

CASE NOTEBOOK APPLICATION SUITE

INSTALLATION GUIDE

Version 5.7
January 2023



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1 Introduction

This guide provides information about installing products belonging to the Case Notebook application suite.

The Case Notebook Application Suite

There are four main components of the Case Notebook application suite. To view a diagram of the Case Notebook application suite, see “Appendix A: Components of the Case Notebook Application Suite” on page 15. The four main components of the comprising the suite are:

- **Case Notebook:** An application that serves as an electronic organizer and deposition tool for saving and working with important documents, research, and transcripts in a case.
- **Case Notebook Repository:** A database for Case Notebook shared cases that allows administrators to assign access rights to cases to multiple users.
- **Case Notebook Administration:** An application used by Case Notebook administrators to create and manage shared cases in a repository.
- **Case Notebook Remote Access Server (RAS):** An application that provides remote access to Case Notebook cases via the Internet. To view the component diagram, see “Appendix B: Components of the Case Notebook Remote Access Service (RAS)” on page 16.

CASE NOTEBOOK

Case Notebook is an electronic organizer and deposition tool for saving and working with important documents, research, and transcripts. Case Notebook is installed on each user’s computer. There are three license types for Case Notebook: Case Notebook, Case Notebook (Research), and Case Notebook (Transcripts). Your license type does not affect the installation of the products or their use with other applications in the suite. This document refers to all these license types as Case Notebook

CASE NOTEBOOK REPOSITORY

For Case Notebook or Case Notebook administrators. Case Notebook Repository allows multiple users to have access to Case Notebook cases and is managed by Case Notebook Administration. Case Notebook Repository is installed on a server that is accessible to all Case Notebook users and administrators. You must use Case Notebook Repository if you want multiple users to have access to Case Notebook cases.

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. Case files are not backed up as part of the repository backup. Case Notebook Repository includes the following:

- **Case Notebook Repository Service** - Runs a SQL service used to authenticate users and direct them to shared cases.
- **Case Notebook Data Repository** – A proprietary database file that allows Case Notebook administrators to store and manage secure case files.
- **Shared Case Files** – Files stored on a local area network (LAN) and accessible to multiple users.

Case Notebook Administration is used in conjunction with Case Notebook Repository to manage access to Case Notebook cases that are shared across a network. Case Notebook Administration is installed on each administrator's computer and connects to SQL server. 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.

CASE NOTEBOOK TERMINAL SERVICE (OPTIONAL)

Case Notebook Terminal Service provides remote access to Case Notebook through Microsoft Terminal Services, Microsoft Remote Desktop Services, or Citrix Virtual Apps and Desktops. To view a diagram of the Case Notebook Terminal Service, see “Appendix C: Components of Case Notebook Terminal Service” on page 17.

Important: When an older version of Case Notebook that was published for Citrix is upgraded to a newer version, 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 offline. Additionally, the quality of streaming video for historical transcripts may vary substantially depending on your hardware and network capacity. For more information on LiveNote Stream, download the **Case Notebook User Guide** at <https://store.legal.thomsonreuters.com/law-products/c/Case-Notebook-User-Guide/p/990001143>.

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. Note that Case Notebook 5.7 does NOT support Windows RT.

Case Notebook and Case Notebook Administration Supported Operating Systems

Operating System	32-bit	64-bit
Windows 10 Home and Pro	x	x
Windows 11 Home and Pro		x
Windows Server 2012 and 2012 R2	x	x
Windows Server 2016	x	x
Windows Server 2019		x
Windows Server 2022		x

Case Notebook Terminal Services Supported Operating Systems

You must install the current version of Citrix Virtual Apps and Desktops which is supported by Citrix. Refer to the Long-Term Service Release (LTSR) program for Citrix Virtual Apps and Desktops on the Citrix website for recent updates. Additionally, the version of Citrix you are using must be compatible with the supported operating system that is installed on your machine.

Note: Citrix Virtual Apps and Desktops is a virtualization solution that gives IT control of virtual machines, applications, licensing, and security, while providing access anywhere for any device. The Long-Term Service Release (LTSR) program for Citrix Virtual Apps and Desktops provides stability and long-term support for Citrix Virtual Apps and Desktops releases.

