Juris Suite Installation Guide

Version 2.8



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Table of Contents

Introduction	4
Planning and Preparation	4
System Requirements	
Juris Database Backup	
Juris Support Contact Information	
Installing the Juris Suite Server	5
Performing Pre-Installation Procedures	5
Running the Database Revision Update Utility	5
Uninstalling the Existing Juris Suite Server	5
Downloading the Installation Files	6
Installing the Server Software	6
Verifying IIS Compatibility (Windows Server 2008 Only)	
Updating the Juris Suite Updater Website Settings	
Installing the Juris Suite Deployment Manager	17
Configuring the Juris Suite Deployment Manager	
Specifying the Staging Path	
Specifying the Last Version Deployed	
Specifying the Web Connect URL	
Specifying Juris Suite Configuration Settings	
Resolving a Potential Chart of Accounts Issue	
Deploying the Juris Suite Updates	
Configuring and Starting the Juris Suite Services	
Enabling Juris Suite to Write to the Windows Event Log	41
Configuring and Using the JurisWebAPI	41
Enabling PUT and DELETE	41
Updating the JurisWebAPI Help File	43
Installing the Juris Suite Client	44
Uninstalling the Existing Juris Suite Client	
Installing the Client Software	
Configuring the Client	
Configuring Firm Settings	
Using the Synchronize Schemas Feature	
Enabling Juris Suite to Write to the Windows Event Log	
Performing Optional Juris Suite Client Configurations	
Creating a Pre-populated Cache	
Publishing the Juris Suite Dashboard Metrics	
Importing a Cache	57
Preparing for First Use	

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Introduction

Welcome to the installation guide for Juris Suite 2.7. This document provides instructions installing and configuring a new instance Juris Suite. If you are upgrading your installation, this guide will be useful, but contains additional instructions that will not apply to your situation. There is a separate upgrade guide available on the Juris Support Center.

Planning and Preparation

System Requirements

It is highly recommended that you review the system requirements on the Juris Support Center before attempting to install Juris Suite.

In general, the following information is described on this web site:

- Software that must be installed prior to installing and configuring Juris Suite (mainly Juris).
- Supported versions of Windows
- □ Supported versions of SQL Server
- Database size requirements
- □ Supported versions of Internet Information Services (IIS)
- Necessary hard drive space
- **Q** Required privileges for the user installing Juris Suite

Juris Database Backup

After the checklist for hardware and software requirements has been met, it is considered a best practice (and *highly recommended*) that you backup your existing Juris database. For more information, refer to the Juris online help, which is available from the Juris Support Center.

Juris Support Contact Information

By Phone: 877-377-3740

Juris Support Center: http://support2.lexisnexis.com/juris

Additional How-To Information: http://www.juris.com/jurishelp

Installing the Juris Suite Server

The installation of the Juris Suite server involves completing a few pre-installation steps, installing the server software via the installation wizard, and completing the necessary post-installation configuration.

Performing Pre-Installation Procedures

The following procedures need to be reviewing and completed (when necessary) prior to installing the Juris Suite software.

Running the Database Revision Update Utility

If your firm is new to Juris (you did not upgrade from a previous version), you must run the Database Revision Update before installing Juris Suite.

- 1. Verify that you are logged into the computer where the Juris database is installed, and that you are the administrator or a user with administrative privileges.
- 2. Access the Database Revision Update tool using one of the following methods, based on your operating system:
 - Windows 7 / Server 2008: Click Start, click All Programs, click Juris, click Administrative Tools, and click Database Revision Update.
 - Windows 8 / Server 2012: Search for Juris, and click Database Revision Update in the search results.

The tool is opened.

- 3. If necessary, select the appropriate company from the displayed list.
- 4. Click the Update button.

You are prompted to make a backup copy of the database. This step is not required, but is strongly recommended. For more information, refer to the Juris online help.

5. When the update is complete, click **Close**.

Uninstalling the Existing Juris Suite Server

If you have an earlier version of the **Juris Suite Server** installed, you must uninstall it before installing the current version. To uninstall the server, complete the following:

- 1. Open the Windows Control Panel.
- 2. Click Add or Remove Programs. The Add or Remove Programs window opens.
- 3. Click JurisSuiteServer in the list of installed programs to highlight it.
- 4. Click the **Remove** button.
- 5. Click Yes to confirm the removal of the software from your computer.

