



CASE NOTEBOOK

PORTAL INSTALLATION GUIDE

MAY 2018



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Contents

1 INTRODUCTION.....	1
Licensing.....	1
Preliminary Step.....	1
System Requirements.....	1
Automatic Detection and Configuration	2
2 INSTALLING IIS.....	3
Installing IIS on Windows Server 2003 Editions	3
Installing IIS on Windows Server 2008 Editions.....	5
3 INSTALLING PORTAL WEBSITE	6
Configuring Portal Website	6
Installing Portal Website	6
4 TROUBLESHOOTING	13
Configuring IIS in 32-bit Mode	13
Enabling the ASP.NET 2.0 Web Service Extension	13
Windows Server 2003 Editions	13
Windows Server 2008 Editions	14
Editing the web.config File	14
Editing web.config on Windows Server 2003 Editions	14
Editing web.config on Windows Server 2008 Editions	15
Additional Configuration on Domain Controllers.....	15
Configuration on Windows Small Business Server 2003.....	15
Configuration on Windows Small Business Server 2008 R2.....	19

1 Introduction

This guide describes installing the Westlaw Case Notebook Portal Website. Case Notebook Portal is an Application Programmer Interface (API) that enables software engineers to create a custom website. From this custom website, Case Notebook users can access identifying information (metadata) about Case Notebook transcripts, documents, pleadings, research, key facts, characters, and outlines.

Licensing

Using Portal Website requires a separate license. To purchase a license, contact your Thomson Reuters sales representative.

Preliminary Step

Before you install Portal Website, install Internet Information Services (IIS) on the server where Portal Website will be installed. For further information, see Chapter 2, Installing IIS.

Note: For Windows Server 2008 editions, Portal Website requires ASP.NET and IIS6 Management Compatibility. For further information, see "Installing IIS on Windows Server 2008 Editions".

System Requirements

The following are supported for installing the Portal Website:

Table 1-1. Portal Website Supported Operating Systems

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

1. Running in 32-bit mode

Table 1-2. Portal Website Terminal Services Supported Operating Systems

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

1. Citrix Presentation Server 4.5 with Feature Pack 1

2. CPS is now called XenApp

Table 1-3. Supported Browsers for Portal Website

Operating System	Latest Version	Windows	Linux	Unix	Mac
Internet Explorer	9	x			
Mozilla Firefox	3.5 to 9	x	x	x	x
Google Chrome	7.517 to 16	x	x	x	x
Safari	4.0 to 5.1	x			x

Automatic Detection and Configuration

Portal Website verifies and, if necessary, sets network privileges on the Portal Website installation folders to the following permissions:

- traverse folder/execute file
- list folder/read data
- read attributes
- read extended attributes
- create files/write data
- create folders/append data
- write attributes
- write extended attributes
- delete sub-folders and file
- delete
- read permissions

Note: To access case files on the repository server, you must set required permissions manually for all case folders and sub-folders. If you are installing Portal Website on Windows Small Business Server, the permissions are not configured automatically. See “Additional Configuration on Domain Controllers” .

2 Installing IIS

You can install IIS on Windows Server 2003 (including 2003 R2 and Small Business Server) and Windows Server 2008 (including 2008 R2 and Small Business Server).

Note: Ensure that your Windows Server installation media is available as it may be required to complete the installation of IIS.

Installing IIS on Windows Server 2003 Editions

Note: If you are using 64-bit Windows Server 2003 or 2003 R2 and have 64-bit web applications on the server, you must upgrade to Windows Server 2008 Standard or Windows Server 2008 R2. If you have no other web applications on the server, you can configure IIS in 32-bit mode. For more information, see “Configuring IIS in 32-bit Mode”.

To install IIS on Windows Server 2003 editions, complete these steps:

1. On the **Start** menu, click Control Panel, and then click **Add or Remove Programs**. The **Add or Remove Programs** window is displayed (Figure 2-1).



Figure 2-1. Add or Remove Programs window

2. Click **Add/Remove Windows Components** in the left pane. The **Windows Components Wizard** is displayed (Figure 2-2).

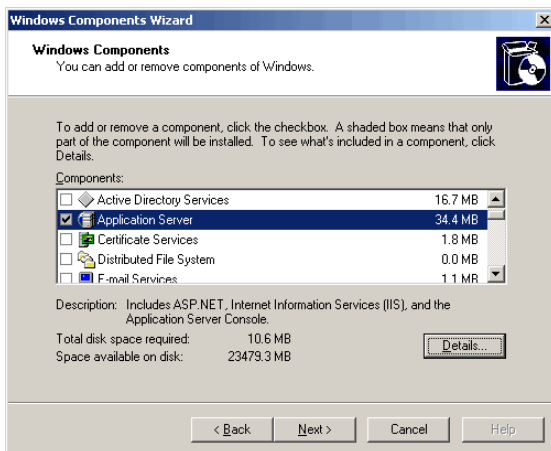


Figure 2-2. Windows Components Wizard

3. Select the **Application Server** check box, then click **Details**. The **Application Server** dialog box is displayed (Figure 2-3).

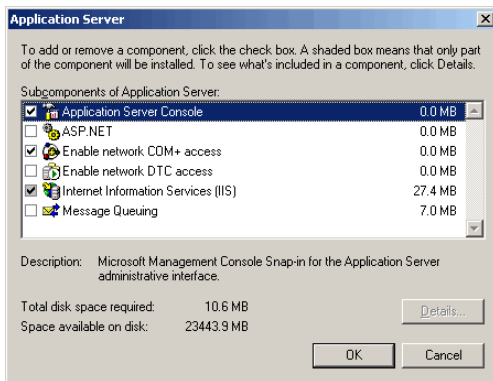


Figure 2-3. Application Server dialog box

4. Select the **Internet Information Services (IIS)** check box, then click **Details**. The **Internet Information Services (IIS)** dialog box is displayed (Figure 2-4).

