. CPS is now called XenApp

Table 1-3. Case Notebook Repository and RAS Supported Operating Systems

Operating System	32-bit	64-bit
Windows Server 2003	x	x ¹
Windows Small Business Server 2003	x	
Windows Server 2008	x	x
Windows Server 2008 R2		x
Windows Small Business Server 2008 R2		x

1. Supported when IIS is running in 32-bit mode.

Note: When running Windows Server 2008 R2, Internet Information Services (IIS) must be in 6.0 compatibility mode. For further information about RAS, download a free copy of the *Westlaw Case Notebook RAS Installation Guide* at store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.

HARDWARE

For Windows XP

- Personal computer with Pentium 4 processor (1 GHz recommended)
- 1 GB of RAM (2 GB recommended)
- 50 GB of available hard disk space (100 GB recommended)

For Windows Vista and Windows 7

- Personal computer with dual core processor
- 3 GB of RAM
- 50 GB of available hard disk space (100 GB recommended)

OTHER REQUIREMENTS FOR WESTLAW CASE NOTEBOOK

- Microsoft Internet Explorer 6 or later
- Windows Media Player 9 or later
- One free serial port for real-time connection

Note: If you do not have a free serial port, you can connect to a real-time session with a serial adapter connected to a USB port or through the Internet with LiveNote Stream.

Installation Options

You have multiple options for installing the Case Notebook Application Suite.

WESTLAW CASE NOTEBOOK

The names of the following Case Notebook installers indicate the product to be installed and whether SQL server is installed. Your subscription determines which version of Case Notebook is installed.

Note: If you want to work on cases offline, you must install a version that includes SQL server.

- `WLCNBNOSQL-3.0.exe`—Installs Case Notebook without SQL server on 32- or 64-bit operating systems.
- `WLCNBSQL32-3.0.exe`—Installs Case Notebook with Microsoft SQL Server 2005 Express on 32-bit operating systems.
- `WLCNBSQL64-3.0.exe`—Installs Case Notebook with Microsoft SQL Server 2005 Express on 64-bit operating systems.

WESTLAW CASE NOTEBOOK ADMINISTRATION AND WESTLAW CASE NOTEBOOK REPOSITORY

The names of the following Case Notebook Administration and Case Notebook Repository installers indicate the product to be installed and whether SQL server is installed.

- WestlawCNBAdmin-3.0.exe installs Case Notebook Administration. You can install on the network with any of the supported operating systems and, if desired, on computers where Case Notebook is installed.
- WestlawCNBRepositorysql32-3.0.exe installs Case Notebook Administration and Case Notebook Repository with 32-bit Microsoft SQL Server 2005 Express on 32-bit servers.
- WestlawCNBRepositorysql64-3.0.exe installs Case Notebook Administration and Case Notebook Repository with 64-bit Microsoft SQL Server 2005 Express on 64-bit servers.

Note: If you have your own instance of SQL server, see "Installing Westlaw Case Notebook Repository on an Existing SQL Server" on page 11.

To determine whether your Windows Vista or Windows 7 operating system is 32- or 64-bit, click the **Start** button, right-click **My Computer**, and then click **Properties**. The version you have installed is indicated on the General tab under System.

If you are installing on a network, contact your system administrator to determine what type of operating system is on the server.

Upgrading a License Code

If you need to replace an expired license code, upgrade a demo license, or upgrade to Case Notebook from Case Notebook (Transcripts), complete these steps:

1. On the **Help** menu in Case Notebook, click **License**. The **Westlaw Case Notebook Licensing Information** dialog box is displayed (Figure 1-1).

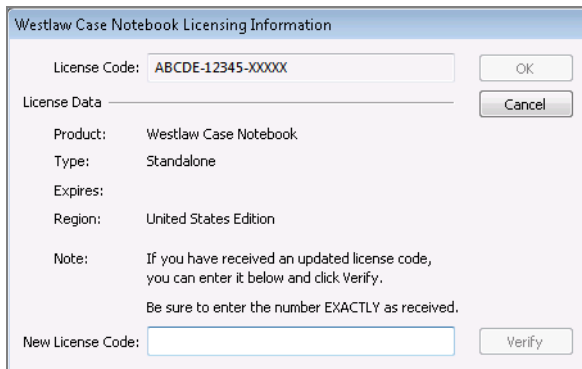


Figure 1-1. Westlaw Case Notebook Licensing Information dialog box

2. Type or paste your new license code in the **New License Code** box and click **Verify**.
3. A message indicates whether or not the new license code is valid. Click **OK** to continue.

Note: If you entered an invalid license code, ensure you are using the code exactly as it was sent to you from Thomson Reuters.

4. Once you have entered a valid license code, click **OK** and then restart Case Notebook.

Note: If you are upgrading from an earlier version of Case Notebook, you should always use the **Customer Information** dialog box in the installer to apply a new license code.

2 Installing the Westlaw Case Notebook Application Suite

If you are using LiveNote/Case Notebook version 2.x, you can use your existing license code to install version 3.0. If you are using LiveNote/Case Notebook version 1.x or older, you will need to request a new license code for the installation.

For new customers, an email will be sent to you from Thomson Reuters verifying your purchase of the Case Notebook Application Suite. It will include the following:

- A link to the download site for each program in the suite.
- Your installation code for each program in the suite.

Note: The installation code for Case Notebook Administration is the same as the code for Case Notebook Repository.

It is suggested that you follow these steps to install the suite:

1. Install Case Notebook Repository and Case Notebook Administration on one of the supported Windows Server operating systems.
2. License the Case Notebook Repository by launching Case Notebook Administration on the server.
3. Install Case Notebook Administration and Case Notebook where needed.

Installing Westlaw Case Notebook Repository

The following conditions apply when installing Case Notebook Repository:

- You must install Case Notebook Repository on a local drive, not a shared network. The local drive must be denoted by a letter (for example, C:\program files\repository). The drive cannot be listed as a UNC path (for example, \\program files\repository).
- If you have Microsoft SQL Server 2005 or 2008 R2 already installed on your computer, you can use Case Notebook Administration to install Case Notebook Repository. For more information, see "Installing Westlaw Case Notebook Administration" on page 13 and "Installing Westlaw Case Notebook Repository on an Existing SQL Server" on page 11.

Note: When you install Case Notebook Repository, earlier versions are automatically uninstalled. To completely uninstall Case Notebook Repository, you must also uninstall Microsoft SQL Server 2005 Express. Windows Vista users must stop the server service before uninstalling Case Notebook Repository.

To install Case Notebook Repository, complete these steps:

1. Click the link for Case Notebook Repository in the email sent to you from Thomson Reuters to display the Case Notebook Repository registration page.
2. Complete the registration form and click **Proceed to Download** at the bottom of the page.
3. At the next page, click **Proceed with Download** next to the option you want to install (32 or 64-bit).

4. If not already installed on your computer, the installer displays a dialog box indicating that either Microsoft Foundation Class (MFC) or Microsoft SQL Server 2005 Express SP4, or both, will be installed (Figure 2-1).

Note: If you want to use an existing SQL Server, you only need to install Case Notebook Administration. For further information, see “Installing Westlaw Case Notebook Repository on an Existing SQL Server” on page 11.

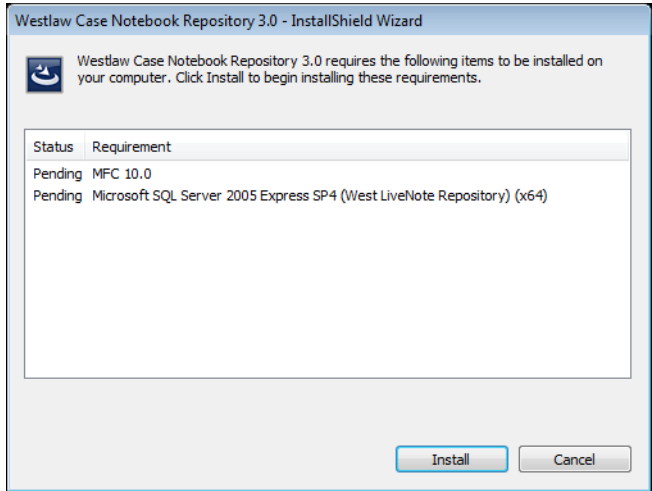


Figure 2-1. InstallShield Wizard dialog box

5. Click **Install**. After Microsoft SQL Server 2005 Express SP4 is installed, the **InstallShield Wizard for Westlaw Case Notebook Repository** dialog box is displayed (Figure 2-2).