The software is uninstalled.

6. Once the item is removed, close the Add or Remove Programs window.

Downloading the Installation Files

Before you can install the Juris Suite server, you need to download the files to the computer that will host the software.

1. Using a web browser, navigate to the following website:

http://support.lexisnexis.com/Juris/

- 2. In the Browse Topics list on the left side of the website, click Downloads.
- 3. In the **Products** list, click the **Juris Suite 2.7 (Current)** link.
- 4. Follow instructions on the site to save the installation files to a shared location.
- 5. Unzip the file to gain access to the individual Juris Suite installation files.

Installing the Server Software

Once you have completed all of the pre-installation requirements, including downloading the Juris Suite installation file, you can start the installation wizard, which will guide you through the Juris Server installation process.

- Verify that you have downloaded the Juris Suite installation file package from the following website: http://support2.lexisnexis.com/juris
- 2. Verify that you have your license information.
- 3. Verify that you are logged into the computer that will host the Juris Suite server, and that you are the administrator or a user with administrative privileges.
- 4. Navigate to the location of the Juris Suite Server installation files that you downloaded earlier.
- 5. Right-click the **JurisSuiteServer.exe** file, and select **Run as administrator** from the menu that appears.
- 6. If prompted, install the Microsoft .NET Framework 4.5 Web environment.

Note: This screen only appears if you do not have the Microsoft .NET Framework 4.5 currently installed on your machine. This software is included with Windows Server 2012 and Windows 8.

7. If prompted, click **Run** to verify the file's execution.

The Juris Suite Server installation wizard appears showing the Welcome screen.

₿	JurisSuiteServer Installation	n 💌
Welcome to the Install JurisSuiteServer	IShield Wizard for	🕐 LexisNexis
The InstallShield(R) Wizard	l will install JurisSuiteServer on your con	nputer. To continue, click Next.
WARNING: This program is InstallShield	protected by copyright law and internative copyright law and inter	ational treaties. Next > Cancel

8. Click Next.

The License Agreement screen appears.

谩	JurisSuiteServer Installation	x
License Agreement	箯 LexisNo	exis [.]
IMPORTANT: FOR SUBSCI THIS COMPONENT SHALL AGREEMENT. FOR ALL OT LexisNexis, a division of This Software Agreemen (either an individual or a accompanies this Agreen based services, if any ("F Capitalized terms are de	RIBERS OF JURIS® FROM LEXISNEXIS, DOWNLOADING OF BE GOVERNED UNDER THE TERMS OF THE SUBSCRIPTION THERS, THE FOLLOWING SHALL APPLY. Reed Elsevier Inc., ("Company") owns this software. ht ("Agreement") is a legal agreement between you single entity) and Company for the software that ment, which includes associated media and internet- Product"). fined in the last section of this Agreement.	~
 ✓ I accept the terms in the I ● I do not accept the terms 	icense agreement Prin in the license agreement	t
1115talioniela	< Back Next > Canc	el

9. Click I accept the terms in the license agreement and click Next.

The Customer Information screen appears.

₿	JurisSuiteServer Installation	×
Customer Information		🜔 LexisNexis [.]
User Name:		
Organization:		
Install this application for	:	
Anyone w Only for a	ho uses this computer (all users)	
InstallShield		
	< Back Net	xt > Cancel

10. Specify the appropriate information, and click Next.

The Setup Type screen appears.



- 11. Perform one of the following actions:
 - a. If you are installing Juris Suite on the local C: disk drive on your system, verify that **Complete** is selected and click **Next**.
 - b. If you are installing Juris Suite on any other disk drive, click **Custom**, and click **Next**.
- 12. If you selected the **Custom** setup type, specify the installation disk drive.
 - a. From the Custom Setup screen, click the Updater entry under Juris Suite IIS Products.
 - b. Select the **This feature, and all sub features, will be installed on local hard drive** option.

🖁 JurisSuiteServer	Installation	2
Custom Setup		🌈 LexisNexis
Click on an icon in the	list below to change how a feature is instal	led. Feature Description
	Updater	This product should be installed
	This feature will be installed on local hard	drive.
	This feature, and all subfeatures, will be i	installed on local hard drive. 🔨
×	This feature will not be available.	
	Alert Service Distribution Service	
Install to:		
		Change,
nstallShield		

c. In the bottom portion of the screen, click the **Change** button.