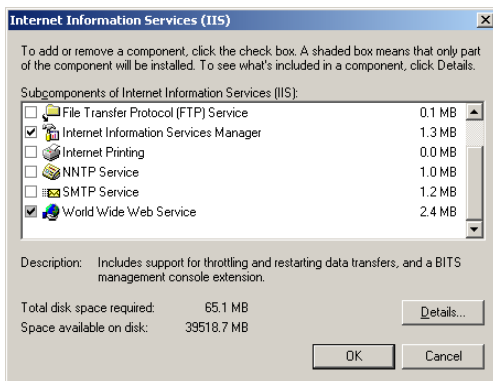


Figure 2-4. Internet Information Services (IIS) dialog box

5. Select the **Internet Information Services Manager** and **World Wide Web Service** check boxes if they are not already selected. They must be selected to run Portal Website.
6. Click **OK**, and then click **OK** again. The **Windows Components Wizard** is redisplayed.
7. Click **Next**.
8. If you are prompted for any original installation media, please provide it as directed and follow the instructions.

A message informing you that the installation is complete is displayed (Figure 2-5).



Figure 2-5. Message informing you that the installation is complete

9. Click **Finish**.

Installing IIS on Windows Server 2008 Editions

To install IIS on Windows Server 2008 editions, complete these steps:

1. On the **Start** menu, click **Administrative Tools**, and then click **Server Manager**. The **Server Manager** window is displayed (Figure 2-6).

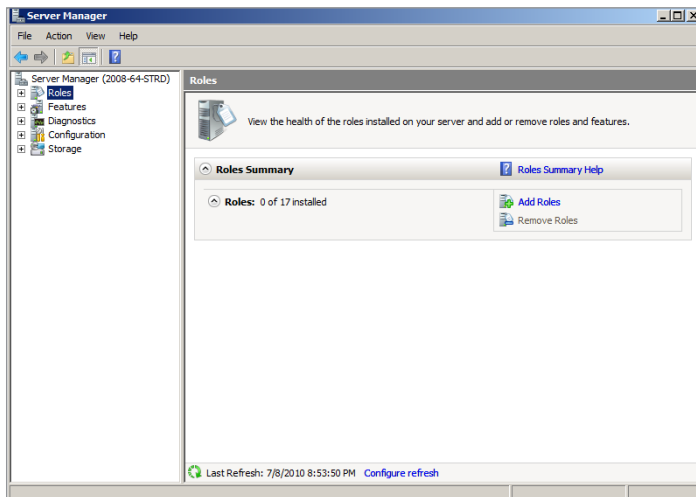


Figure 2-6. Server Manager window

2. Click **Roles** in the left pane.

- Click **Add Roles** in the right pane. If the **Before You Begin** dialog box is displayed, click **Server Roles** in the left pane. The **Select Server Roles** window is displayed (Figure 2-7).

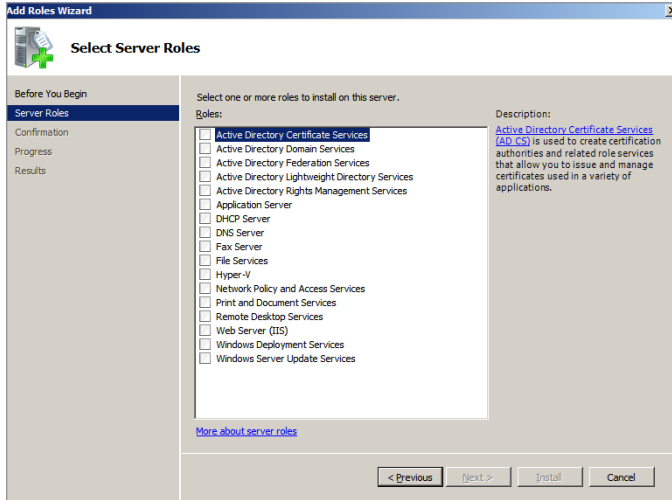


Figure 2-7. Select Server Roles window

- Select the **Web Server (IIS)** check box. If you are prompted to add other features, click **Add Required Features**.
- Click **Next**. The **Web Server (IIS)** window is displayed (Figure 2-8).

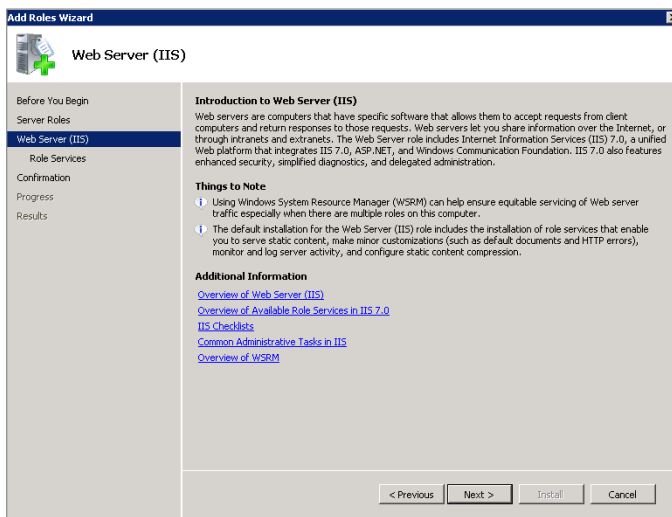


Figure 2-8. Web Server (IIS) window

- Click **Next**. The **Select Role Services** window is displayed (Figure 2-9).

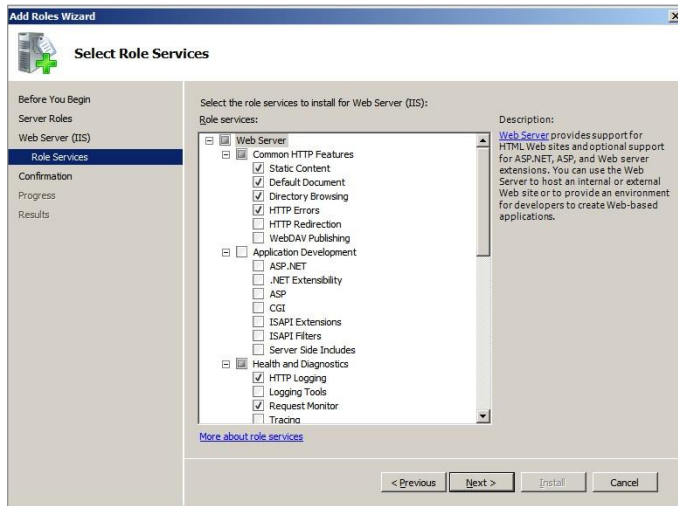


Figure 2-9. Select Role Services window

- Select the **ASP.NET** check box.
- If you are prompted to install additional role services based on the selection of ASP.NET, click **Add Required Role Services**.
- Scroll down and select the **IIS 6 Management Compatibility Services** check box.
- If you are prompted to install additional role services based on the selection of **IIS 6 Management Compatibility**, click **Add Required Role Services**.
- Click **Next**. The **Confirm Installation Selections** window is displayed (Figure 2-10).