Case Notebook Repository and RAS Supported Operating Systems

Operating System	32-bit	64-bit
Windows Server 2012 and 2012 R2	x	x
Windows Server 2016	x	x
Windows Server 2019		x
Windows Server 2022		x

MINIMUM HARDWARE REQUIREMENTS FOR CASE NOTEBOOK

- Personal computer with 1GHz dual-core processor (3 GHz i3 or equivalent recommended)
- 4 GB of RAM
- 20 GB of available hard disk space (40 GB recommended)
- Screen resolution minimum of Super VGA 800 x 600 (XGA 1024 X 768 recommended)

MINIMUM HARDWARE FOR CASE NOTEBOOK REPOSITORY

- Personal computer with 1GHz dual-core processor (3 GHz i3 or equivalent recommended)
- 4 GB of RAM
- 50 GB of available hard disk space (100 GB recommended)
- Screen resolution minimum of Super VGA 800 x 600 (XGA 1024 X 768 recommended)

OTHER REQUIREMENTS FOR CASE NOTEBOOK

- Microsoft Edge, Google Chrome
- Windows Media Player 12 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.

2 Installing the Case Notebook Application Suite

To install Case Notebook, you must have an appropriate license code. Upon purchase, Thomson Reuters sends you an email verifying purchase of the Case Notebook application suite components. This email includes:

- A link to the download site for each suite component you purchased.
- License codes for each suite component you purchased.

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

When installing multiple suite components, it is suggested that you install the components in the following order:

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

To support TLS 1.2 protocols for the Repository connection, Microsoft OLE DB Driver for SQL Server 18.2.2.0 is included for client and server machines when installing the applications. Each machine must have the same TLS protocols set.

Installing Case Notebook Repository

The following conditions apply when installing Case Notebook Repository:

- You must install Case Notebook Administration on a local drive, not a shared network.
- If you have a supported version of Microsoft SQL Server already installed on your computer, you can use Case Notebook Administration to install Case Notebook Repository.
- You must install Case Notebook Repository on a supported server that is accessible to all Case Notebook users and administrators. Each user's computer must have a TCP connection to Case Notebook Repository. For a list of supported servers, see "Supported Operating Systems" on page 4.

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. Case Notebook Repository can utilize an existing installation of SQL Server 2012, SQL Server 2014 Express, SQL Server 2014, SQL Server 2016, SQL Server 2017, or SQL Server 2019. If an existing installation of SQL Server is not present or is a version earlier than 2014, you should select to install Case Notebook Repository with the Microsoft SQL Server 2014 Express database (see options below). If you have your own instance of SQL server, see "Installing Case Notebook Repository on an Existing SQL Server" on page 6.

- WestlawCNBAdmin-5.7.exe installs Case Notebook Administration without SQL Server on 32- or 64-bit operating systems.
- WestlawCNBRepositorysql32-5.7.exe installs Case Notebook Administration and Case Notebook Repository with 32-bit Microsoft SQL Server 2014 Express on 32-bit servers.
- WestlawCNBRepositorysql64-5.7.exe installs Case Notebook Administration and Case Notebook Repository with 64-bit Microsoft SQL Server 2014 Express on 64-bit servers.

To install Case Notebook repository:

1. Click the link for Case Notebook Repository in the e-mail sent to you from Thomson Reuters.
2. Complete the registration form and click **Proceed to Download** at the bottom of the page.
3. Select to download and install the 32- or 64-bit option appropriate for your computer or server.
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 2014 Express, or both, will be installed.

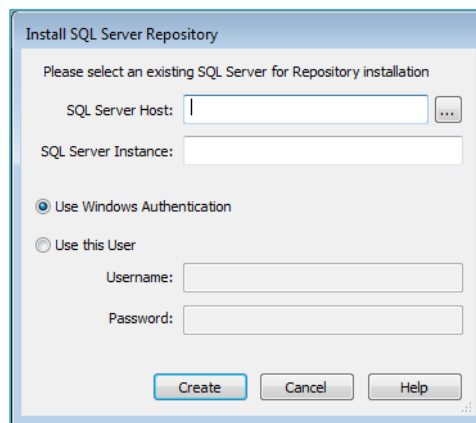
Note: If you want to use an existing SQL Server, you only need to install Case Notebook Administration. For more information, see "Installing Case Notebook Repository on an Existing SQL Server" on page 6.

5. Click **Install**.
6. Click **Next**. The License Agreement is displayed. You must scroll to the bottom of the license agreement as you read it, click **I agree to the terms in the license agreement**, then click **Next**.
7. Type your information and license code in the boxes provided, then click **Next**.
8. It is recommended that you accept the default installation destination. The 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). Click **Next**.
9. Click **Install** to begin the installation.
10. Click **Finish**.