The Change Current Destination Folder screen appears.

- d. Select the installation disk drive and location.
- e. Click OK.

You are returned to the Custom Setup screen.

f. Click Next.

The Ready to Install the Program screen appears.



13. From the Ready to Install the Program screen, click Install.

The files are installed. Once the installation is finished, the Wizard Completed screen appears.

P JurisSuiteServer Installation	×
InstallShield Wizard Completed	🍘 LexisNexis
The InstallShield Wizard has JurisSuiteServer. Click Finish	successfully installed to exit the wizard.
Show the Windows I	Installer log
InstallShield < Back	Finish Cancel

14. Click Finish.

Verifying IIS Compatibility (Windows Server 2008 Only)

You need to verify that the Internet Information Services (IIS) 6 Management Compatibility settings are active on your server.

Note: In most cases, these options will already be selected and active.

- 1. Click **Start**, point to **Administrative Tools**, and click **Server Manager** The Server Manager dialog box appears
- 2. In the pane on the left side of the interface, expand the **Roles** node.
- 3. Right-click the **Web Server (IIS)** entry, and click **Add Role Services**. The Select Role Services dialog box appears.
- 4. In the **Role services** list in the middle of the dialog box, locate the **IIS 6 Management Compatibility** section
- 5. Verify that each of the following check boxes is selected (even if grayed-out):
 - IIS 6 Management Compatibility
 - IIS 6 Metabase Compatibility
 - IIS 6 WMI Compatibility
 - IIS 6 Scripting Tools
 - IIS 6 Management Console
- 6. Close the Select Role Services dialog box.
- 7. Click Yes to confirm.
- 8. Close the Server Manager dialog box.

Updating the Juris Suite Updater Website Settings

Once the Juris Server software has been installed, you need to access your server's Internet Information Services (IIS) settings and verify that the .config file extensions are properly specified.

- 1. Access the Internet Information Services (IIS) Manager dialog box using one of the following options, based on your operating system.
 - Windows Server 2008 / Window 7: Click Start, point to Administrative Tools, and click Internet Information Services (IIS) Manager.
 - Windows Server 2012 / Windows 8: Search for IIS, and click Internet Information Services (IIS) Manager in the search results.

The Internet Information Services (IIS) Manager dialog box appears.

- 2. Expand the main node.
- 3. Expand the Sites and Default Web Site nodes.
- 4. Click the JurisSuiteUpdater.entry.

Connectio	ns
😪 - 📃	2 😪
📲 Star	t Page
⊿ . 🛀 201	2R2STD (SKYTAP-2012R2\Adminis
6	Application Pools
⊿ - 💽	Sites
4	Default Web Site
	▶
	JurisDistributedReports
	JurisSuiteUpdater
	> JurisSuiteWebConnect
	▶ 💮 JurisWebAPI

5. On the right side of the dialog box, in the **IIS** section, double-click **Request Filtering**.



Note: In some instances, Request Filtering may not appear as shown even if it is installed. For more information, refer to the following article that discusses how to edit the Request Filtering file list via the ApplicationHost.config file: http://support.microsoft.com/kb/942045/

- 6. In the File Extension column, locate the .config entry.
- 7. If the entry is present, but set to False, you need to delete it and redefine it.
 - a. Right-click the existing .config entry.
 - b. From the menu that appears, click **Remove**.
 - c. Click Yes.
 - d. On the far right side of the dialog box, click **Allow File Name Extension**. The Allow File Name Extension dialog box appears.
 - e. In the File name extension text box, type .config.
 - f. Click OK.

The entry is added, and is set to **True** as shown below.

🔓 File Name Ext	ensions 🔤	Rules	•::• Hidden Segments	URL	🥖 HTTP Verbs	憎 H
File Extension	Allowed					
.config	True					

- 8. If the entry is not present, you need to add it.
 - a. On the far right side of the dialog box, click **Allow File Name Extension**. The Allow File Name Extension dialog box appears.
 - b. In the File name extension text box, type .config.
 - c. Click OK.