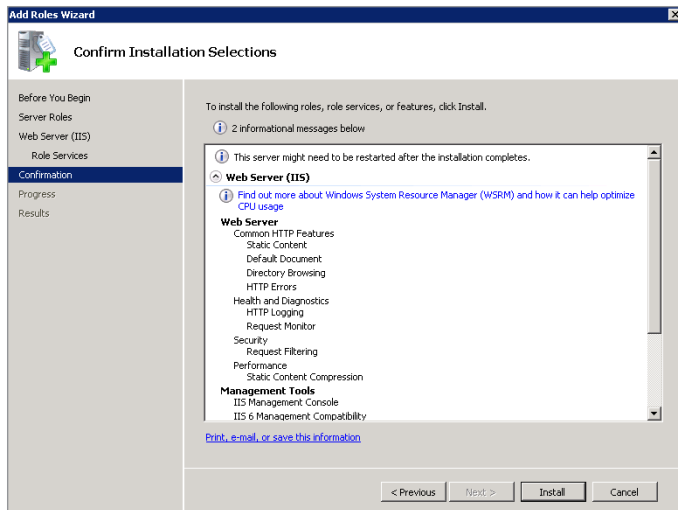


Figure 2-10. Confirm Installation Selections window

- Click **Install**.
- If you are prompted for any original installation media, please provide it as directed and follow the instructions.
- When the installation is finished, click **Close**, then close the **Server Manager** window.

3 Installing Portal Website

Portal Website connects to a repository. When you install the Portal Website, you need to provide the following:

- A license code for the Portal Website.
- A website that will host the Portal web application.
- A unique web application name (virtual directory) for each instance of Portal that is to be installed on a single server.
- The name of a server hosting an existing repository and the name of the SQL instance where the repository is installed.
- The domain user (with minimum network service privileges) under which Portal Website will run.
- Privileges for the repositories or cases.

Configuring Portal Website

It is recommended that you accept the default configuration of Portal Website during installation. If you need to configure the repository to which you want to connect, please contact Customer Technical Support at 1-800-290-9378 for further information.

Installing Portal Website

This section provides a step-by-step example of the Portal Website installation.

Note: If Windows Firewall is enabled, you must enable the World Wide Web Publishing Service (HTTP) program before installing the Portal Website.

To install Portal Website, complete these steps:

1. Click the link for Portal Website in the e-mail sent to you from Thomson Reuters. The Westlaw Case Notebook Portal Website registration page is displayed.
2. Complete the registration form and click **Proceed with Download**.
3. On the next page, click **Proceed with Download** next to the Portal Website installer. Save the installer to your computer, then move the file to the server where you want to install the Portal Website.
4. On the target server, double-click the downloaded file to launch the installer.
Note: A message indicating that you need to install Microsoft Foundation Class Library (MFC) may be displayed. MFC 10.0 SP1 is required for Portal Website.
5. If the MFC dialog box is displayed, click **Install** to proceed. When the MFC components have been installed, the **Welcome to the InstallShield Wizard** dialog box is displayed.
6. Click **Next**.

Note: If you receive an error message that the ASP.NET Web Service Extension is not installed, see "Installing IIS". If you receive an error message that the ASP.NET 2.0 Web Service Extension is prohibited, see "Enabling the ASP.NET 2.0 Web Service Extension".

The **License Agreement** dialog box is displayed (Figure 3-1).

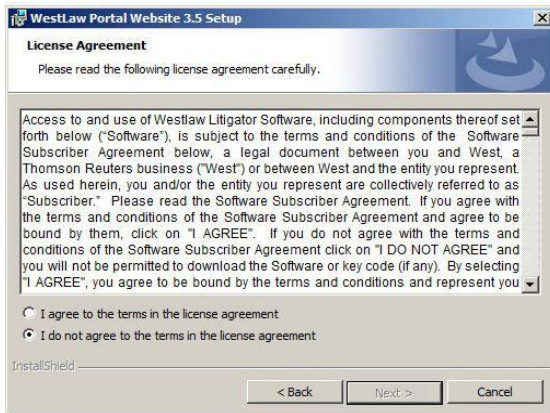


Figure 3-1. License Agreement dialog box

7. Scroll to the bottom of the license agreement as you read it, then select **I agree to the terms in the license agreement** and click **Next**. The **Readme Information** dialog box is displayed. When you are finished with the Readme information, click **Next**. The **Customer Information** dialog box is displayed (Figure 3-2).

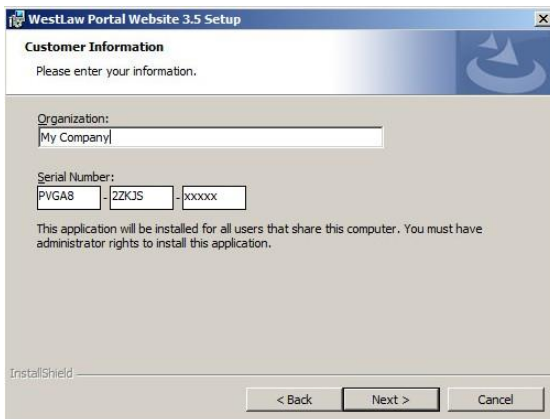


Figure 3-2. Customer Information dialog box

8. Type your organization name and serial number in the **Organization** and **Serial Number** boxes, and then click **Next**. The **Enter Portal Website Info** dialog box is displayed (Figure 3-3).