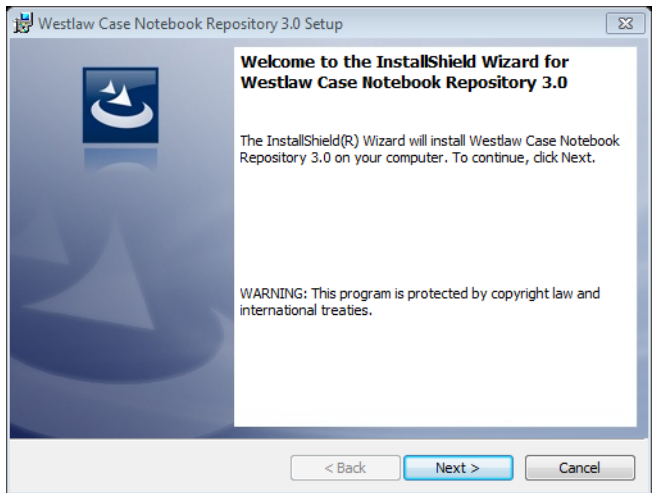


Figure 2-2. InstallShield Wizard for Westlaw Case Notebook Repository dialog box

6. Click **Next**. The **License Agreement** dialog box is displayed (Figure 2-3).

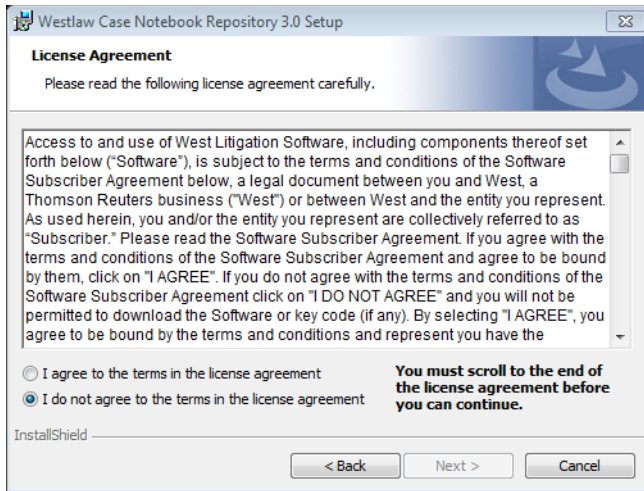


Figure 2-3. License Agreement dialog box

7. Scroll to the bottom of the license agreement as you read it, then click **I agree to the terms in the license agreement** and click **Next**. The **Readme Information** dialog box is displayed (Figure 2-4).

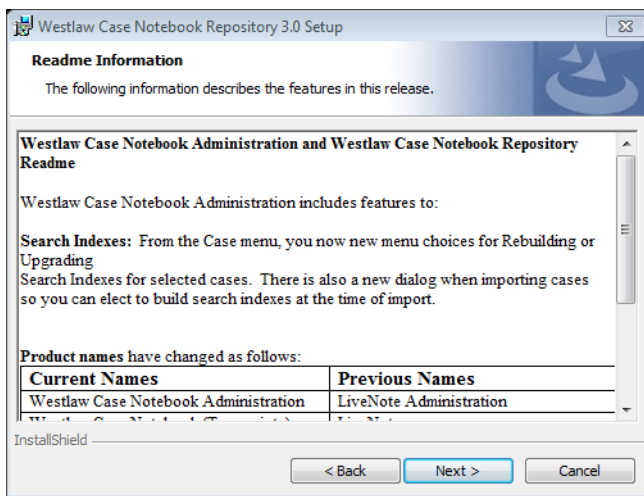


Figure 2-4. Readme Information dialog box

8. After reading the information in the **Readme Information** dialog box, click **Next**. The **Customer Information** dialog box is displayed (Figure 2-5).

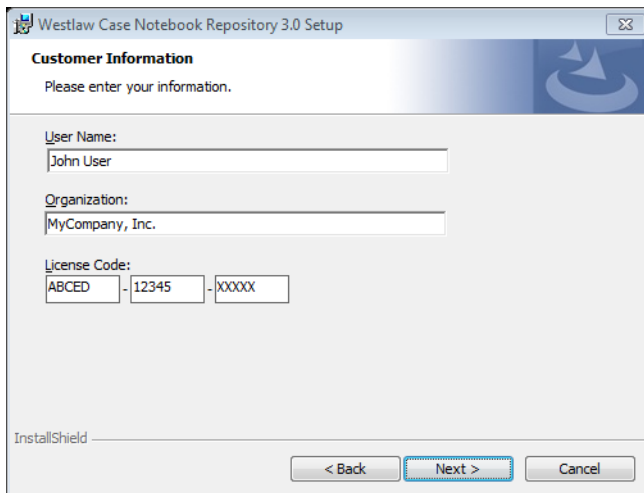


Figure 2-5. Customer Information dialog box

9. Type your name, organization, and Case Notebook Administration license code in the **User Name**, **Organization**, and **License Code** boxes. Click **Next**. The **Destination Folder** dialog box is displayed (Figure 2-6).

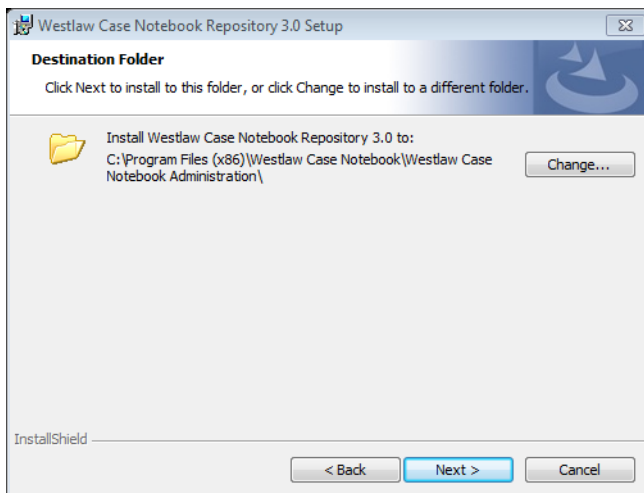


Figure 2-6. Destination Folder dialog box

10. Click **Next**. The **Ready to Install the Program** dialog box is displayed (Figure 2-7).

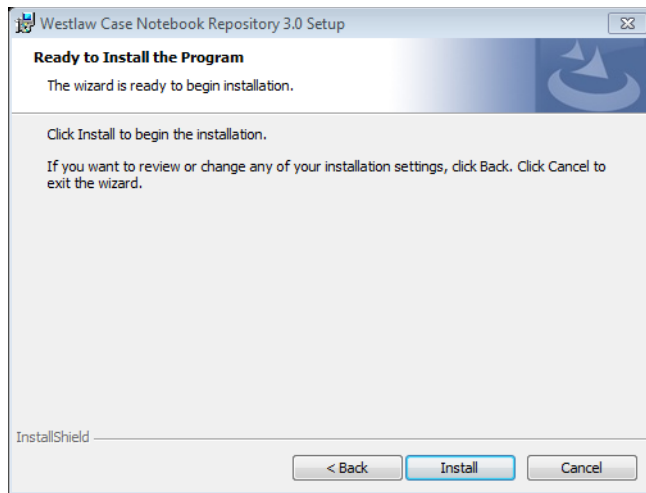


Figure 2-7. Ready to Install the Program dialog box

11. Click **Install** to begin the installation. The **InstallShield Wizard Completed** dialog box is displayed when the installation is complete (Figure 2-8).

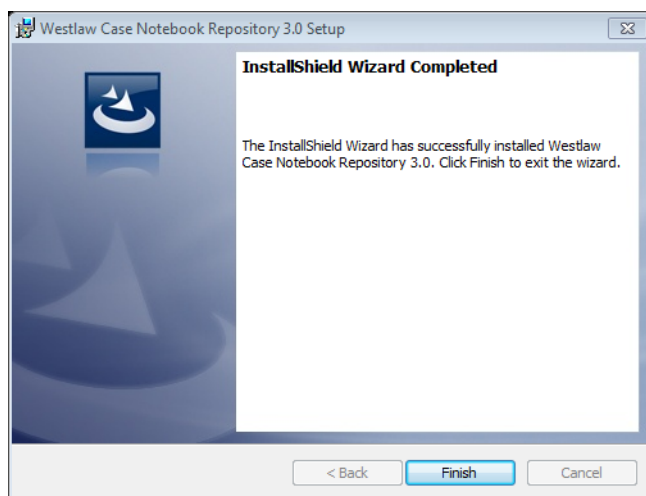


Figure 2-8. Installshield Wizard Completed dialog box

12. Click **Finish**.

INSTALLING WESTLAW CASE NOTEBOOK REPOSITORY ON AN EXISTING SQL SERVER

Case Notebook Repository uses SQL Server for data storage and retrieval. You have several options for installing Case Notebook Repository:

- If you have your own installation of Microsoft SQL Server, it can be used for Case Notebook Repository using a default or named instance. If you run the installer that includes both SQL server and Case Notebook Repository on a server running Microsoft SQL Server, a new instance of Microsoft SQL Server 2005 Express is installed.
- If you do not have Microsoft SQL Server installed, you can install the download that includes both SQL Server and Case Notebook Repository.

To install Case Notebook Repository on an existing SQL Server, complete these steps:

1. Install Case Notebook Administration on the server where SQL is installed.
2. On the **Repository** menu, click **Close** to close any open repositories.
3. On the **Repository** menu, click **Install SQL Server Repository**. The **Install SQL Server Repository** dialog box is displayed (Figure 2-9).

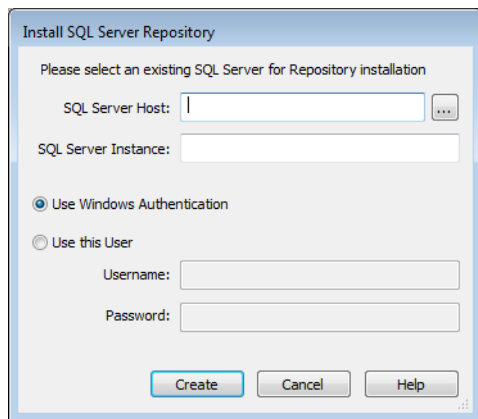


Figure 2-9. Install SQL Server Repository dialog box

4. Click the ellipsis button (**...**) next to the **SQL Server Host** box to display the **Browse for Folder** dialog box.
5. Click the repository server and click **OK**.
6. Type the name of the SQL Server instance in the **SQL Server Instance** box. This name must match what you chose at installation.
7. By default, **Use Windows Authentication** is selected. Use this setting if you want your username and password to authenticate the repository. If you want to allow SQL Server access for another user on a Windows Server, click **Use this User** and type the username and password for that user in the **Username** and **Password** boxes.
8. Click **Create**.