The entry is added, and is set to **True** as shown below.

👌 File Name Ext	ensions	F	Rules	0630	Hidden Segr	ments	🔁 URL	4	HTTP Verbs	H H
File Extension	Allow	/ed								
.config	True									

9. Close the Internet Information Services (IIS) Manager dialog box.

Installing the Juris Suite Deployment Manager

The Deployment Manager is used to upgrade the Juris database and provides access to updates for installed Juris Suite clients.

Important: This feature is designed to be installed only on the system running SQL Server.

- 1. Verify that you are logged into the system running SQL Server for your Juris installation.
- 2. Verify that the extracted Juris Suite installation files are available.
- 3. Navigate to the Juris Suite installation files.

4. Double-click the **JurisSuiteClient.exe** file.

The Juris Suite Client installation wizard appears showing the Welcome screen.

₿	Juris Suite Client Installation	x
Welcor	me to the InstallShield Wizard for Juris Suite Client 🛛 🌔 LexisNexis	s.
The Insta	allShield(R) Wizard will install Juris Suite Client on your computer. To continue, dick Next	t.
WARNING	G: This program is protected by copyright law and international treaties.	
InstallShiel	ld	
	< Back Next > Cancel	

5. Click Next.

The License Agreement screen appears.

₿	Juris Suite Client Installation	X
License Agreement Please read the followin	ng license agreement carefully.	CexisNexis [.]
IMPORTANT: FOR SUBS THIS COMPONENT SHAL AGREEMENT. FOR ALL LexisNexis, a division of This Software Agreem (either an individual or accompanies this Agre based services, if any Capitalized terms are of	CRIBERS OF JURIS® FROM LEXISNEXIS, DOWNLO L BE GOVERNED UNDER THE TERMS OF THE SUB OTHERS, THE FOLLOWING SHALL APPLY. of Reed Elsevier Inc., ("Company") owns this tent ("Agreement") is a legal agreement betw a single entity) and Company for the software eement, which includes associated media and ("Product").	DADING OF A SSCRIPTION software. veen you e that I internet-
O Laccept the terms in th	e license agreement	Print
 I do not accept the terr 	ns in the license agreement	
InstallShield ————	<back next=""></back>	Cancel

6. Click I accept the terms in the license agreement, and click Next.

<u>i</u>	Juris Suite Client Installation	x
Customer Information Please enter your infor	n mation.	CexisNexis
<u>U</u> ser Name: Windows User		
Organization:		
Install this application f Anyone	or: who uses this computer (all users)	
O Only for	r me (Windows User)	
	< Back N	lext > Cancel

The Customer Information screen appears.

7. Enter the appropriate information, and click **Next**.

The Setup Type screen appears.



8. Click Administrator, and click Next.

1 ¹	Juris Suite Client Insta	tallation	x
Custom Setup Select the program fea	atures you want installed.	箯 LexisNe	kis [.]
Click on an icon in the list l	pelow to change how a feature is nt Manager	s installed. Feature Description This feature requires 0KB on your hard drive.	
Install to: InstallShield	Space < Back	Change.	

9. Verify that the **Deployment Manager** entry is specified for installation, as highlighted below.





and select **This feature will be installed on local hard drive.**). For more information, see Installing the Juris Suite Client.

	X -	Juris Suite	Feature Description		
i		This feature will be installed on local hard drive.			
	•	This feature, and all subfeatures, will be installed on local hard drive.			
	×	This feature will not be available.			
			your hard drive.		

10. Click Next.

The Ready to Install the Program screen appears.

,₽	Juris Suite Client In	stallation	x
Ready to Ir The wizard	nstall the Program is ready to begin installation.	箯 LexisNe	exis [.]
Click Install to	begin the installation.		
If you want t exit the wizar	o review or change any of your installation rd.	n settings, dick Back. Click Cancel to	
InstallShield —	< Back	Install Canc	el

11. Click Install.

The files are installed. Once the installation is finished, the Wizard Completed screen appears.

7	Juris Suite	e Client Insta	allation			x
InstallShield Wizard Co	ompleted			🌔 Leo	(isNexis	
	The Ins Client. (tallShield Wizard Click Finish to exit	has successfull t the wizard.	y installed J	uris Suite	
InstallShield						
		< Back	Finish		Cancel	

12. When the installation has completed, click **Finish**.

Configuring the Juris Suite Deployment Manager

Once you have installed the Deployment Manager, you need to configure it to properly retrieve the needed Juris Suite updates.

