

Case Notebook eSend Installation and Quick Reference Guide (Open Text eDOCS DM 5.3)

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For assistance using Case Notebook, call 1-800-290-9378 or email westlaw.softwaresupport@thomsonreuters.com.

For free reference materials, visit <http://legalsolutions.thomsonreuters.com/law-products/support/user-guides>.

Our products also contain comprehensive, searchable instruction available via the **Help** menu in the application.

Case Notebook eSEND allows you to send documents, pleadings, and research documents to Case Notebook using Open Text eDOCS DM. To install Case Notebook eSEND, you must have Case Notebook installed on the same computer as the Open Text eDOCS DM desktop client or integrated Microsoft Outlook client.

Installing Westlaw Case Notebook eSEND

To install Case Notebook eSEND, complete these steps:

1. Go to store.westlaw.com/software/eSend/default.aspx. The **How to download Case Notebook eSEND** page is displayed.
2. Select one of the following options:
 - Case Notebook eSEND software for 32-bit eDOCS systems.
 - Case Notebook eSEND software for 64-bit eDOCS systems.

Important! Determine if your version of eDOCS is 32-bit or 64-bit and select the version of the eSEND file which is the same 32 or 64-bit as your eDOCS system (not necessarily the same as the Operating System).

3. Click **Proceed with Download** to download the **WLNCNB_eSEND.zip** file on your computer. The zip file contains two files i.e. **.msi** and **.exe**.
4. Open the **WLNCNB_eSEND.zip** file and save BOTH **.exe** and **.msi** in the same location.
5. Double click the **.msi** file to start the installation process.

The **Case Notebook eSEND Setup Wizard** dialog box is displayed (Figure 1).

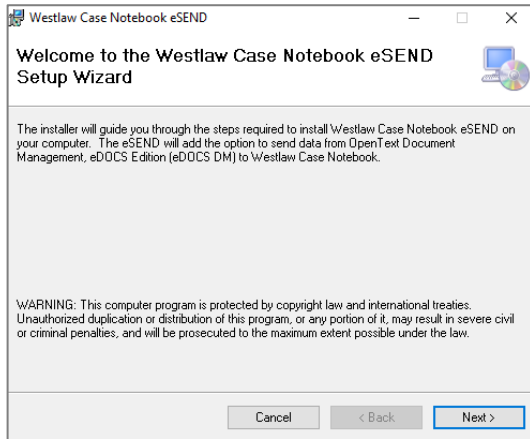


Figure 1. Case Notebook eSEND Setup Wizard dialog box

6. Click **Next**. The **Select Installation Folder** dialog box is displayed (Figure 2).

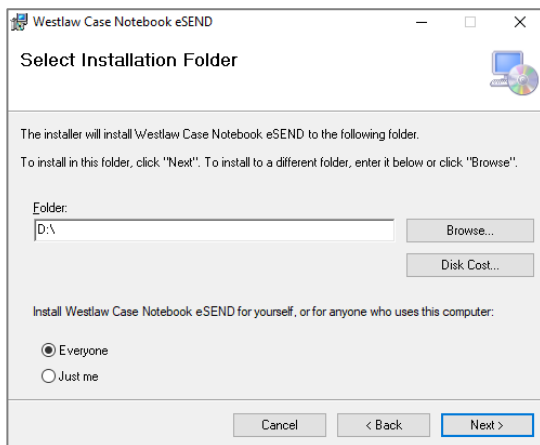


Figure 2. Select Installation Folder dialog box

7. Click **Next**. The **License Agreement** dialog box is displayed (Figure 3). **I Do Not Agree** is selected by default.

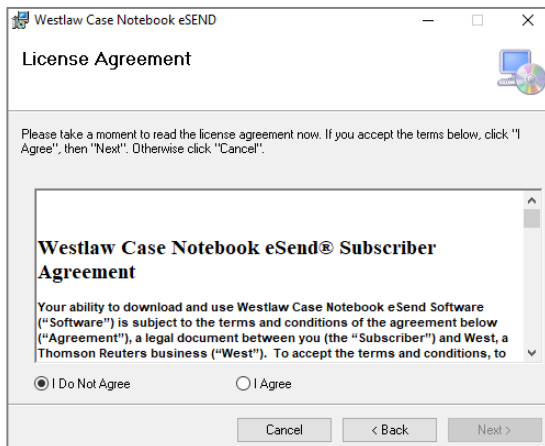


Figure 3. License Agreement dialog box

8. Scroll to the bottom of the license agreement as you read it, then click **I Agree** and click **Next**. The **Confirm Installation** dialog box is displayed (Figure 4).