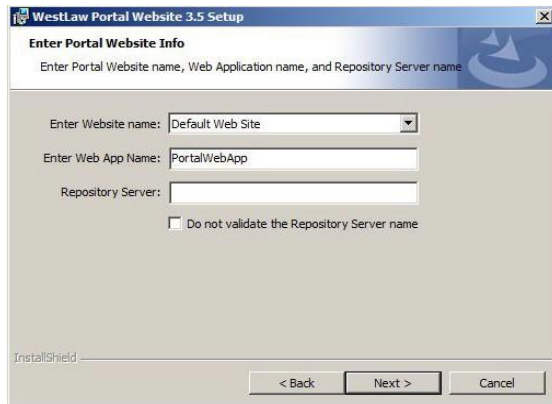


Figure 3-3. Enter Portal Website Info dialog box

9. Type the website name, web application name, and repository server name in the appropriate boxes.
- For the website, select the default site or one that you created for the Portal Website.
 - You can use the default web application name or a new web application name (without spaces).
Note: The web application name must be unique to the server. If an existing application or instance of the Portal Website is using the same name, the installer will display an error when you continue.
 - If the repository is using the SQL instance created by the Case Notebook Repository installer, you can specify only the server name. If you are using an existing SQL instance, you must specify the server name and SQL instance as follows:
<SERVER> \<INSTANCE>
Note: If you are using the default SQL instance, the server name and instance must be specified as
<SERVER> \MSSQLSERVER.
10. If you do not want the installer to verify that the specified repository exists, select the **Do not validate the Repository Server name** check box, and then click **Next**. The **Destination Folder** dialog box is displayed (Figure 3-4).

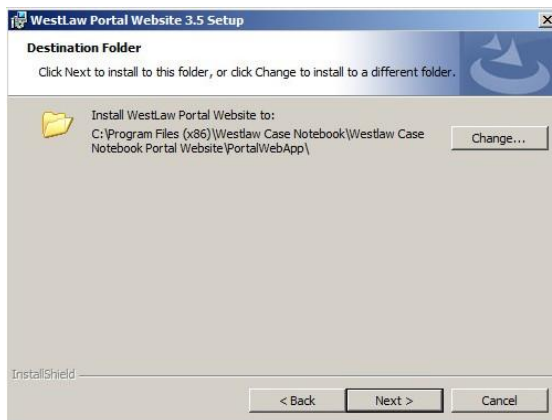


Figure 3-4. Destination Folder dialog box

11. To change the default installation folder, click **Change**. After selecting a new location and returning to the installation wizard, click **Next**. The **Logon Information** dialog box is displayed (Figure 3-5).



Figure 3-5. Logon Information dialog box

Note: If you are on a **domain** controller, you must follow additional instructions. See “Additional Configuration on Domain Controllers”.

12. Type the username and password that will be used to access Case Notebook Repository in the **User name** and **Password** boxes.
- Note:** For security purposes, do not specify a username and password that allows access to the computer where you install the Portal Website. It is recommended that you create a separate service account for the Portal Website.
13. Click **Next**. The **Ready to Install the Program** dialog box is displayed (Figure 3-6).



Figure 3-6. Ready to Install the Program dialog box

14. Click **Install** to begin the installation. When the installation is finished, the **InstallShield Wizard Completed** dialog box is displayed (Figure 3-7).

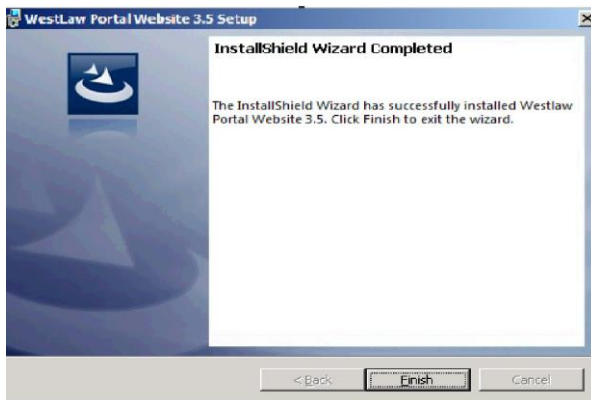


Figure 3-7. InstallShield Wizard Completed dialog box

15. Click **Finish**.

4 Troubleshooting

This chapter provides information about tasks that may be required according to your specific installation environment.

- Configuring IIS in 32-bit Mode
- Enabling the ASP.NET 2.0 Web Service Extension
- Editing the web.config File
- Additional Configuration on Domain Controllers

Configuring IIS in 32-bit Mode

Note: If you have 64-bit web applications running on 64-bit Windows Server 2003 editions, you must upgrade to Windows Server 2008 Standard or Windows Server 2008 R2. If you have no other web applications on the server, you can configure IIS in 32-bit mode.

To configure IIS in 32-bit mode, complete these steps:

1. On the **Start** menu, click **Run**. The **Run** dialog box is displayed.
2. Type `cmd` in the **Open** field, then click **OK**. A command window is displayed.
3. Navigate to the `%systemdrive%\inetpub\AdminScripts` directory.
4. Type the following command: `cscript.exe adsutil.vbs set W3SVC/AppPools/Enable32BitAppOnWin64 "true"`
5. Click the **Close** button or type `exit` to close the command window.

Enabling the ASP.NET 2.0 Web Service Extension

Portal Website requires ASP.NET and the ASP.NET Web Service Extension. Follow the steps in the appropriate section below to manually enable the extension if it has been prohibited.

WINDOWS SERVER 2003 EDITIONS

1. On the **Start** menu, click **Administrative Tools**, and then click **Internet Information Services (IIS) Manager**. The **Internet Information Services (IIS) Manager** window is displayed.
2. Click the plus symbol (+) next to the server in the left pane, and then click the **Web Service Extensions** folder to display Web Service Extensions in the right pane (Figure 4-1).