- 1. Start the JurisSuite Deployment Manager using one of the following methods:
 - Windows 7 / Server 2008: Click Start, point to All Programs, click Juris, and click Juris Suite Deployment Manager.
 - Windows 8 / Server 2012: Search for Deployment, and click Juris Suite Deployment Manager from the search results.

The Deployment Manager dialog box appears.

9	Deplo	ymei	nt Manager	_		x
Deployment						
Version currently avail	able at Juris					
Server URL:	http://updates.ju	ris.com	/JurisSoftware2400/Updater	Service.	asmx	Test
Version:	2.60.1.66	as of	11/26/2014 8:57:50 AM			
Release Notes			Check Version	Downloa	d Versio	n 🗸
Last version download	ed					
Staging Path: 🥼						
Version: 🧘	N/A]				
Last version deployed						
Company:	My Law Firm		\checkmark	License	:	Valid
Version: 🥼	N/A	SQL:	Standard Edition (64-bit)-1	DB Size	: 38.	50 MB
Web Update URL:	http://ServerNam	ne/Juris	SuiteUpdater/UpdaterService	e.asmx		Test
Web Connect URL:	http://ServerNam	ne/Juris	SuiteWebConnect			Test
Web Update Path: 🔔						•••
Juris Suite Configura	ation Settings					
Data Path:						
Cache Enabled:	Yes 🖂 Inter	val:	5 荣		Apply	
About DM	Lock Settings				Next >	>>

2. Click the Check Version button.

1	Deployment Manager
Deployment	
-Version currently av	/ailable at Juris
Server URL:	http://updates.juris.com/JurisSoftware2400/UpdaterService.asmx
Version:	2.70.0.296 as of 12/4/2014 6:03:21 AM
Release Notes	Check Version Download Version
Last version downlo	oaded
Staging Path:	C:\JurisSuiteStaging
Version:	A N/A

The version number is verified, and the current date and time is added to the **as of** text box above the button.

Note: Your version numbers may differ from the image above. It is only used as an example. If you want to review the release notes for the version listed, click the **Release Notes** button, which launches a browser window.

Specifying the Staging Path

You need to specify the staging path, which is used for storing deployment files. Workstations will not need access to this folder.

1. Click the Browse button (...) adjacent to the Staging Path text box.

The Browse For Folder dialog box appears.

2. Navigate to the top of the drive into which Juris Suite was installed. For example, the top of the C: drive, as shown below.

Browse For Folder	٢
Select local folder for downloaded versions	
Floppy Disk Drive (A:)	
🔺 🚢 Local Disk (C:)	
Dinetpub	
Juris_Shared	
PerfLogs	
🛛 🖟 Program Files 🔤	
Program Files (x86)	
🔒 Temp —	
Disers	
▷]] Windows	
▷ 🔮 DVD Drive (D:) 🗸 🗸	
Make New Folder OK Cancel	

3. At the bottom of the dialog box, click the **Make New Folder** button, and name the new folder **JurisSuiteStaging**, as shown below.



4. Click OK.

The new folder appears in the **Staging Path** text box.

	Deployment Manager 📃 🗖 🗙
Deployment	
Version currently a	vailable at Juris
Server URL:	http://updates.juris.com/JurisSoftware2400/UpdaterService.asmx Test
Version:	2.60.1.66 as of 11/26/2014 9:01:12 AM
Release Notes	Check Version Download Version V
Last version downlo	paded
Staging Path:	C:\JurisSuiteStaging 🔶 🔤
Version:	1 N/A

Now that the staging path is set, you can begin downloading updated files. The files will be stored in the specified folder.

5. Click the **Download Version** button.

9	Deployment Manager			x
Deployment				
Version currently availa	ble at Juris			
Server URL:	http://updates.juris.com/JurisSoftware2400/UpdaterServi	ice.as	mx	Test
Version:	2.60.1.66 as of 11/26/2014 9:01:12 AM			
Release Notes	Check Version Down	load V	ersio	1 V
Last version downloade	d	1		
Staging Path:	C:\JurisSuiteStaging			···
Version:	N/A	1		

The Deployment Manager message appears, asking if you are sure you want to download the latest version of Juris Suite.