MAXIMIZING FULL TEXT SEARCH PERFORMANCE

To maximize the speed when you perform a Full Text Search in Case Notebook, it is recommended that you run SQL Server under a specific domain account.

To set up SQL Server to run under a specific account, follow the procedure described below. The procedure assumes the following:

- You have a server, referred to as MyServer in the procedure below.
- You have installed an instance of SQL Server, referred to as SQL Server (MyInstance), on MyServer to be used as a repository for Case Notebook. The Case Notebook Repository installer automatically names the instance WESTREPOSITORY.
- You have a second server, referred to as MyFileServer.
- You have a public folder on MyFileServer, referred to as MyShare, which is the location of your secure case files.
- You have a local user, referred to as MyUser, which uses the same username and password on MyServer and MyFileServer.

or

You have a domain, referred to as MYDOMAIN, and a domain user, referred to as MyUser.

- MyUser has read-only access to MyShare.
- It is recommended that you dedicate MyUser to the SQL Server (MyInstance) service and the MyShare folder. If you add MyUser to another group, you may restrict the access to MyShare.

Note: Before you begin the following procedure, you must shut down all clients that are accessing SQL Server (MyInstance). If you do not shut down all clients, the service will stop and the clients will lose their connection.

To set up SQL Server (MyInstance) to run under the MyUser account, complete these steps:

1. Log on to MyServer as an administrator.
2. Add MyUser to the user accounts for MyServer. If you are working on a domain, add MYDOMAIN/MyUser.
3. To grant a level of access for MyUser on MyServer, click **Other** and then click a group on the list similar to the following: **SQLServer2005MSSQLUser\$MyServer\$MyInstance**.
Note: You may be able see the entire name of the group more clearly under Groups on the Local Users and Groups page.
4. Open SQL Server Configuration Manager.
5. In the left pane, double-click **SQL Server 2005 Services**.
6. In the right pane, right-click the appropriate service, such as **SQL Server (MyInstance)**, click **Stop** on the menu, and wait for the service to stop.
7. Right-click the appropriate service, such as **SQL Server (MyInstance)**, and click **Properties** on the menu. The **SQL Server Properties** dialog box is displayed.
8. On the **Log On** tab, click **This Account** and type the username and password for MyUser in the appropriate boxes. You must update this information if your password has expired.
9. Click **OK**.
10. Right-click the appropriate service, such as **SQL Server (MyInstance)**, and click **Start** on the menu. The service restarts.

Installing Westlaw Case Notebook Administration

Once you have installed Case Notebook Repository (or if you already have Microsoft SQL Server 2005 installed on your computer), you can install Case Notebook Administration on each Case Notebook administrator's computer.

To install Case Notebook Administration, complete these steps:

1. Click the link for Case Notebook Administration in the email sent to you from Thomson Reuters to display the Case Notebook Administration registration page.
2. Complete the registration form and click **Proceed to Download** at the bottom of the page.
3. At the next page, click **Proceed with Download** next to the option you want to install.
4. The InstallShield Wizard for Westlaw Case Notebook Admin dialog box is displayed (Figure 2-10).

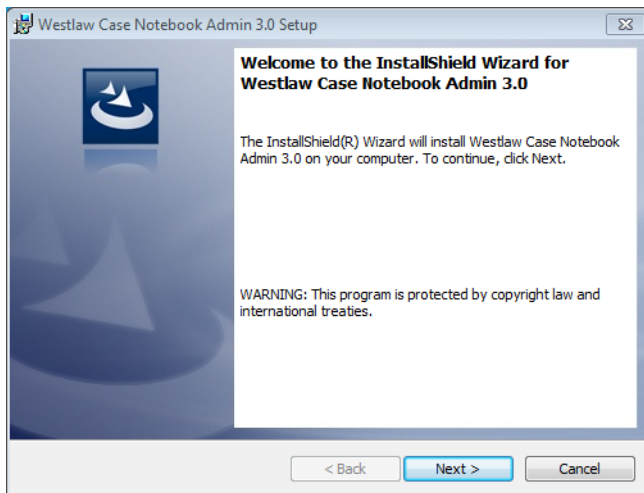


Figure 2-10. InstallShield Wizard for Westlaw Case Notebook Admin dialog box

5. Click **Next**. The License Agreement dialog box is displayed (Figure 2-11).

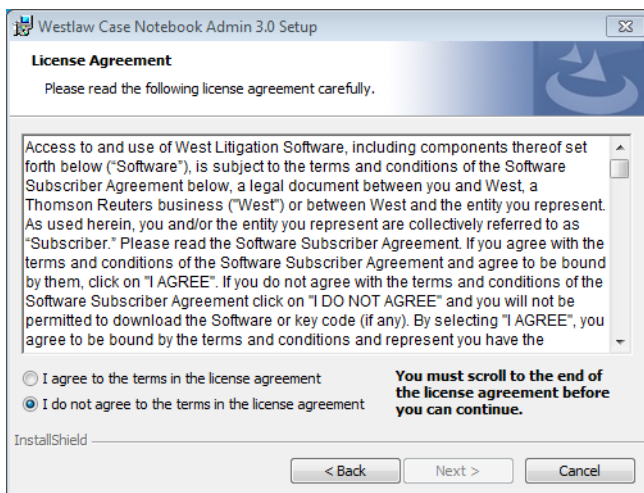


Figure 2-11. License Agreement dialog box

6. Scroll to the bottom of the license agreement as you read it, then click **I agree to the terms in the license agreement** and click **Next**.

The Readme Information dialog box is displayed (Figure 2-12).

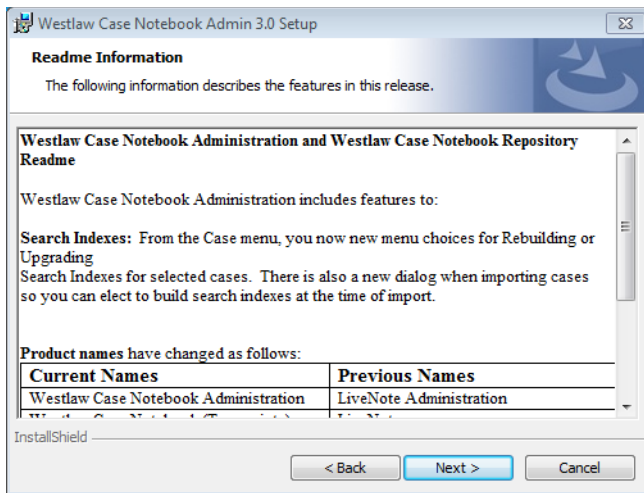


Figure 2-12. Readme Information dialog box

7. After reading the information, click **Next**. The **Customer Information** dialog box is displayed (Figure 2-13).

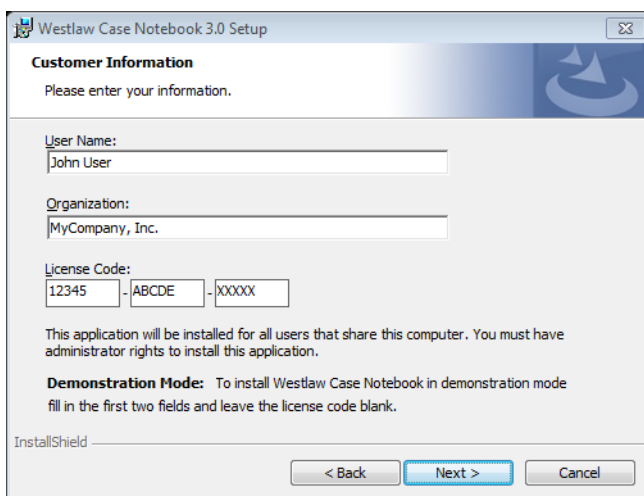


Figure 2-13. Customer Information dialog box

8. Type your name, organization, and license code in the **User Name**, **Organization**, and **License Code** boxes, and then click **Next**. If you previously installed Case Notebook Repository, the information is automatically entered.

The Destination Folder dialog box is displayed (Figure 2-14).

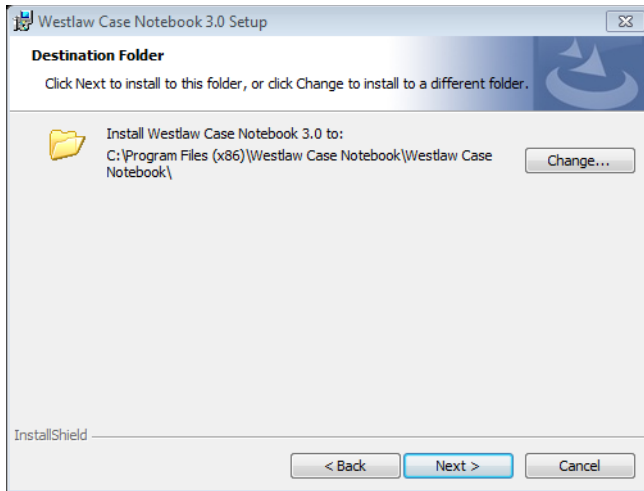


Figure 2-14. Destination Folder dialog box

9. Case Notebook Administration will be installed on your computer in the Program Files folder. Click **Next**. The Ready to Install the Program dialog box is displayed (Figure 2-15).