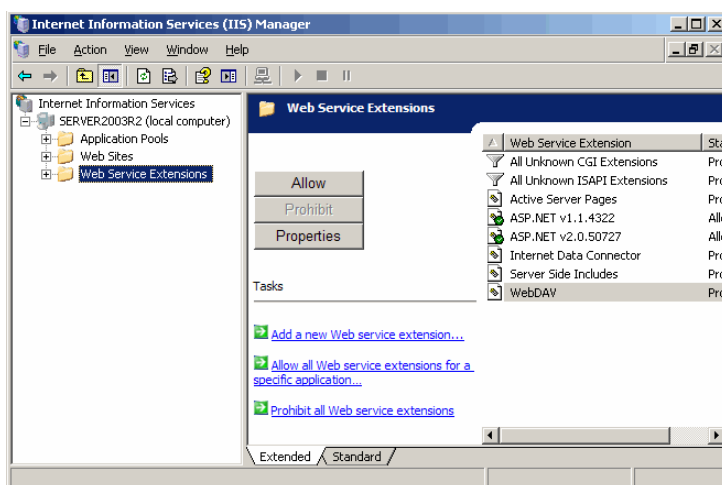


Figure 4-1. Internet Information Services (IIS) Manager window

3. Under Web Service Extensions, select **ASP.NET v2.0** and click **Allow**.

WINDOWS SERVER 2008 EDITIONS

1. On the **Start** menu, click **Administrative Tools**, and then click **Server Manager**. The **Server Manager** window is displayed.
2. Click the plus symbol (+) next to **Roles** in the left pane to display the **Web Server (IIS)** node, and then click the plus symbol (+) next to **Web Server (IIS)** to display the **Internet Information Services (IIS) Manager** node.
3. Click the **Internet Information Services (IIS) Manager** node. The **Internet Information Services (IIS) Manager** page is displayed in the right pane (Figure 4-2).

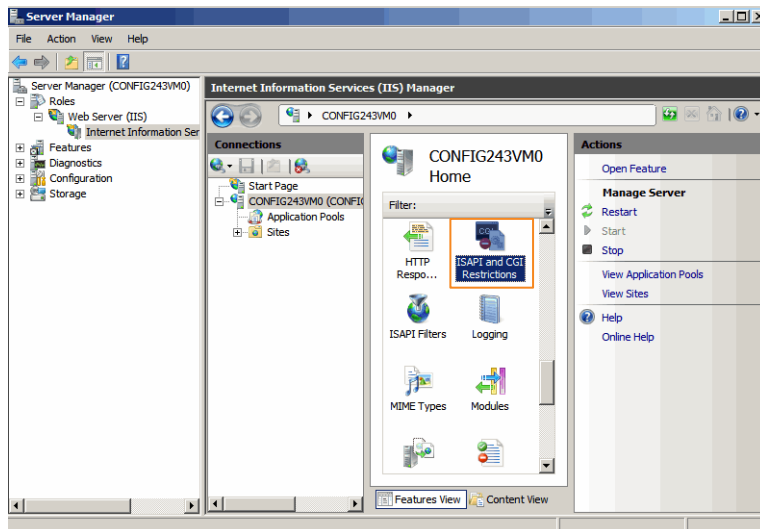


Figure 4-2. Internet Information Services (IIS) Manager page

4. Click the server name under **Connections**, then double-click the **ISAPI and CGI Restrictions** icon. The **ISAPI and CGI Restrictions** window is displayed.
5. Click the 32-bit version of the **ASP.NET Web Extension Service** and click **Allow** under the **Actions** panel to the right.

Editing the web.config File

If you entered the server name incorrectly or changed the server location, you can edit the server name in the `web.config` file. It is recommended that you make a copy of `web.config` before proceeding.

EDITING WEB.CONFIG ON WINDOWS SERVER 2003 EDITIONS

To edit `web.config` on Windows Server 2003 editions, complete these steps:

1. On the **Start** menu, click **Administrative Tools**, and then click **Internet Information Services (IIS) Manager**. The **Internet Information Services (IIS) Manager** window is displayed.
2. Click the plus symbol (+) next to the website name where Portal Website was installed.
3. Right-click the name of the Portal web application (**PortalWebApp**, by default), and then click **Properties**. The **Properties** dialog box is displayed.
4. Click the **ASP.NET** tab, and then click **Edit Configuration**. The **ASP.NET Configuration Settings** dialog box is displayed.
5. Select the **RepositoryServerNm** file and click **Edit**. The **Edit/Add Application Settings** dialog box is displayed.
6. Type the correct server name in the **Value** box.
7. Click **OK**.

EDITING WEB.CONFIG ON WINDOWS SERVER 2008 EDITIONS

To edit `web.config` on Windows Server 2008 editions, complete these steps:

1. On the Start menu, click Administrative Tools, and then click Server Manager. The Server Manager window is displayed.
2. Click the plus symbol (+) next to Roles, click the plus symbol (+) next to Web Server (IIS), and then click Internet Information Services (IIS) Manager. The Internet Information Services (IIS) Manager window is displayed in the right pane.
3. Under Connections, click the plus symbol (+) next to the server name, and then click the plus symbol (+) next to Sites.
4. Click the plus symbol (+) next to the website name where Portal was installed.
5. Click the name of the Portal web application (PortalWebApp, by default).
6. Double-click the Application Settings icon in the panel to the right. A list of Portal files is displayed.
7. Double-click the RepositoryServerNm file to display the Edit Application Setting dialog box.
8. Type the correct server name in the Value box and click OK.

Additional Configuration on Domain Controllers

If you install Portal Website on a domain controller, you must perform the following additional steps:

- Create a domain user.
- Add the domain user to the domain controller group.
- Add the domain user as a Portal Website Application Pool Identity.
- Change permissions for the Reports folder, the Temp folder, and all case folders and sub-folders.

CONFIGURATION ON WINDOWS SMALL BUSINESS SERVER 2003

Follow the additional configuration steps in this section if you installed Portal Website on Windows Small Business Server 2003 or Windows Essential Business Server 2003.

Creating a Domain User

To create a domain user, complete these steps:

1. On the **Start** menu, click **Administrative Tools**, and then click **Active Directory Users and Computers**. The **Active Directory Users and Computers** window is displayed.
2. Right-click the **Users** folder, click **New**, and then click **User**. The **New Object–User** dialog box is displayed (Figure 4-3).