	Deployment Manager X
2	A new Deployment Manager has been detected and will be included as part of this download. Are you sure you want to download the latest version of JurisSuite?
b	Yes No

6. Click Yes.

The files are downloaded. This process can take up to an hour, depending on your Internet connection speed. The lower portion of the Deployment Manager displays the overall progress of the files being downloaded.

Juris Suite Config Data Path:	uration Settings	
Cache Enabled:	Yes 🗸 Interval: 5 🔄	Apply
Downloading	iles for JurisSuite from the server	
Downloading 18 of 2	268 files	
DevExpress.Cha	rts.v8.2.Core.dll: 18.71 KB of 29.70 KB	
About DM	Lock Settings	Next >>

A message appears when the update (file download) is complete.

If the file download failed, a download log is displayed at the bottom of the Deployment Manager, which may be useful in determining the cause of the failure.

7. Click OK.

The Deployment Manager is restarted.

Specifying the Last Version Deployed

Now you need to configure the settings in the **Last version deployed** area. If you have multiple licenses that are licensed for Juris Suite, you will have to come back to this section after deploying and select the next company to be deployed.

- 1. In the **Last version deployed** area, use the **Company** drop-down list to select the company against which you will be deploying Juris Suite.
- 2. Verify that **Valid** appears in the **License** entry.
- 3. For servers running SQL Server 2005/2008 Express Edition, examine the value in the **DB Size** entry. You will not want to deploy if this size is *larger than 3.3 GB*, as doing so will put the database very close to the 4 GB limit after deployment. Your firm will have to upgrade to a full edition of SQL Server 2005/2008 in order to deploy Juris Suite.

Note: If you are using SQL Server 2008 R2 Express, the database size limit is 10 GB.

- 4. In the **Web Update URL** text box, replace **ServerName** with the name of the system that is now running the Juris Suite Server.
- 5. Click the **Test** button to the right of the path entry to validate the URL.

A message appears, confirming that the path is valid.

Note: If the site does not validate, be sure that all pre-install requirements were completed. If the site still does not validate, contact Juris Support.

6. Click OK.

A message about replacing the client path appears.

7. Click Yes.

Specifying the Web Connect URL

The **Web Connect URL** setting is only used if a remote user *does not have a direct connection* to the network (i.e., VPN clients). If there will be workstations requiring this feature, complete the procedure below. Otherwise, continue to Specifying Juris Suite Configuration Settings.

- 1. In the Web Connect URL text box, replace **ServerName** with the outside IP address that remote users will be able to access.
- 2. Click the Test button to the right of the path entry to validate the URL.

Note: If the site does not validate, be sure that all pre-install requirements were completed. If the site still does not validate, contact Juris Support.

3. Click OK.

Specifying Juris Suite Configuration Settings

The settings in the **Juris Suite Configuration Settings** area apply globally and are optional. However, the settings are particularly useful for Citrix or Terminal Server environments. If any changes are made to this area, be sure to click **Apply** to set the change.

- 1. Alter any of the following settings, as desired:
 - **Data Path**. This setting is not required for regular environment setups. It is to be used as an alternate path for Juris support files (like cache database).

For example: C:\Juris or C:\Juris\@profileuser

You may also use a UNC path to if the user has a **Home** folder setup on the network. If **@profileuser** is used, it will be replaced with the current user's network login. This setup is ideal for a Citrix or Terminal Server environment where you want to designate the data location.

- **Cache Enabled**. This setting is designed to help speed up data requests for users on Web Connect. It is set to **Yes** by default. It should be changed to **No** unless the majority of the firm utilizes laptops that will be using the Web Connect feature. Citrix and Terminal Server environments do not require cache to be enabled since they are on the network already.
- **Interval**. This setting is the amount of time between cache synchronizations. It should be increased if workstations are constantly synchronizing the cache, meaning that synchronizations are overlapping and not completing.
- 2. Click Apply to save any changes.

Resolving a Potential Chart of Accounts Issue

There exists a potential issue for some clients that must be addressed before you deploy your database. Under **Chart of Accounts**, if there is a **Conf Def Account** present, it may conflict with an existing **Chart of Account** number the customer may have in place (as shown below).