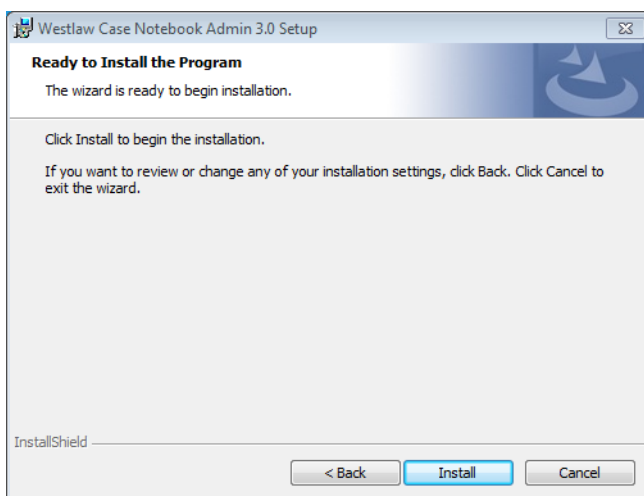


Figure 2-15. Ready to Install the Program dialog box

10. Click **Install** to begin the installation.

The **InstallShield Wizard Completed** dialog box is displayed when the installation is complete (Figure 2-16).

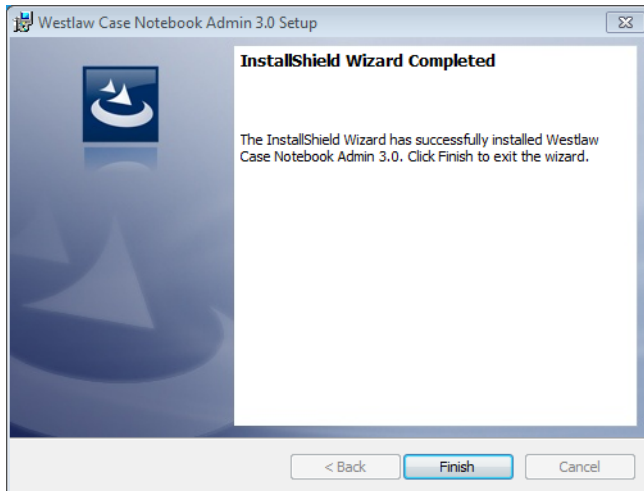


Figure 2-16. InstallShield Wizard Completed dialog box

11. Click **Finish**.
12. Repeat steps 1 through 11 for each Case Notebook administrator.

Note: When you install Case Notebook Administration, earlier versions are automatically uninstalled. To completely uninstall Case Notebook Administration, you must also uninstall Microsoft SQL Server 2005 Express if it was installed with Case Notebook Administration.

To access Case Notebook Administration, double-click the **Westlaw Case Notebook Administration** icon (📁) on your desktop.

Licensing the Westlaw Case Notebook Repository

After you install Case Notebook Repository and Case Notebook Administration, you must complete the licensing requirements for Case Notebook Repository before you can access Case Notebook Administration. To license Case Notebook Repository, complete these steps:

1. Access Case Notebook Administration. The **Repository License Installation** dialog box is displayed (Figure 2-17).

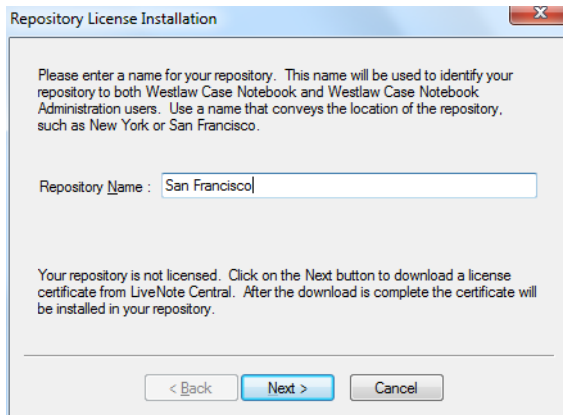


Figure 2-17. Repository License Installation dialog box

2. Type a name for the repository (for example, **San Francisco**) in the **Repository Name** box and click **Next**. The **Create an Administrator Account** dialog box is displayed (Figure 2-18).

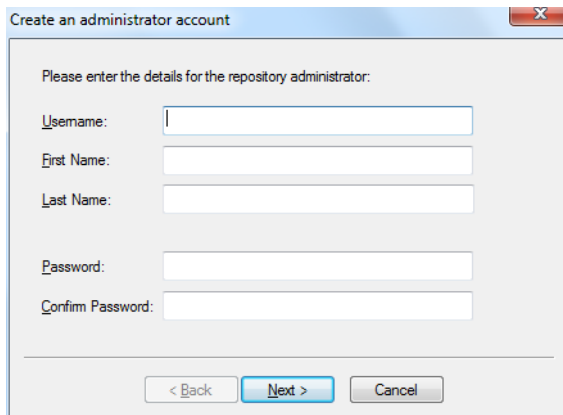


Figure 2-18. Create an Administrator Account dialog box

3. Type a username (for example, **Admin**) for the Case Notebook administrator in the **Username** box.
4. Type the Case Notebook administrator's first name in the **First Name** box.
5. Type the Case Notebook administrator's last name in the **Last Name** box.
6. Type the Case Notebook administrator's password in the **Password** and **Confirm Password** boxes.

Note: Note the username and password as they will be required later.

7. Click **Next**. The **Repository Licensing Complete** dialog box is displayed (Figure 2-19).

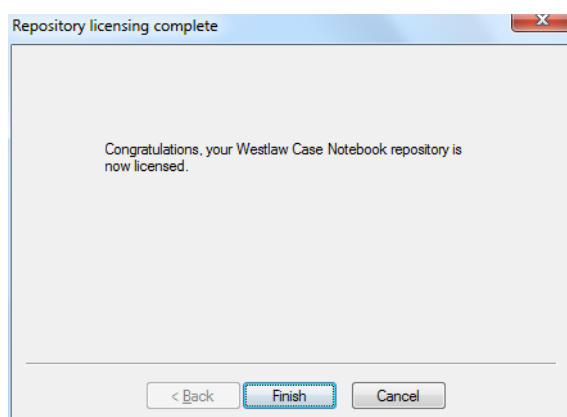


Figure 2-19. Repository Licensing Complete dialog box

8. Click **Finish**. The **Westlaw Case Notebook Administration** window is displayed.

Note: You can add additional administrators via Case Notebook Administration. For more information, see the *Westlaw Case Notebook Administration User Guide*.

It is suggested that you create a test case to determine the location of the case files and a test user to test whether the user can access the cases. For further information on creating cases and users, download a free copy of the *Westlaw Case Notebook Administration User Guide* at store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.

ADDING A WESTLAW CASE NOTEBOOK REPOSITORY MANUALLY

If Case Notebook Administration does not find the repository that you want to license, the **Add Repository Server** dialog box is displayed (Figure 2-20), and you must add the repository manually.

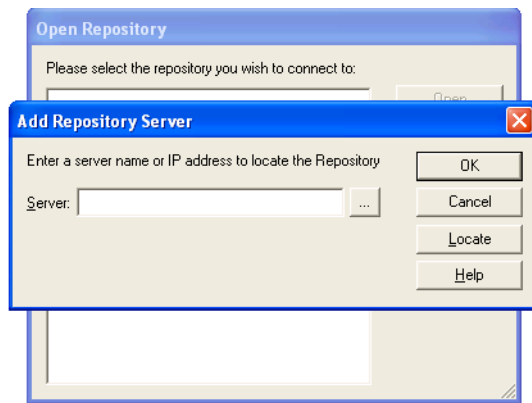


Figure 2-20. Add Repository Server dialog box

To add the repository manually, complete these steps:

1. Click the ellipsis button (...) in the **Add Repository Server** dialog box to display the **Browse for Folder** dialog box, or click **Locate** to have Case Notebook Administration search for the server.
2. Click the repository server and click **OK**. The **Add Repository Server** dialog box is redisplayed.
3. Click **OK**. A message stating that a connection to the repository was successfully established is displayed.
4. Click **OK**. The repository is listed in the **Open Repository** dialog box.
5. Click the repository you want to open and click **Open**. The **Create an Administrator Account** dialog box is displayed.
6. Follow steps 3 through 8 under "Licensing the Westlaw Case Notebook Repository" on page 17.

If you created your own SQL Server instance, you can type the server name and SQL instance in the **Server** box (for example, server name\instance name).

Installing Westlaw Case Notebook

Important: If you are upgrading a version of Case Notebook that was published for Citrix, the upgraded application needs to be published again following the upgrade.

1. Click the link for Case Notebook in the email sent to you from Thomson Reuters to display the Case Notebook registration page.
2. Complete the registration form and click **Proceed with Download**.
3. At the next page, click **Proceed with Download** next to the option you want to install.
4. If you do not have Microsoft SQL Server installed on your computer, the installer displays a dialog box indicating that Microsoft SQL Server 2005 Express SP4 will be installed (Figure 2-21).

Note: If you are installing the version without Microsoft SQL Server, the **InstallShield Wizard for Westlaw Case Notebook** dialog box is not displayed (Figure 2-22). Skip to step 6.