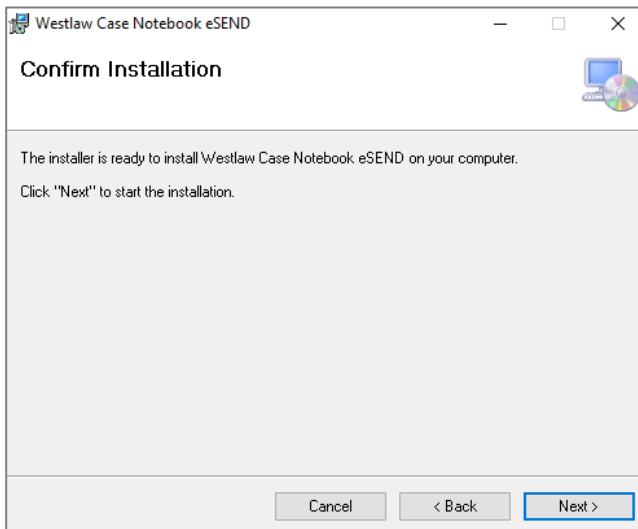


Figure 4. Confirm Installation dialog box

9. Click **Next**. The **Installing Westlaw Case Notebook eSend** (Figure 5) dialog box is displayed.

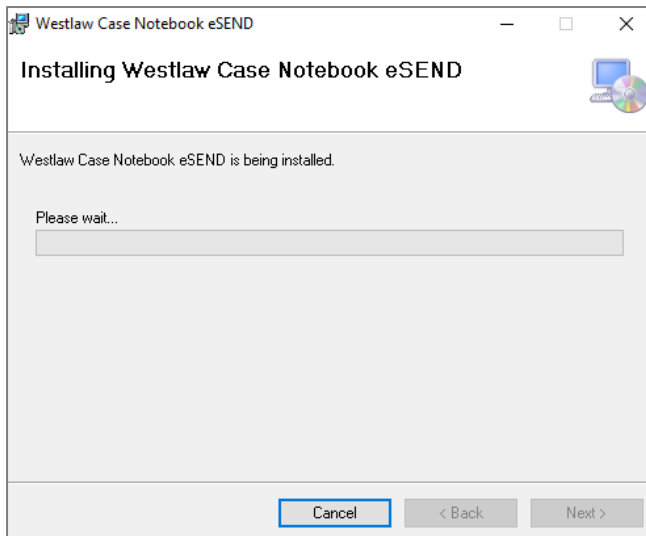


Figure 5. Installing Westlaw Case Notebook eSend dialog box

10. Click Close on the **Installation Complete** dialog box (Figure 6) after the installation is complete.

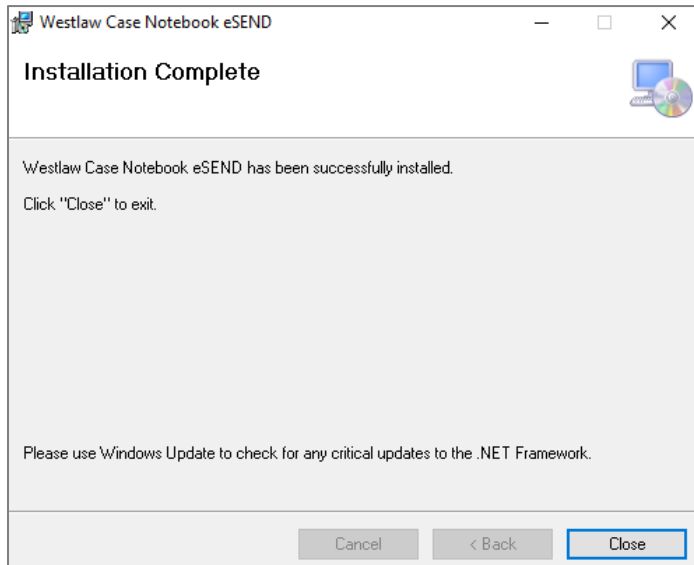


Figure 6. Installation Complete dialog box

Using Case Notebook eSEND in the Windows Explorer DM Extension

To send a document, pleading, or research document from the eDOCSWindows® Explorer DM Extension to Case Notebook, complete these steps:

1. Access Windows Explorer DM Extension.
2. Right-click the document, pleading, or research document you want to send to Case Notebook and click **Send to Case Notebook as Document**, **Send to Case Notebook as Pleading**, or **Send to Case Notebook as Research** on the menu (Figure 7).