INSTALLING CASE NOTEBOOK REPOSITORY ON AN EXISTING SQL SERVER

Case Notebook Repository uses SQL Server for data storage and retrieval. 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 2014 Express is installed.

1. Install Case Notebook Administration on the server where SQL is installed.
2. Click the **Repository** menu and select **Close** to close any open repositories.
3. Click the **Repository** menu and select **Install SQL Server Repository**.
4. Browse for or enter the SQL Server information in the boxes provided. The SQL Server Instance box indicates the location to install the repository. This name must match the name selected during installation.



5. 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.
6. 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 the clients 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: SQLServer2014MSSQLUser\$MyServer\$MyInstance.
Note: You may be able see the entire name of the group more clearly under Groups on the Users and Groups lists.
4. Open SQL Server Configuration Manager.
5. In the left pane, double-click **SQL Server 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.
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 Case Notebook Administration

If you are installing the Case Notebook suite, you must first install Case Notebook Repository (or already have Microsoft SQL Server 2014 installed on your computer), then install Case Notebook Administration on each Case Notebook administrator's computer using the instruction below:

1. Click the link for Case Notebook Administration in the e-mail sent to you from Thomson Reuters.
2. Complete the registration form and click **Proceed to Download** at the bottom of the page.
3. Select to download and install the 32- or 64-bit option appropriate for your computer or server.
4. Click **Next**. The License Agreement is displayed. You must scroll to the bottom of the license agreement as you read it, click **I agree to the terms in the license agreement**, then click **Next**.
5. After reading the Read Me information, click **Next**.
6. Type your information and license code in the boxes provided, then click **Next**.
7. It is recommended that you accept the default installation destination. Click **Next**.
8. Click **Install**.
9. Click **Finish**.
10. Repeat steps 1 through 11 for all Case Notebook administrator's systems.

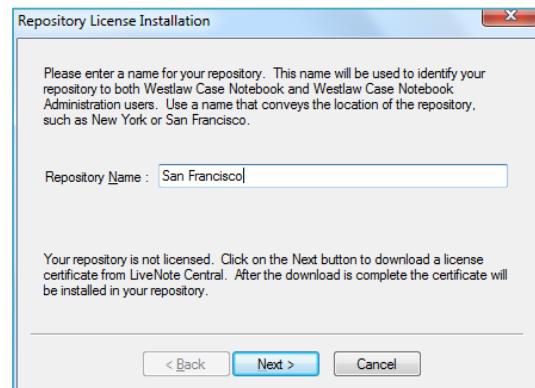
Note: When you install Case Notebook Administration, earlier versions are automatically uninstalled. To completely uninstall Case Notebook Administration, you must also uninstall Microsoft SQL Server Express if it was installed with Case Notebook Administration.

Licensing the 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. The first time you launch Case Notebook Administration, you will be prompted to enter a Repository Name. Type a name for the repository (for example, San Francisco) in the box provided and click **Next**.
2. Type the user information in the boxes provided and click **Next**. Make sure you keep track of the username and password for later use.
3. Click **Finish**. The Case Notebook Administration window is displayed.

Note: You can add additional administrators via Case Notebook Administration. For more information, access the Case Notebook Administration help via the **Help** menu in the application or consult the **Case Notebook Administration User Guide** at <https://store.legal.thomsonreuters.com/law-products/c/Case-Notebook-Administration-User-Guide/p/990001144>.



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 more information, access the Case Notebook Administration help via the **Help** menu or consult the **Case Notebook Administration User Guide** at <https://store.legal.thomsonreuters.com/law-products/c/Case-Notebook-Administration-User-Guide/p/990001144>.

ADDING A 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, and you must add the repository manually. Otherwise, you can add repository servers manually by clicking the **Repository** menu, selecting **Manage**, and clicking **Add**.

1. Type a server name or IP address into the box provided.
or
Click the **Browse** button to go to and select a repository server.
or
Click **Locate** to initiate an automated search of your network and automatically populate the list with all available repositories.
2. To set the default repository, select the repository and select **Set As Default**.
3. Click **Close**.

Installing Case Notebook

There are three license types for Case Notebook: Case Notebook, Case Notebook (Research), and Case Notebook (Transcripts). Your license type does not affect the installation of the products or their use with other applications in the suite. This document refers to all these license types as Case Notebook. The names of the Case Notebook installers indicate the product to be installed and whether SQL server is installed. Your license type 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.