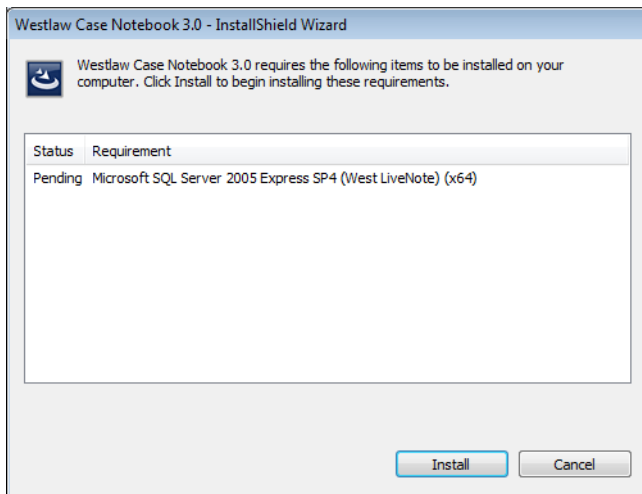


Figure 2-21. InstallShield Wizard dialog box

5. Click **Install**.

After Microsoft SQL Server 2005 Express SP4 is installed, the InstallShield Wizard for Westlaw Case Notebook dialog box is displayed (Figure 2-22).

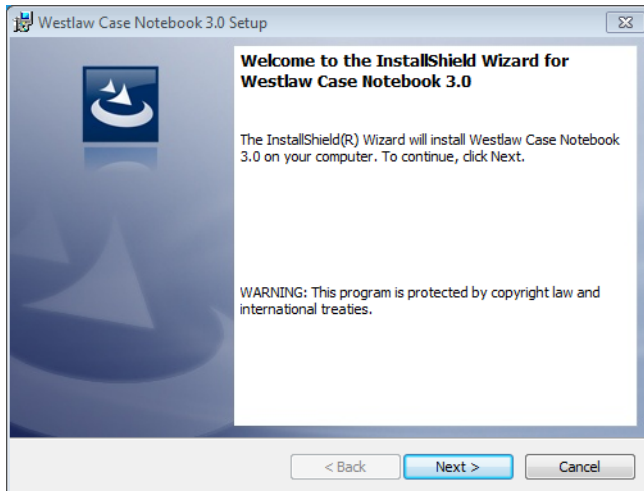


Figure 2-22. InstallShield Wizard for Westlaw Case Notebook dialog box

6. Click **Next**. The License Agreement dialog box is displayed (Figure 2-23).

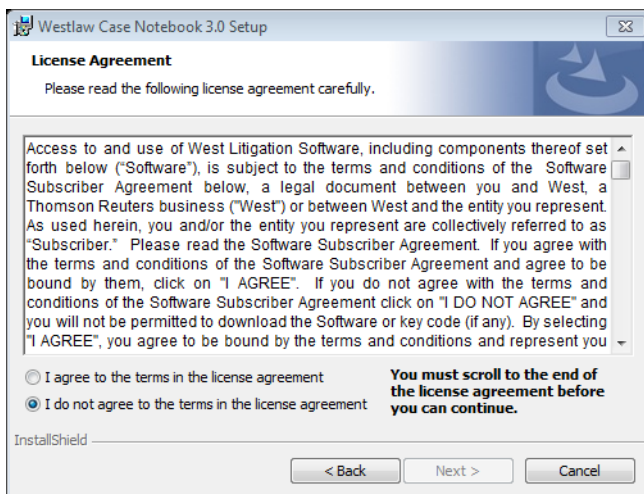


Figure 2-23. License Agreement dialog box

7. Scroll to the bottom of the license agreement as you read it, then click **I agree to the terms in the license agreement** and click **Next**.

The **Readme Information** dialog box is displayed (Figure 2-24).

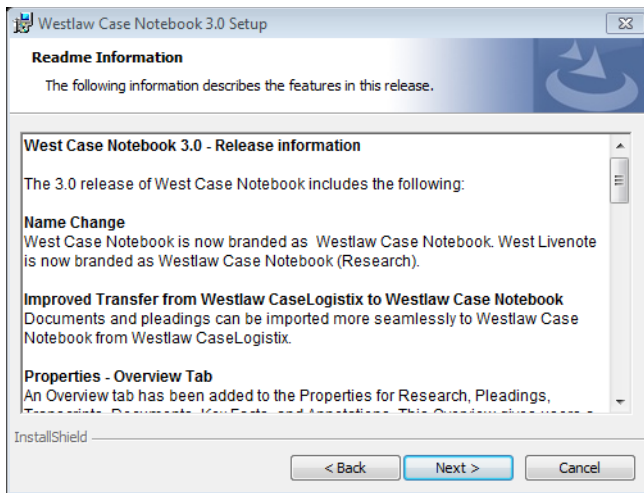


Figure 2-24. Readme Information dialog box

8. After reading the information in the **Readme Information** dialog box, click **Next**. The **Customer Information** dialog box is displayed (Figure 2-25).

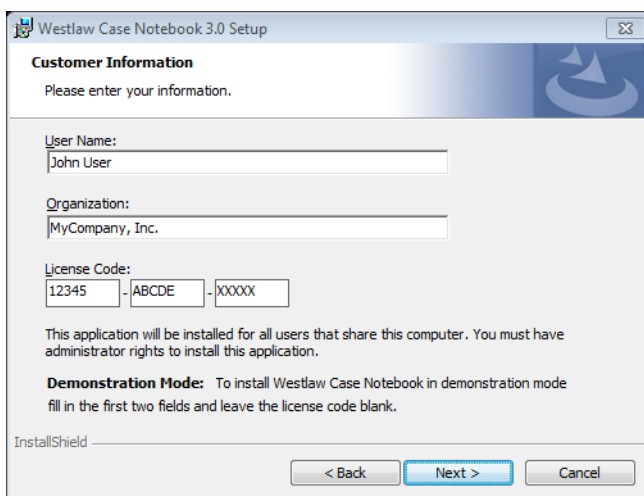


Figure 2-25. Customer Information dialog box

9. Type your name, organization, and license code in the **User Name**, **Organization**, and **License Code** boxes, and then click **Next**.

Note: If you are upgrading to Case Notebook 3.0 from an earlier version, you must enter a Case Notebook 3.0 license code or the program will run in demonstration mode.

The Destination Folder dialog box is displayed (Figure 2-26).

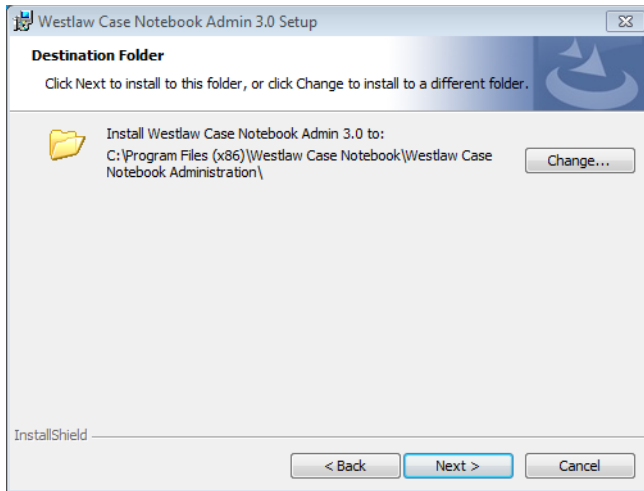


Figure 2-26. Destination Folder dialog box

10. Case Notebook will be installed on your computer in the Program Files folder. Click **Next**. The **Ready to Install the Program** dialog box is displayed (Figure 2-27).

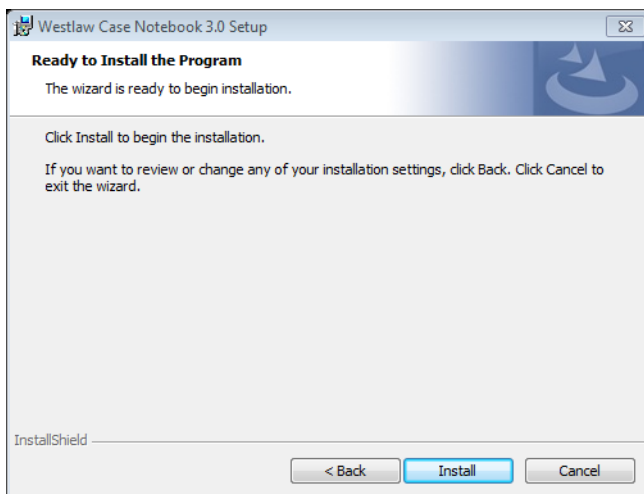


Figure 2-27. Ready to Install the Program dialog box

11. Click **Install** to begin the installation.

The **InstallShield Wizard Completed** dialog box is displayed when the installation is complete (Figure 2-28).

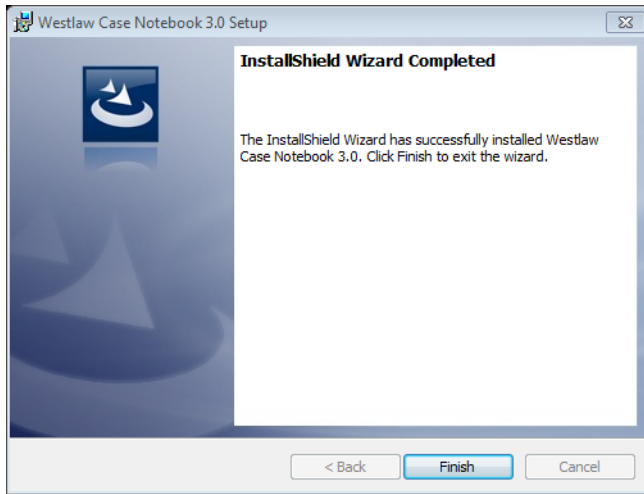


Figure 2-28. Installshield Wizard Completed dialog box

12. Click **Finish**.

Note: When you install Case Notebook, earlier versions are automatically uninstalled. To completely uninstall Case Notebook, you must also uninstall Microsoft SQL Server 2005 Express if it was installed with Case Notebook.