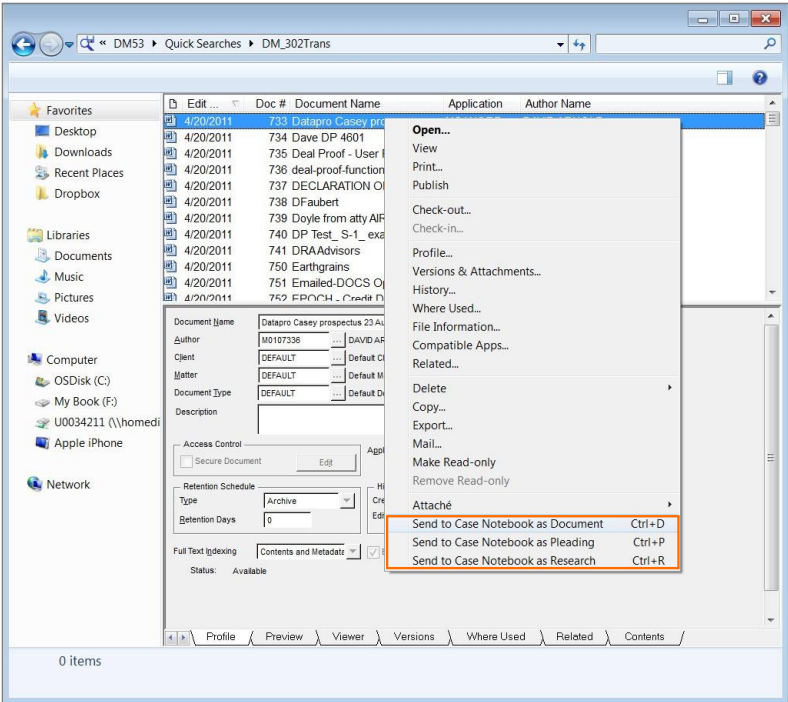


Figure 7. Windows Explorer DM window

The Data Import Wizard–Load Files dialog box is displayed (Figure 8).

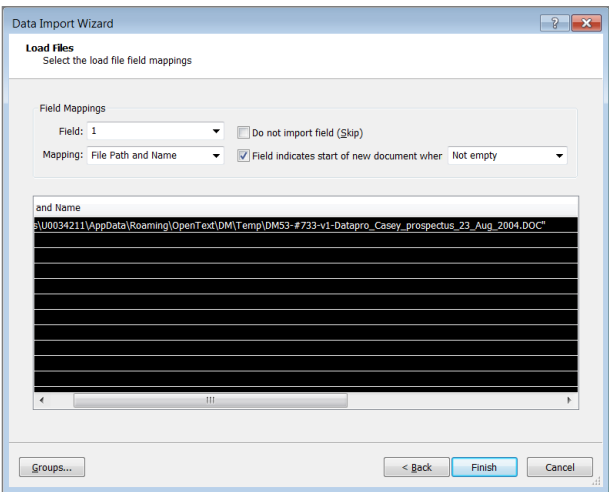


Figure 8. Data Import Wizard–Load Files dialog box

3. Click **Finish**. Case Notebook opens with the document, pleading, or research document listed under Documents, Pleadings, or Research in the left pane and the text of the document, pleading, or research document displayed in the right pane (Figure 9).