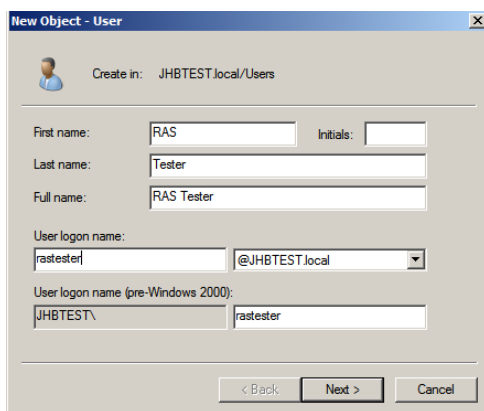


Figure 4-3. New Object–User dialog box

3. Type a first name, last name, full name, and user logon name in the appropriate boxes, and then click **Next**.
4. Type the password you use for the Case Notebook Repository to which Portal Website connects in the **Password** and **Confirm Password** boxes, and then click **Next**.

Note: The user logon name and password will be needed in later steps.

5. Clear the **Create a Microsoft Exchange Mailbox** check box, and then click **Next**.
6. Click **Finish**.

Adding the Domain User to the Domain Controller Group

To add the domain user to the domain controller group, complete these steps:

1. In the **Active Directory Users and Computers** window, click **Users** to display a list of users.
2. Right-click **IIS_WPG**, and then click **Properties** from the menu. The **IIS_WPG Properties** dialog box is displayed.
3. Click the **Members** tab (Figure 4-4).

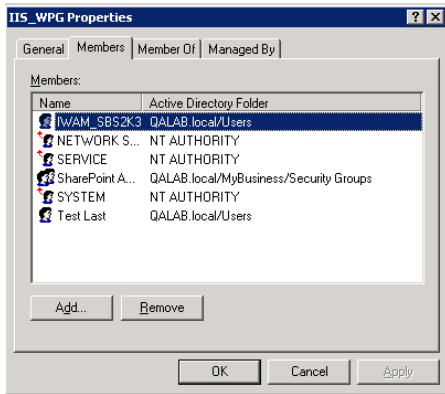


Figure 4-4. IIS_WPG Properties dialog box—Members tab

4. Click **Add**. The **Select Users, Contacts, Computers, or Groups** dialog box is displayed (Figure 4-5).

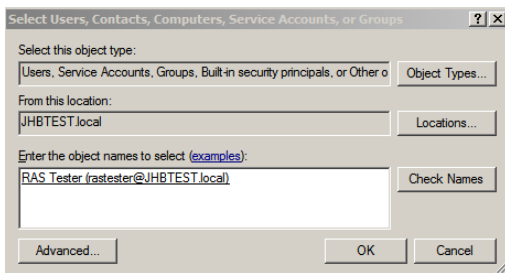


Figure 4-5. Select Users, Contacts, Computers, or Groups dialog box

5. To locate the domain user, click **Advanced**.
6. Type the user logon name you created (see step 3 in “Creating a Domain User”) in the **Name** box and click **Find Now**. The domain user is displayed at the bottom of the **Select Users, Computers, or Groups** dialog box (Figure 4-6).

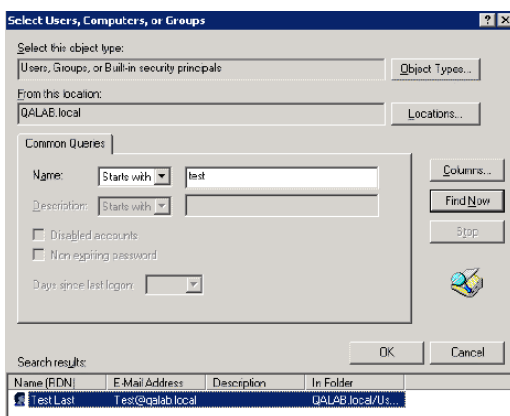


Figure 4-6. Select Users, Computers, or Groups dialog box

7. Double-click the domain user and click **OK**.
8. Click the **Close** button in all open dialog boxes.

Adding the Domain User as a Portal Website Application Pool Identity

To add the domain user as a Portal Application Pool Identity, complete these steps:

1. On the **Start** menu, click **Administrative Tools**, and then click **Internet Information Services (IIS) Manager**. The **Internet Information Services (IIS) Manager** window is displayed.
2. Click the plus symbol (+) next to the **Application Pools** folder in the left pane. A list of application pools is displayed (Figure 4-7).

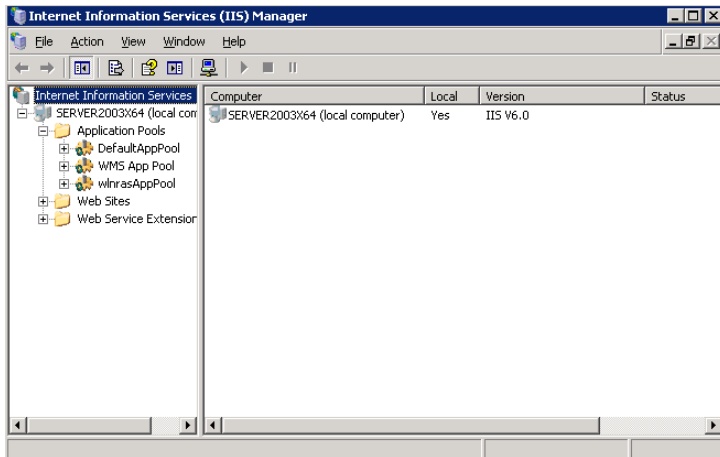


Figure 4-7. Internet Information Services (IIS) Manager window

3. Right-click the Portal Website application pool to which you want to add the domain user, and then click **Properties**. The **AppPool Properties** dialog box is displayed.
4. Click the **Identity** tab (Figure 4-8).