To access Case Notebook, double-click the **Westlaw Case Notebook** icon  on your desktop.

3 Upgrading and Importing Repositories

Upgrading Repository Version 1.x or 2.x to Westlaw Case Notebook Repository 3.0

Before opening a version 1.x or 2.x repository in Case Notebook Administration 3.0, it is strongly recommended that you back up your current repository database. Once you open the version 1.x or 2.x repository, the repository is upgraded to version 3.0.

When you upgrade a repository, the information in your cases does not change, and you can still access cases created in version 1.x or 2.x using previous versions of the software. However, if you open a case with Case Notebook 3.0, it is automatically upgraded to version 3.

Note: For Case Notebook Administration to validate your license, you must be connected to the Internet while upgrading the repository.

LIMITATIONS ON COMPUTER PERFORMANCE

The following may affect your computer's performance during an upgrade:

- Importing many large cases at one time (for example, a repository that includes 10 cases with more than 500 exhibits).
- Upgrading a case from a West LiveNote version earlier than version 1 or a LiveNote version earlier than version 10, particularly cases with many exhibits.
- Upgrading the source and destination files on a mapped network drive.
- Upgrading from a computer on which source files are not stored.

Opening Version 1.x or 2.x Cases in Westlaw Case Notebook 3.0

When you open a case created in version 1.x or 2.x using Case Notebook 3.0, Case Notebook automatically backs up your case information and upgrades the case to version 3.0. Additionally, when you replicate a case to the network you are prompted to upgrade the case to version 3.0.

Local case information for version 3.0 is stored in the following location:

- **Windows XP:** %ALLUSERSPROFILE%\Documents\Westlaw Case Notebook\Cases\Upgrade Backup
- **Windows Vista and Windows 7:** %PUBLIC%\Documents\Westlaw Case Notebook\Cases\Upgrade Backup

Secure case information for version 3.0 is stored in the folder that contains the SQL Server instance:

- C:\Program Files\Microsoft SQL Server\MSSQL.X\MSSQL\Backup, where X is the variable for the instance name (for example, MSSQL.1)

Importing Earlier Versions of LiveNote Repository

The following conditions apply when importing LiveNote Repository version 8, 9, or 10:

- When you import an earlier repository, it is added to the new repository; it does not replace the new repository. Therefore, the repositories are separate and may be concurrent. You do not need to restart the server after updating a repository even if the repository is on a WAN.

IMPORTING LIVENOTE REPOSITORY VERSION 9 OR 10

To import LiveNote Repository version 9 or 10 to Case Notebook Repository, complete these steps:

1. Access Case Notebook Administration and open Case Notebook Repository.
2. On the **Repository** menu, click **Import Repository (version 9 or 10)**. The Repository Import Wizard displays the **Available Repositories** dialog box (Figure 3-1).

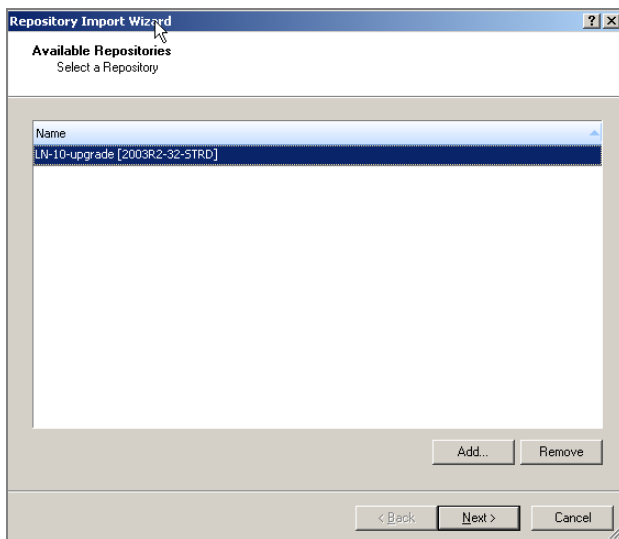


Figure 3-1. Repository Import Wizard–Available Repositories dialog box

- To add a repository to the list, click **Add**. The **Add Repository Server** dialog box is displayed (Figure 3-2).

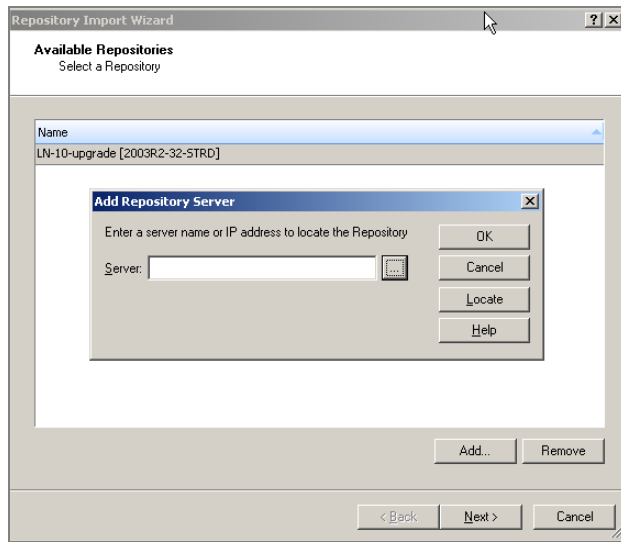


Figure 3-2. Add Repository Server dialog box

- To access a repository, you can:
 - Type the server name in the Server box.
 - Click the ellipsis button (...) to browse for a repository.
 - Click **Locate** to search for a repository.

Note: To remove a repository from the list, select it and click **Remove**. The repository is not permanently deleted.
- Click the repository you want to import. You can only import one repository at a time.
- Click **Next**. The **Administrator login** dialog box is displayed.

7. Type your username and password in the **Username** and **Password** boxes, and then click **Login**. The Repository Import Wizard displays the **Available Cases** dialog box (Figure 3-3).

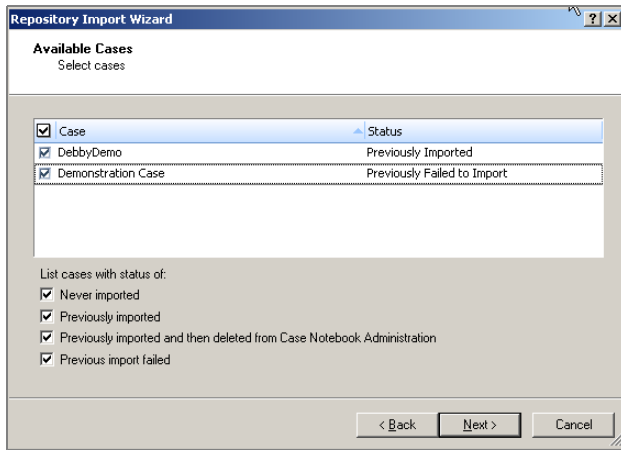


Figure 3-3. Repository Import Wizard–Available Cases dialog box

8. Select the status check boxes to determine which cases you want to import.

Note: If you import a case, then delete the case, then import it again by selecting the **Previously imported and then deleted from Case Notebook Administration** check box, the case is imported as a new case. However, if you import a case and then import it again without having deleted the first case, you will have two cases with the same name. To change the name, locate the case using Windows Explorer, then right-click the case and click **Edit** to change the name.

When you import a duplicate case, the system automatically modifies the MDF and LNS file locations to indicate one is a copy. For example, \\2003R2-32-STRD\upgraded-case\MyCase.LNS is the location of the original case and \\2003R2-32-STRD\upgraded-case\MYCase~1.LNS is the location of the newly imported case. You can delete the old case without affecting the new case.

9. Select the checkbox next to each case you want to import, or right-click to select or deselect cases by groups.
10. Click the **Case** or **Status** headings to sort the cases in ascending or descending order, if desired.
11. Click **Next**. The Repository Import Wizard displays the **Search Index Build** dialog box (Figure 3-5).

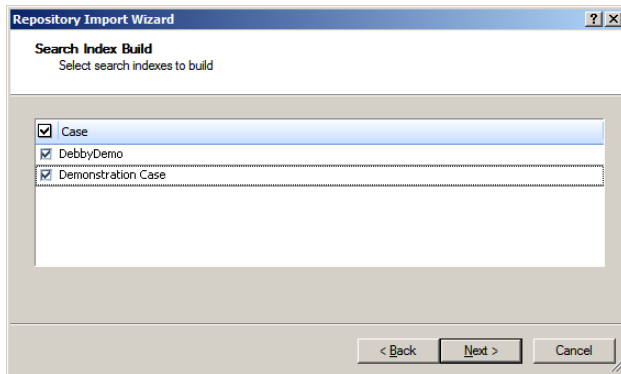


Figure 3-4. Repository Import Wizard–Import Options dialog box

12. Select the checkbox next to each case for which you want to build an index during the import, or right-click to select or deselect cases by groups.

13. Click the **Case** heading to sort the cases in ascending or descending order, if desired.
14. Click **Next**. The Repository Import Wizard displays the **Import Options** dialog box (Figure 3-5).