- WLCNBNSQL-5.7.exe - Installs Case Notebook without SQL server on 32- or 64-bit operating systems.
- WLCNBSQL32-5.7.exe - Installs Case Notebook with Microsoft SQL Server 2014 Express on 32- bit operating systems.
- WLCNBSQL64-5.7.exe - Installs Case Notebook with Microsoft SQL Server 2014 Express on 64- bit operating systems.

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 e-mail sent to you from Thomson Reuters.
2. Complete the registration form and click **Proceed to Download** at the bottom of the page.
3. Select to download and install the 32- or 64-bit option appropriate for your computer or server.

4. If a supported instance of Microsoft SQL Server is not already installed on your computer, the installer displays a dialog box indicating that Microsoft SQL Server 2014 Express will be installed.
5. Click **Install**
6. Click **Next**. The License Agreement is displayed. You must scroll to the bottom of the license agreement as you read it, click **I agree to the terms in the license agreement**, then click **Next**.
7. After reading the Read Me information, click **Next**.
8. Type your information and license code in the boxes provided, then click **Next**.
9. It is recommended that you accept the default installation destination. Click **Next**.
10. Click **Install** to begin the installation.
11. 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 2014 Express if it was installed with Case Notebook.

For optimum application display on machines set to use 1920 x 1080 resolution, navigate to Display settings, click **Advanced scaling settings** and change Custom scaling to 100. Click **Apply** and then click the **Sign off now** link to sign out and set the Custom scaling.

3 Upgrading and Importing Repositories

Upgrading Repository Version 3.x or 4.x to Case Notebook Repository 5.7

Before opening a version 3.x or 4.x repository in Case Notebook Administration 5.7, it is strongly recommended that you back up your current repository database. Once you open the version 3.x or 4.x repository, the repository is upgraded to version 5.7.

When you upgrade a repository, the information in your cases does not change and you can still access cases using the matching version of the software.

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 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.

Upgrading from Version 3.x or 4.x to Case Notebook 5.7

The below chart lists the SQL Server version included with the installer from version 3.x to 5.7.

Case Notebook Version	3.0 to 3.0.1	3.5 to 3.6.1	4.0 to 4.7	5.0	5.1 to 5.7
SQL Server version included with installers	SQL Server 2005 Express SP3/SP4	SQL Server 2008 Express SP3	SQL Server 2014 Express SP1	SQL Server 2014 Express SP1	SQL Server 2014 Express SP3

Case Notebook is designed so that SQL Server will upgrade sequentially by one version only.

If you have Case Notebook version 3.0 to 3.0.1, which comes with SQL Server 2005, and want to upgrade to Case Notebook version 5.7, which comes with SQL Server 2014, then first install an intermediate version from 3.5 to 3.6.1, which comes with SQL Server 2008, and then install version 5.7 i.e., you will need to upgrade twice.

If you have Case Notebook version 4.x, which comes with SQL Server 2014, and want to upgrade to Case Notebook version 5.7, which also comes with SQL Server 2014 (Express SP3), then you can install version 5.7 directly i.e., only one upgrade will be required.

Opening Version 3.x or 4.x Cases in Case Notebook 5.7

When you open a case created in version 3.x or 4.x using Case Notebook 5.7, Case Notebook automatically backs up your case information and upgrades the case to version 5.7. Additionally, when you replicate a case to the network you are prompted to upgrade the case to version 5.7.

Local case information for version 5.7 is stored in the following location:

- Windows 10: %PUBLIC%\Documents\Westlaw Case Notebook\Cases\Upgrade Backup

Secure case information for version 5.7 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

Import repositories created in previous versions of LiveNote Repository. Importing these repositories adds the repository to the new repository. It does not replace the new repository. There is no need to restart the server after updating a repository even if the

repository exists on a WAN. Importing repositories that contain hundreds or more exhibits, hundreds of case updates, or via a slow connection can create slow import times.