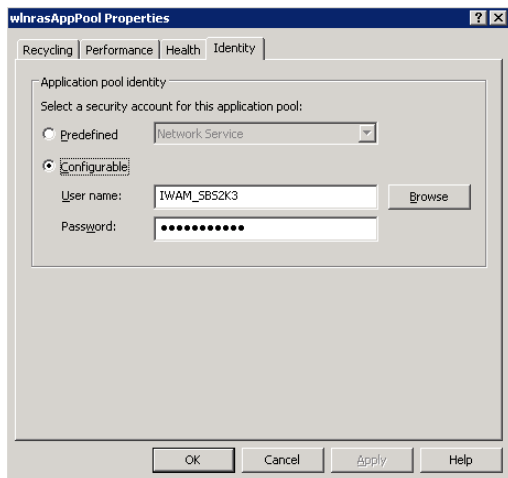


Figure 4-8. AppPool Properties dialog box—Identity tab

5. Select **Configurable**, type the user logon name and password for the domain user you created (see steps 3 and 4 in “Creating a Domain User”) in the **User name** and **Password** boxes, and then click **OK**.
6. Click the **Close** button in the **Internet Information Services (IIS) Manager** window.

Setting Permissions for the Reports and Temp Folders

You can use the same steps below to set the permissions for both the Reports and Temp folders:

1. Locate the folder in the Portal installation directory using Windows Explorer. By default, the folder is located in C:\Program Files (x86)\Westlaw Case Notebook\Westlaw Case Notebook Portal\PortalWebApp.
2. Select the folder, right-click the folder, and then click **Properties**. The **Properties** dialog box for the selected folder is displayed.
3. Click the **Security** tab (Figure 4-9).

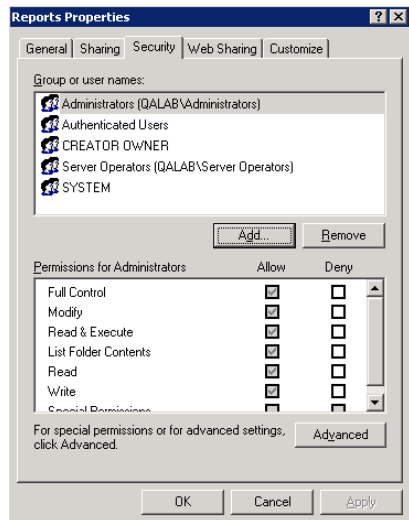


Figure 4-9. Reports Properties dialog box–Security tab

4. Click **Add**. The **Select Users, Computers, or Groups** dialog box is displayed.
5. To locate the domain user, click **Advanced**.
6. Type the user logon name you created (see step 3 in “Creating a Domain User”) in the **Name** box and click **Find Now**. The domain user is displayed at the bottom of the **Select Users, Computers, or Groups** dialog box.
7. Double-click the domain user and click **OK**.
8. Click the **Close** button in the **Select Users, Computers, or Groups** dialog box.
9. In the **Properties** dialog box, select all permissions check boxes under **Allow** except the **Full Control** check box, and then click **OK**.
10. Click **OK**.

Setting Permissions on Case Folders and Sub-Folders

To set permissions for your case folders and sub-folders, locate the folders on the Case Notebook Repository server using Windows Explorer and follow steps 2–10 above.

CONFIGURATION ON WINDOWS SMALL BUSINESS SERVER 2008 R2

Follow the additional configuration steps in this section if you installed Portal Website on Windows Small Business Server 2008 R2 or Windows Essential Business Server 2008 R2.

Creating a Domain User

To create a domain user, complete these steps:

1. On the **Start** menu, click **Administrative Tools**, and then click **Active Directory Users and Computers**. The **Active Directory Users and Computers** window is displayed.
2. Right-click the **Users** folder, click **New**, and then click **User**. The **New Object–User** dialog box is displayed (Figure 4-10).

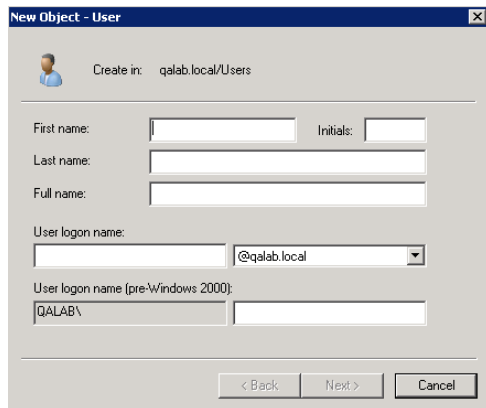


Figure 4-10. New Object–User dialog box

3. Type a first name, last name, full name, and user logon name in the appropriate boxes, and then click **Next**.
4. Type the password you use for the Case Notebook Repository to which Portal Website connects in the **Password** and **Confirm Password** boxes, and then click **Next**.
Note: The user logon name and password will be needed in later steps.
5. Click **Finish**.

Adding the Domain User to the Domain Controller Group

To add the domain user to the domain controller group, complete these steps:

1. In the **Active Directory Users and Computers** window, click the **Built-in** folder.
2. Right-click **IIS_IUSRS**, and then click **Properties**. The **IIS_IUSRS Properties** dialog box is displayed.
3. Click the **Members** tab (Figure 4-11).

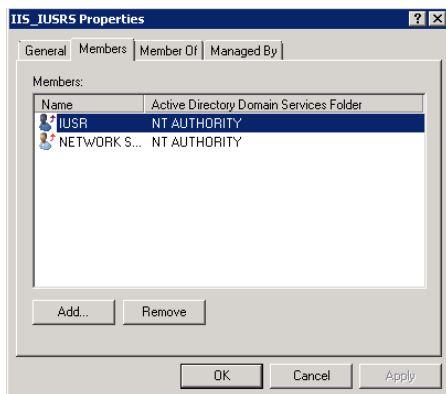


Figure 4-11. IIS_IUSRS Properties dialog box–Members tab

4. Click **Add**. The **Select Users, Contacts, Computers, or Groups** dialog box is displayed (Figure 4-12).

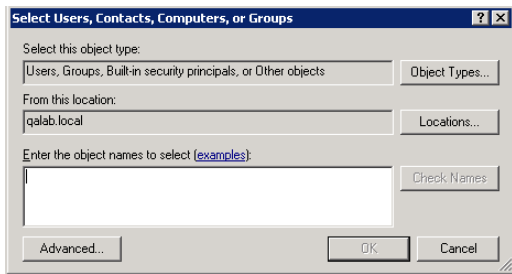


Figure 4-12. Select Users, Contacts, Computers, or Groups dialog box

5. To locate the domain user, click **Advanced**.
6. Type the user logon name created in step 3 of "Creating a Domain User" in the **Name** box and click **Find Now**. The domain user is displayed at the bottom of the **Select Users, Contacts, Computers, or Groups** dialog box (Figure 4-13).