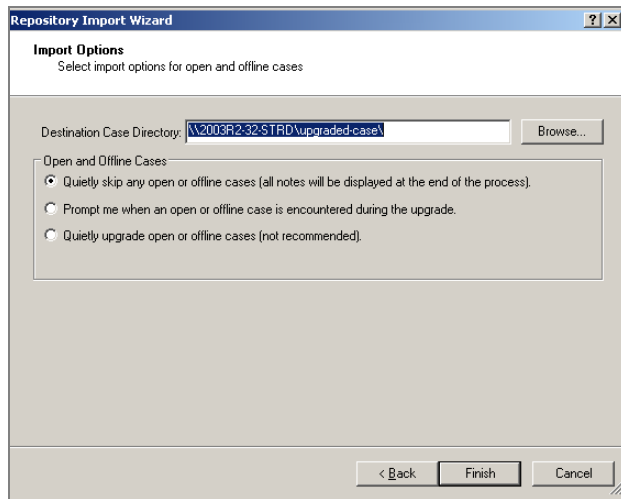


Figure 3-5. Repository Import Wizard–Import Options dialog box

15. Accept the destination directory or click **Browse** to select a different directory.
16. Click one of the following:
 - **Quietly skip any open or offline cases (all notes will be displayed at the end of the process)** to skip importing cases that are open or offline.
 - **Prompt me when an open or offline case is encountered during the upgrade** to receive notification when a case you intend to upgrade is open or offline. You must be present if you are importing a case using this choice because the system pauses and waits for a response.
 - **Quietly upgrade open and offline cases (not recommended)** to upgrade open and offline cases without being notified. This option should only be used if cases are inappropriately flagged as open.

17. Click **Finish**. The **Import Messages** dialog box is displayed with a list of messages about the update process (Figure 3-6).

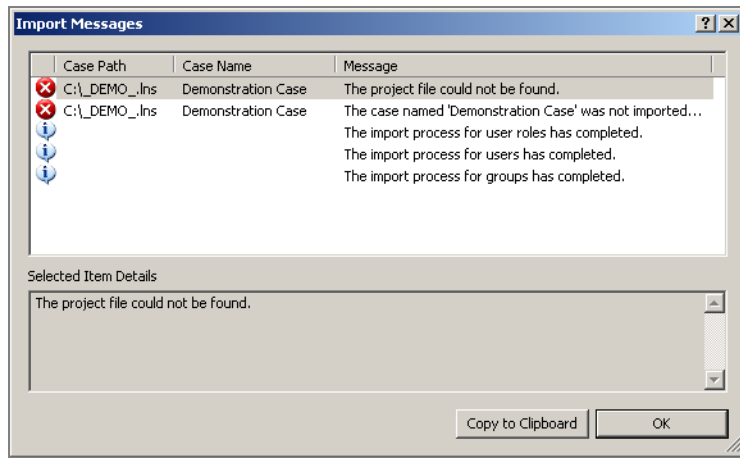


Figure 3-6. Import Messages dialog box

Note: To save a copy of the messages, click **Copy to Clipboard** to copy all the messages, then paste them into another program. The option to copy these messages is only available at this point. You cannot retrieve them later.

When the system cannot import a file, it attempts to handle the situation in the most useful method. Here are examples of how it handles various situations:

- When a transcript cannot be found, a message is displayed in the dialog box and a blank e-transcript is created in its place to indicate that a transcript was not imported.
- When a linked exhibit cannot be found, a message is displayed in the dialog box and an RTF is created to indicate that there was an exhibit but that it was not imported. The RTF will state, "This file was not found when upgrading from an earlier version of the software."
- The system imports video sync information, but does not check for the existence of video.
- When importing a local case (.lns file) using Case Notebook Administration or Case Notebook, the same conditions and messages as above apply.

18. Click **OK**.

Additional Information

When an invalid transcript date is received, the import continues. The procedure attempts to estimate a date. For example, if the month is 13, the system calculates that it is January (12 months in a year plus one additional month). If the system needs to correct a date, it notes it on the friendly Message Log and supplies details regarding the correction.

IMPORTING LIVENOTE REPOSITORY VERSION 8.X

To import LiveNote Repository version 8.x to Case Notebook Repository, complete these steps:

1. Access Case Notebook Administration on the computer with LiveNote Administration version 8.x. The **Administrator Login for [repository name]** dialog box is displayed.
2. Type your username and password in the **Username** and **Password** boxes, and then click **Login**. The **Westlaw Case Notebook Administration** window is displayed.
3. On the **Repository** menu, click **Import Repository (version 8)**. The **Select the Repository (Secure Case Folder) to Import** dialog box is displayed.
4. Click the `sc.lnr` file and click **Open**. All users and groups that are not already in the repository are imported. If case information is stored in the `sc.lnr` file, the **Select Cases to Import** dialog box is displayed (Figure 3-7).

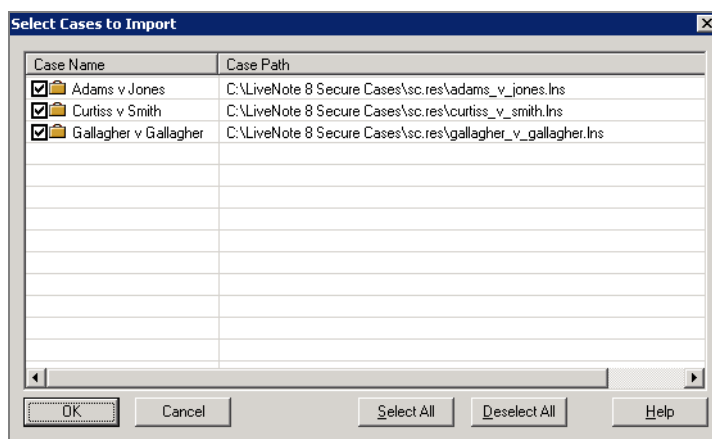


Figure 3-7. Select Cases to Import dialog box

5. By default, all cases are selected. To exclude a case from the upgrade, clear its check box.
6. Click **OK**. If the cases contain annotations, the **Select an Owner for the Annotations** dialog box is displayed.
7. Select an owner and click **OK**. The **Select Case Import Destination** dialog box is displayed.
8. Click **Browse**. The **Browse for Folder** dialog box is displayed.
9. Click a destination directory for the upgraded cases and click **OK**. The **Select Case Import Destination** dialog box is redisplayed.
10. Click **OK**. Imported cases, users, and groups are listed on the **Cases**, **Users**, and **Groups** tabs respectively.

Send to CaseMap from LiveNote: Link Conversion Utility

If you sent transcript annotations from LiveNote version 8.3 or later to CaseMap, you must use the Link Conversion Utility to view the full annotated transcript in Case Notebook version 3.0. Before you use this utility, it is recommended that you upgrade your LiveNote version 8.3 or later cases to Case Notebook version 3.0 cases.

To download the utility, go to store.westlaw.com/software/case-notebook/cm-livenote-utility/default.aspx and click **Proceed with Download**. For information on using the utility, download the *Send to CaseMap from LiveNote: Link Conversion Utility* guide at store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.

4 Performing a Silent Installation

It is recommended that an experienced information technology specialist execute a silent installation.

Case Notebook can be installed silently from the Windows command prompt using various parameters to specify installation details (for example, install directory, user name, company name, and so on). The installation parameters must be specified carefully.

Note: If a parameter value contains spaces, you must escape each side of the value with a backslash and double quotes (\").

You do not need to uninstall LiveNote version 9 or version 10 before installing Case Notebook. The silent installation allows you to license multiple workstations at once. The silent installation uses the Case Notebook installer.

The following installation parameters are supported:

Parameter	Specifies
USERNAME	Username to register during the client installation.
COMPANYNAME	Company name to register during the client installation.
LICENSE_CODE	Case Notebook client license code.
INSTALLDIR	Local directory where Case Notebook should be installed.

The silent installation is designated using the /S and /V switches, and all of the installation parameters must be passed within the "/qn ..." switch. In the example below, the installation parameters are shown in blue:

```
WLCNBSQL32-3.0.exe /S /V"/qn LICENSE_CODE=CZZQ3-3JFHG-XXXXX  
INSTALLDIR=C:\TEST USERNAME=QA-TEST COMPANYNAME=\"THOMSON REUTERS\""
```

Where WLCNBSQL32-3.0.exe is the installer for a specific version of Case Notebook (your version may vary).

Note: For all installation types, the silent installation command must be in the exact form of `installer.exe /S /V"/qn <parameters>`. Parameters and values can be used in any order, but there should be no space between the /V and " characters, and no space between the " and /qn characters.

PERFORMING A SILENT UPGRADE OF YOUR LICENSE CODE

To upgrade your license code in silent mode, enter the following at a command prompt:

```
updatewlnlicense.exe CNXXX-3JYYY-0YZZZ
```

Where CNXXX-3JYYY-0YZZZ is the Case Notebook license code.

Note: The executable can be found in the Case Notebook installation directory. At the command prompt, you have to provide the full path to the executable or run the command from the directory where the executable is located.