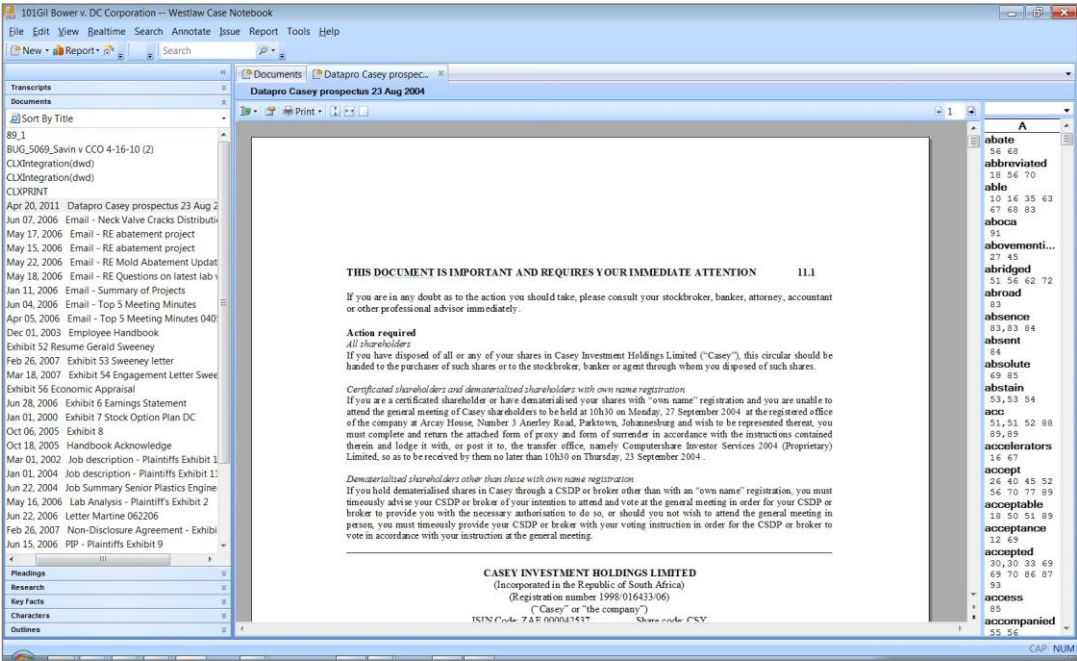


Figure 9. Document in Case Notebook

Using Case Notebook eSEND with the Outlook DM Extension

To send a document, pleading or research document from the eDOCS Outlook DM Extension to Case Notebook, complete these steps:

1. Access Outlook.
2. In the DM list, right-click the document, pleading, or research document you want to send to Case Notebook and click **Send to Case Notebook as Document**, **Send to Case Notebook as Pleading**, or **Send to Case Notebook as Research** on the menu (Figure 10).

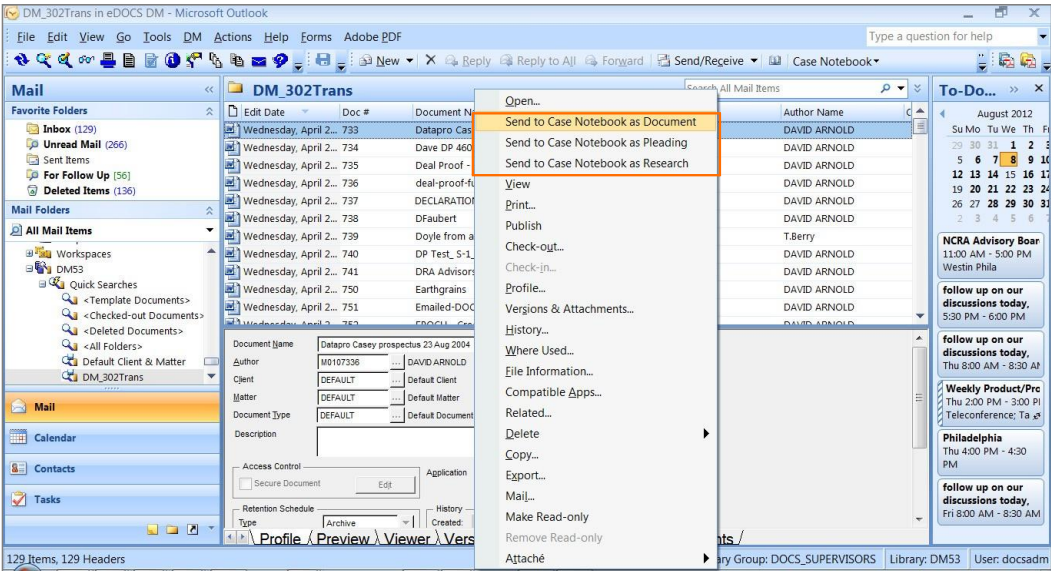


Figure 10. Outlook DM extension

The Data Import Wizard–Load Files dialog box is displayed (Figure 11).