IMPORTING LIVENOTE REPOSITORY VERSION 9 OR 10 REPOSITORIES

1. Click the **Repository** menu and select **Import Repository (version 9 or 10)**.
2. Click **Add** and use one of the following options:
 - Type a server name or IP address into the box provided.
 - Click the **Browse** button to go to and select a repository server.
 - Click **Locate** to initiate an automated search of your network and automatically populate the list with all available repositories.
3. Select the repository to import and click **Next**.
4. Login with the administrator username and password.
5. Select options from the bottom of the dialog to list the cases, select the cases to include in the import, then click **Next** to import those cases.
 - If you import a case, delete that case, then import that same case using the **Previously imported and then deleted from Case Notebook administration** list option, the case is imported as a new case.
 - If you import a case that exists in Case Notebook, the most recent imported case is appended with a ~1 to indicate one is a copy. You can delete the older imported case without affecting the newly imported case.
6. Select the cases for which you want to build search indexes and click **Next**.
7. Browse for a **Destination Case Directory** and select an option for **Open and Offline Cases**:
 - **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.
8. Click **Finish**.
 - When a transcript cannot be located, a message is displayed, and a blank transcript is created in its place to indicate the transcript was not imported.
 - When a transcript contains an invalid date, a message is displayed and the import attempts to correct the date.
 - When a lined exhibit cannot be located, a message is displayed, and an RTF file is created that includes the text "This file was not found when upgrading from an earlier version of the software."
 - Synchronized video information is imported but the import does not validate the existence of the video.

IMPORTING LIVENOTE REPOSITORY VERSION 8 REPOSITORIES

1. Click the **Repository** menu and select **Import Repository (version 8)**.
2. Browse to and select the `sc.nlr` file and click **Open**.
3. Users and groups that do not exist in the new repository are imported. If case information is included, you are prompted to select the cases to import.
4. Select an owner for the annotations and click **OK**.
5. Browse for a **Destination Case Directory** and click **OK**.
 - 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. Before you use this utility, it is recommended that you upgrade your LiveNote version 8.3 or later cases to the current Case Notebook version.
 - To download the utility, go to <https://legal.thomsonreuters.com/en/support/software-downloads/case-notebook> and click **Proceed with Download**. For information on using the utility, download the **Send to CaseMap from LiveNote: Link Conversion Utility** quick reference guide at <https://store.legal.thomsonreuters.com/law-products/c/Send-to-CaseMap-from-LiveNote-Link-Conversion-Utility/p/990001259>.

4 Upgrading License Codes

Upgrading a License Code

If you need to replace an expired license code of the same software version, upgrade a demo license to a working license of the same version, or upgrade to Case Notebook from Case Notebook (Transcripts) or Case Notebook (Research), complete these steps:

1. From Case Notebook, click the **Help** menu and select **License**.
2. Type or paste your new license code in the **New License Code** box and click **Verify**.
3. A message indicates if 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.

5 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, username, 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.

Note: You may need to reboot your computer during the installation.

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 the installation parameters must be passed within the "/qn ... " switch. In the example below, the installation parameters are shown in blue:

```
WLCNBSQL32-5.7.exe /S /V"/qn LICENSE_CODE=CZZQ3-3JFHG-XXXXX INSTALLDIR=C:\TEST USERNAME=QA-TEST  
COMPANYNAME=\"THOMSON REUTERS\""
```

Where WLCNBSQL32-5.7.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 an elevated/administrator 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, 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 at a command prompt:

CASE NOTEBOOK

```
Msiexec.exe /x{7D72543B-9ACE-46AC-89EB-41A053E053C4} /qb
```

CASE NOTEBOOK WITHOUT SQL

```
Msiexec.exe /x{9FF74F9B-E9A7-4495-B938-7A945099AE32} /qb
```

CASE NOTEBOOK ADMINISTRATION

```
Msiexec.exe /x{F9FBE3ED-4D18-4A0C-9E7D-3F46B0129FB3} /qb
```

CASE NOTEBOOK ADMINISTRATION AND CASE NOTEBOOK REPOSITORY

```
Msiexec.exe /x{EE3ADDFD-7D02-4C49-99EC-451CA5380520} /qb
```