Performing a Silent Uninstallation

To run the silent uninstallation, type the following command at a command prompt:

Westlaw Case Notebook:

```
Msiexec.exe /x{DF611439-1E59-4ECF-BDA5-2A25AA15A5AC} /qb
```

Westlaw Case Notebook without SQL:

```
Msiexec.exe /x{FECAD572-C84C-4D2E-9042-C0D2E1C19B78} /qb
```

Westlaw Case Notebook Administration:

```
Msiexec.exe /x{39DD4F42-D9C0-4D8D-ACB2-85CC1A459EAC} /qb
```

Westlaw Case Notebook Administration and Westlaw Case Notebook Repository:

```
Msiexec.exe /x{4B67042C-114F-482A-8934-27885032C562} /qb
```

RAS:

```
Instance 0: Msiexec.exe /x{16A2AFA3-3F42-4E5F-B564-1D15371ED1C2} /qb
```

```
Instance 1: Msiexec.exe /x{743B7FB6-37D3-4D0C-963F-ADAE6C47EA13} /qb
```

```
Instance 2: Msiexec.exe /x{C02DB329-A790-4884-B2F2-30FE92C46189} /qb
```

```
Instance 3: Msiexec.exe /x{31BA15ED-E56D-4B89-A35C-BA96DAC9178A} /qb
```

```
Instance 4: Msiexec.exe /x{E48AED9C-7EBB-4DE1-91AA-B2CC41BB5B68} /qb
```

```
Instance 5: Msiexec.exe /x{6E907E24-78CA-4F84-8993-3C4DBBD1F212} /qb
```

```
Instance 6: Msiexec.exe /x{FEF90B04-9B05-4532-8114-0C1AA2EB43BA} /qb
```

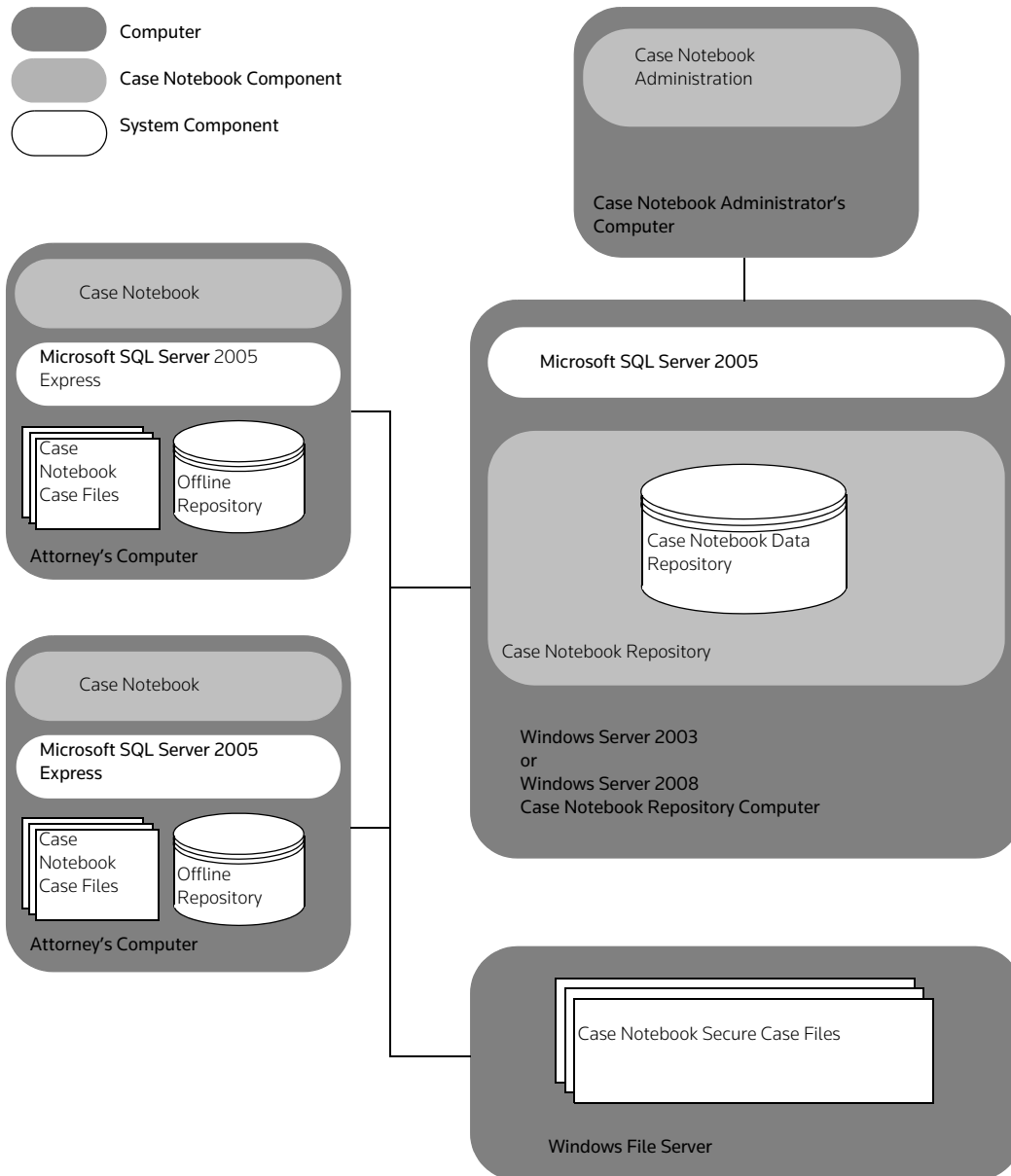
```
Instance 7: Msiexec.exe /x{90D15791-869F-4FDC-82E5-B8E66716DE0F} /qb
```

```
Instance 8: Msiexec.exe /x{B4467B1B-B5AD-48FE-8C58-892D34B25910} /qb
```

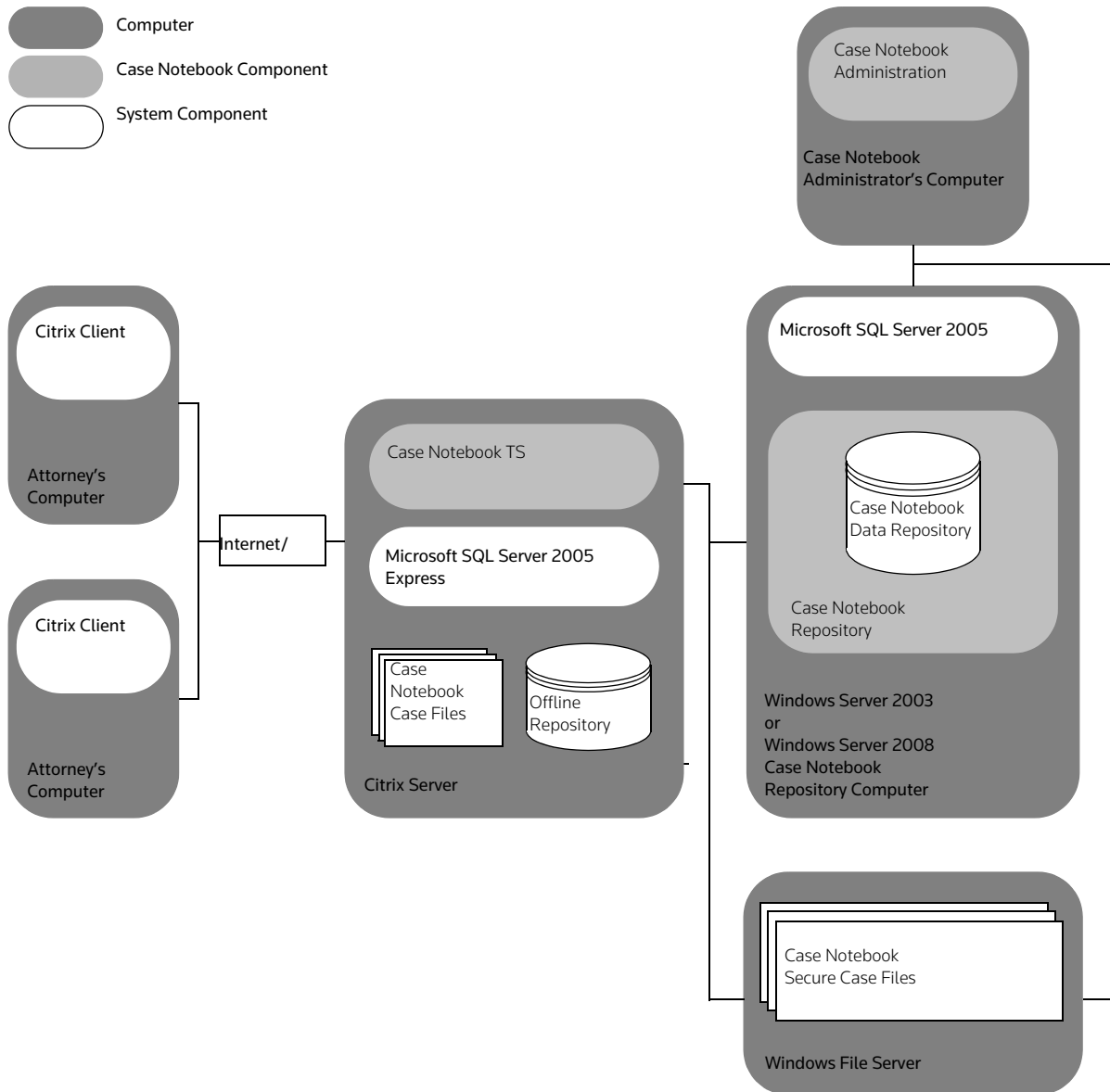
```
Instance 9: Msiexec.exe /x{2BCE71C0-0C21-4C5D-8C05-99EDC1DC6FEC} /qb
```

If you want to perform a silent uninstallation for a different version of these products, contact Customer Technical Support.

Appendix A: Components of the Westlaw Case Notebook Application Suite



Appendix B: Components of Westlaw Case Notebook Terminal Service



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