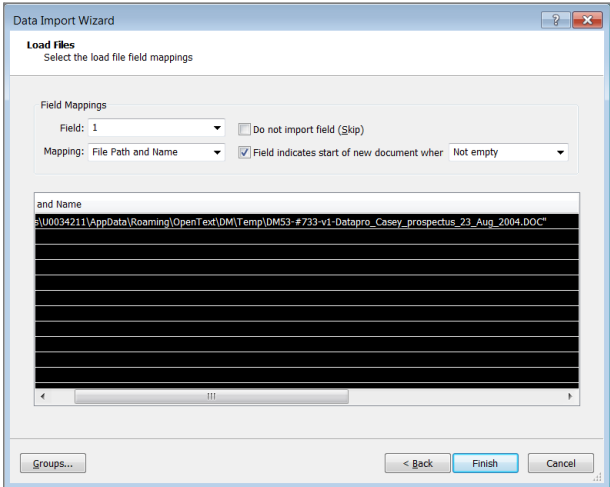


Figure 11. Data Import Wizard–Load Files dialog box

- 3. Click **Finish**. Case Notebook opens with the document, pleading, or research document listed under Documents, Pleadings, or Research in the left pane and the text of the document, pleading, or research document displayed in the right pane (Figure 12).

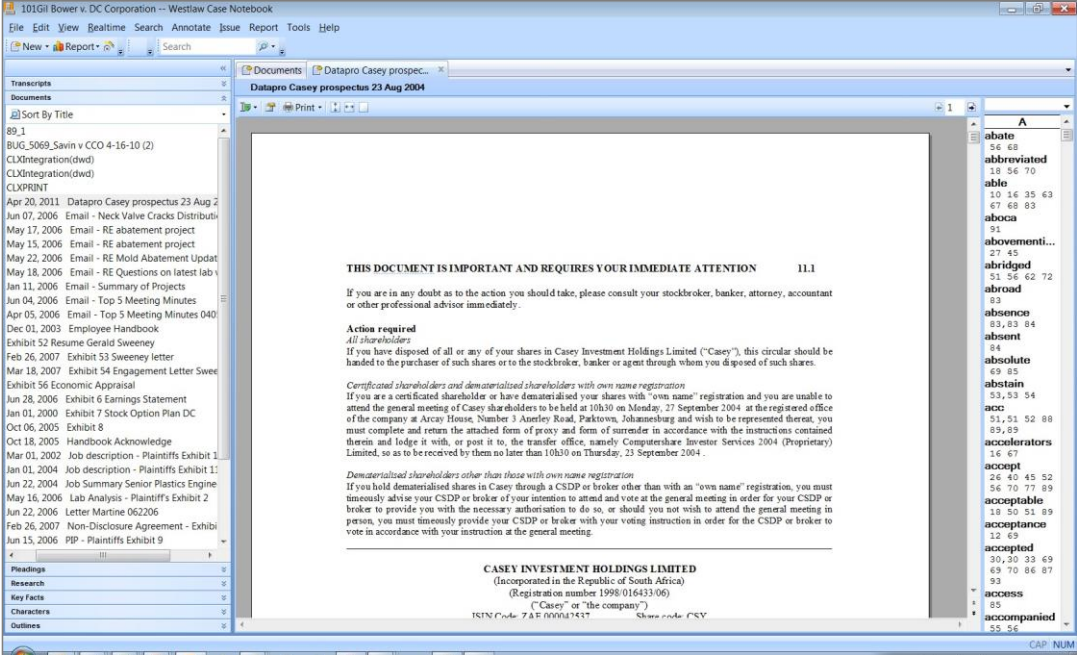


Figure 12. Document in Case Notebook

Performing a Silent Installation

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

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

For 32-bit eDOCS system:

```
MsiExec.exe /i WLCNB_eSEND_DM10_X32.msi /qn where C:\folderpath\ is the drive and folder location of the Microsoft Installer (MSI) file.
```

For 64-bit eDOCS system:

```
MsiExec.exe /i WLCNB_eSEND_DM10_X64.msi /qn where C:\folderpath\ is the drive and folder location of the Microsoft Installer (MSI) file.
```

Performing a Silent Uninstallation

To run the silent uninstallation for **Send to Westlaw Case Notebook eSEND**, type the following command at a command prompt:

For 32-bit eDOCS system:

```
MsiExec.exe /x{5C51AF92-14D1-4AF3-9F56-541DF90D5A07} /qn
```

For 64-bit eDOCS system:

```
MsiExec.exe /x{CAF0DDB3-09D8-4C36-BAB5-97F979047B36} /qn
```