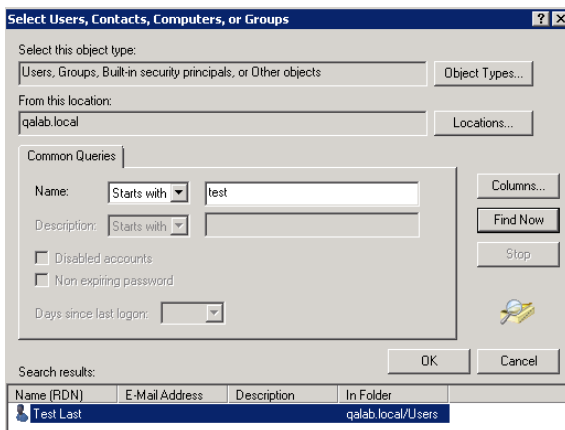


Figure 4-13. Select Users, Contacts, Computers, or Groups dialog box

7. Double-click the domain user and click **OK**.
8. Click the **Close** button in all open dialog boxes.

Adding the Domain user as a Portal Website Application Pool Identity

To add the domain user as a Portal Website Application Pool Identity, complete these steps:

1. On the **Start** menu, click **Administrative Tools**, and then click **Internet Information Services (IIS) Manager**. The **Internet Information Services (IIS) Manager** window is displayed.
2. Click the first plus symbol (+), then click the **Application Pools** folder. A list of application pools is displayed in the center pane.

3. Select the Portal Website application pool to which you want to add the user, and then click **Advanced Settings** under **Actions** (right pane) to display the **Advanced Settings** dialog box (Figure 4-14).

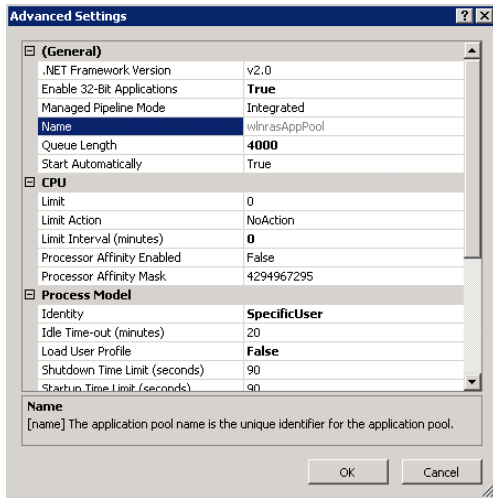


Figure 4-14. Advanced Settings dialog box

4. Select **Identity**, and then click the ellipsis button (...). The **Application Pool Identity** dialog box is displayed (Figure 4-15).

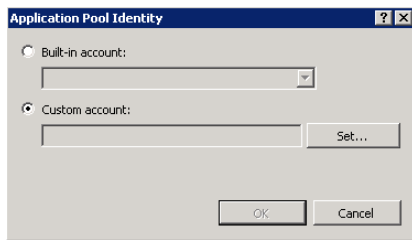


Figure 4-15. Application Pool Identity dialog box

5. Select **Custom account**, and then click **Set** to display the **Set Credentials** dialog box (Figure 4-16).

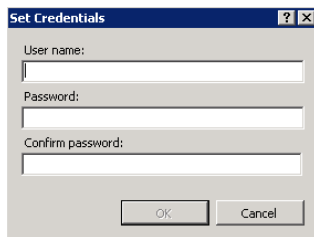


Figure 4-16. Set Credentials dialog box

6. Type the user logon name and password for the domain user you created (see steps 3 and 4 of “Creating a Domain User”) in the appropriate boxes, and then click **OK**.

Setting Permissions for the Reports and Temp Folders

You can use the same steps below to set the permissions for both the Reports and Temp folders:

1. Locate the folder in the Portal Website installation directory using Windows Explorer. By default, the folder is located in C:\Program Files (x86)\Westlaw Case Notebook\Westlaw Case Notebook Portal Website 3.5\PortalWebApp.
2. Select the folder, right-click the folder, and then click **Properties**. The **Properties** dialog box for the selected folder is displayed.
3. Click the **Security** tab (Figure 4-17).

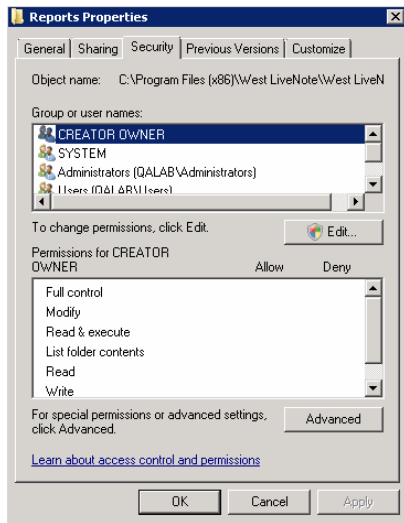


Figure 4-17. Reports Properties dialog box—Security tab

4. Click **Edit**. The **Permissions** dialog box for the selected folder is displayed.
5. Click **Add**. The **Select Users, Computers, or Groups** dialog box is displayed.
6. To locate the domain user, click **Advanced**.
7. Type the user logon name you created (see step 3 of “Creating a Domain User”) in the **Name** box and click **Find Now**. The domain user is displayed at the bottom of the **Select Users, Computers, or Groups** dialog box.
8. Double-click the domain user and click **OK**.
9. Click the **Close** button in the **Select Users, Computers, or Groups** dialog box.
10. In the **Permissions** dialog box, select all permissions check boxes under **Allow** except the **Full Control** check box, and then click **OK**.
11. Click **OK** in the **Properties** dialog box.

Setting Permissions for Case Folders and Sub-folders

To set permissions for your case folders and sub-folders, locate the folders on the Case Notebook Repository server using Windows Explorer and follow steps 2–11 above.

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