RAS

Instance 0: Msiexec.exe /x{BD389E8C-6B0D-414F-A915-232C8F6C9591} /qb

Instance 1: Msiexec.exe /x{2798F4EF-82FD-443B-8475-A4F55A206256} /qb

Instance 2: Msiexec.exe /x{45848F8D-F80D-49AB-AB7A-29C0E3D6273B} /qb

Instance 3: Msiexec.exe /x{CB61CB31-4D41-40F1-97CA-05B4DA86BD72} /qb

Instance 4: Msiexec.exe /x{AF5E0964-2B89-443C-8157-82BBB6D9E8ED} /qb

Instance 5: Msiexec.exe /x{C2CB6C1B-CC36-4EE3-93B6-D660EA2B79CA} /qb

Instance 6: Msiexec.exe /x{8D1CC51E-6F1B-4246-B936-FC52DD319D0A} /qb

Instance 7: Msiexec.exe /x{6ABC5A97-2002-4DD7-85BB-B663D9142337} /qb

Instance 8: Msiexec.exe /x{B9F1CA56-349C-4BE0-AE94-2335ECCAE0BC} /qb

Instance 9: Msiexec.exe /x{2BAD390B-4180-4771-8F57-596273E60D5B} /qb

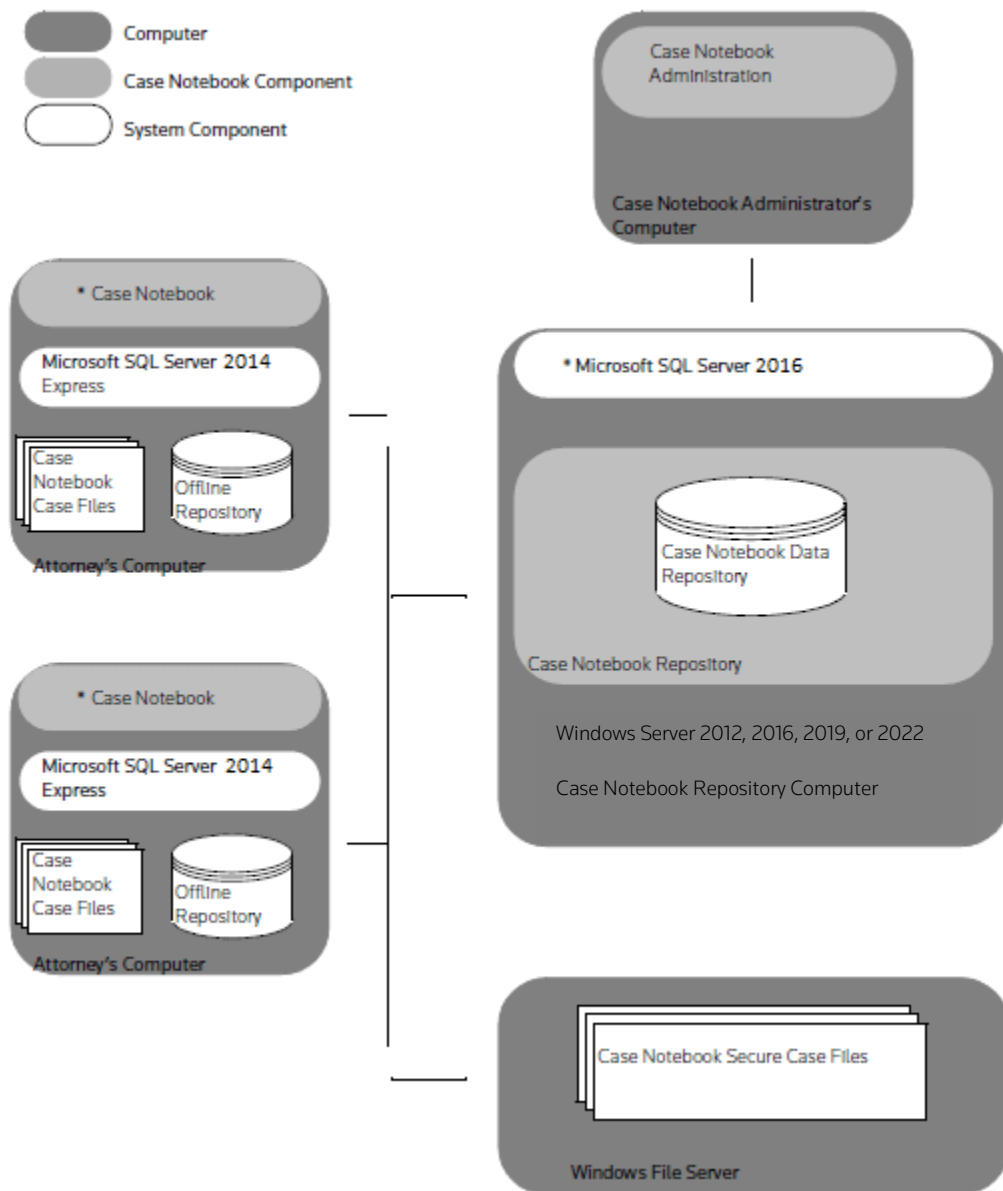
Instance 10: Msiexec.exe /x{90023C8E-2E0C-41DD-B3C1-A538E1CE8655} /qb

If you want to perform a silent uninstallation for a different version of these products, call Customer Technical Support at 1-800-290-9378. You can also visit the Case Notebook customer support page at <https://legal.thomsonreuters.com/en/support/case-notebook>.

6 Appendix A: Components of the Case Notebook Application Suite

LAN components: SQL Server, File Server, and Case Notebook Client on workstation.

There should not be any WAN components in this type of deployment. For WAN access to the repository, refer to Appendices B and C.

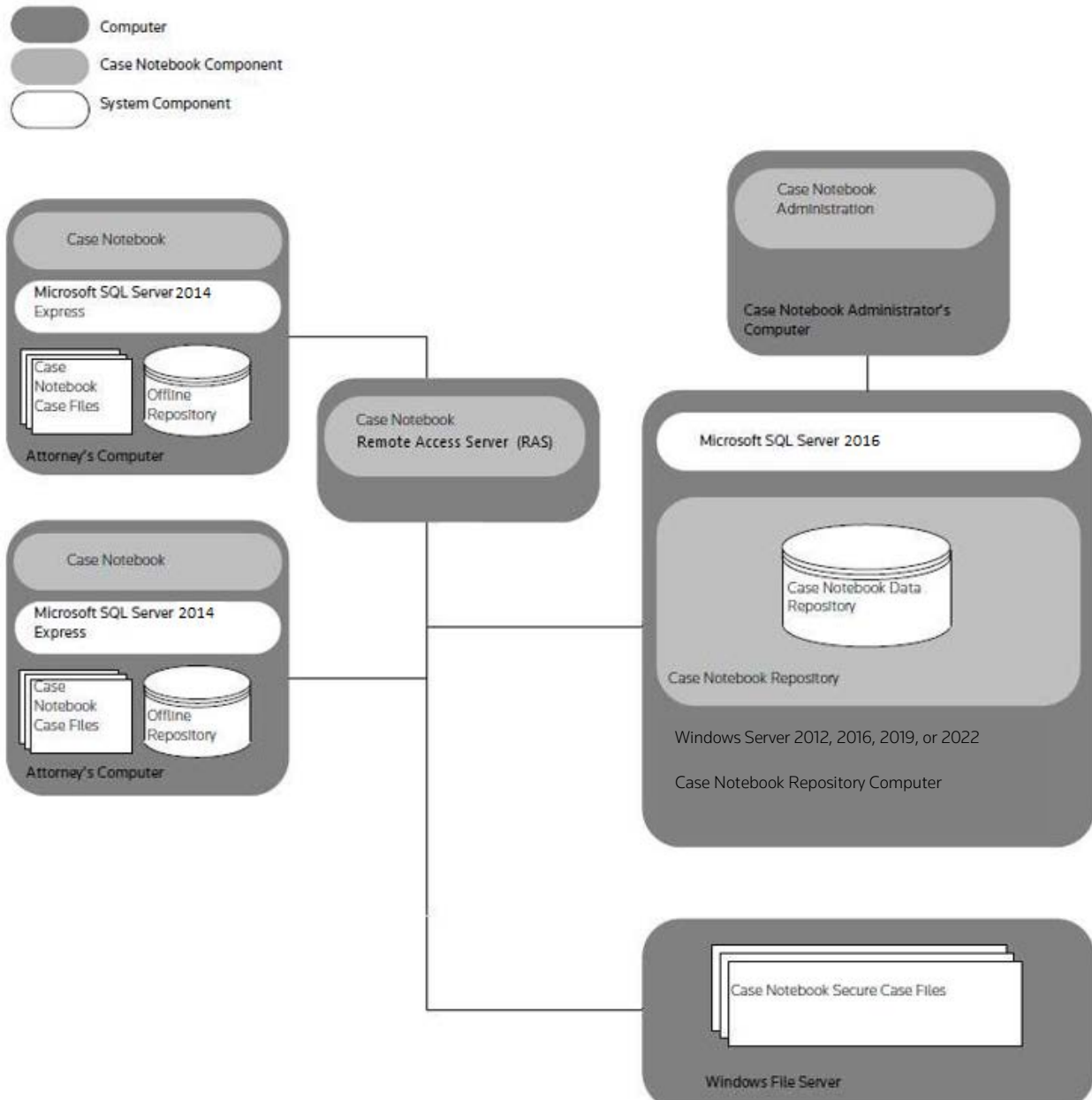


- The file server and the SQL server can be on separate computers if they are on the same LAN.
- The Case Notebook client needs to be on the LAN.

7 Appendix B: Components of the Case Notebook Remote Access Service (RAS)

LAN components: SQL Server, File Server, and RAS Server.

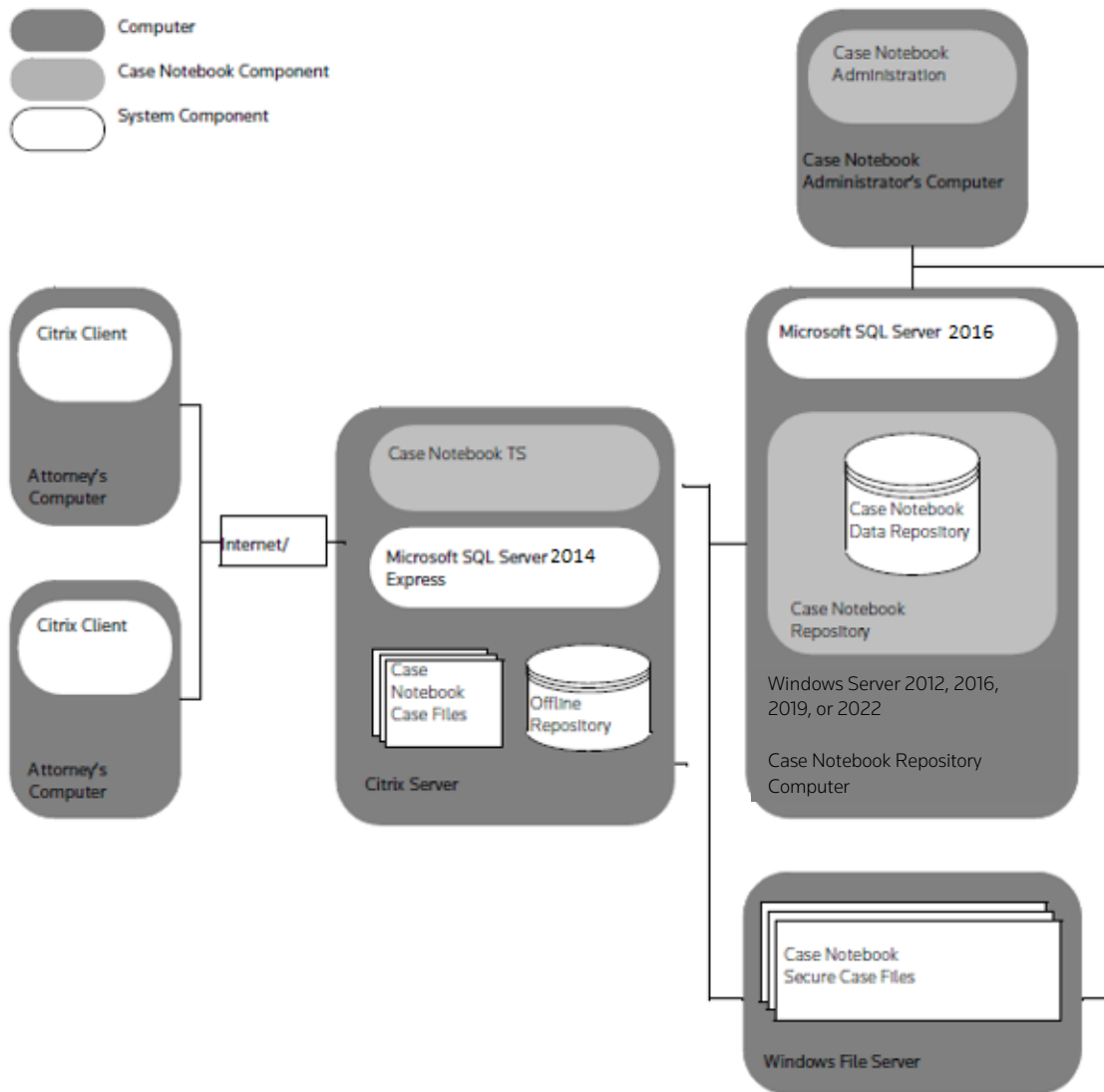
WAN components: Case Notebook client connecting through RAS to access the repository.



Note: The top Case Notebook client is not on the LAN, and therefore is accessing the server through RAS. The bottom Case Notebook client is on the LAN, and is not accessing the server through RAS.

8 Appendix C: Components of Case Notebook Terminal Service

LAN components: SQL Server, File Server, and Terminal Service (Citrix) Server. WAN components: Workstation using Citrix client to log on to the Citrix server.



* The file server and the SQL server can be on separate computers if they are on the same LAN.