Note: The following two examples show Juris version 2.6.

Uuris\Tables\Chart of Accts.					
Form View Tools Help					
🗅 🖨 🖬 🛍 🗙 🍡	5- HE 🔳 🧼				
🛒 Juris	Description	Account	Туре		
🖃 🗊 Tables	MAIN	0103	Balance Sheet		
- 5 Sub Accounts	"Conv Def Account	0103	Balance Sheet		
Chart of Accts.	Retained Earnings	1000	Balance Sheet		
Bank Accounts	Petty Cash	1001	Balance Sheet		
Offices	00 Office Furniture	1002	Balance Sheet		
Personnel Types	Depreciation	1003	Balance Sheet		
Timekeepers	Cash-Wachovia	1004	Balance Sheet		

Before deploying, one of the duplicate accounts must be re-numbered so that there are no duplicates. (as shown below). Failure to perform this step will cause the Juris Suite deployment to fail. Once you complete this step, proceed with the deployment.

Juris\Tables\Chart of Ac	cts.		
Form View Tools Help			
D 🖨 🖬 🗈 🛛 🔤	7- HE 🔳 🧼		
🛒 Juris	Description	Account	Туре
🖻 🗐 Tables	IOD MAIN	0103	Balance Sheet
Sub Accounts	*Conv Def Account	9998	Balance Sheet
Chart of Accts.	Retained Earnings	1000	Balance Sheet
Bank Accounts	Petty Cash	1001	Balance Sheet
Offices	00 Office Furniture	1002	Balance Sheet
Personnel Types	Depreciation	1003	Balance Sheet
Timekeepers	Cash-Wachovia	1004	Balance Sheet

Deploying the Juris Suite Updates

Now that you have installed and configured the Deployment Manager and downloaded all of the updated Juris Suite files, you need to deploy the changes contained in these updated files.

- 1. Verify that you have completed configuring the settings on the main Deployment Manager screen as described in Deployment Manager Configuration.
- 2. (optional) Click the in **Lock Settings** check box at the bottom of the Deployment Manager to prevent all displayed settings from being changed.
- 3. At the bottom of the Deployment Manager, click the **Next** button to proceed with the deployment phase.

The Deployment screen appears. It displays the **Company Name**, **Before** and **After** version information, and a list of **Deployment Steps**.

eployment	
Company: My Law Firm Version: [Before: 2.70.0.29	6] [After: 2.70.0.296]
Deployment Steps	
Juris: Read Deployment Documentation	•
Juris: Prepare Deployment Package	•
Juris: Stop all Juris Services	•
Juris: Turn on Maintenance Mode	•
Database: Set User Count to Zero	•
Database: Set Restricted Mode On	•
Database: Perform Backup	•
Database: Validation Checks	•
Database: Deploy Database Updates	•
Database: Validation Checks	•
Database: Create Juris Users	•
Database: Clear Restricted Mode	•
Database: Import Active Information Data	•
Database: Update Application Version	•
Juris: Turn off Maintenance Mode	•
Juris: Deploy Staging files to Client Path	•
Juris: Apply JurisSuite Configuration Settings	•
Last Deployment Completion Time: 00:10:50	Deploy All 🗸

4. Click the arrow on the right portion of the **Deploy** button.

Several options appear.

Juris: Deploy Staging files to Client Path	
Juris: Apply JurisSuite Configuration Settings	•
Last Deployment Completion Time: 00:10:50	Deploy All
	Deploy Database
	Deploy Files
	100 D 200 D 200 D 200 D

- 5. Select one of the following options:
 - (default) **Deploy All**. Ensures that all of the components are updated properly by deploying both database and application files.
 - **Deploy Database**. Allows you to simplify the process for clients that have multiple databases. Each database must be deployed with the updates. Use the **Company** drop-down list on the initial **Deployment Manager** screen to allow for this database selection.
 - **Deploy Files**. Deploys all of the application (non-database) files that need to be updated.
- 6. Click the button, which is now labeled with the option you selected in the previous step.

A dialog box appears, displaying information about making a backup of the database during the deployment.

Deployn	nent Manager
2	Before you execute deployment, ensure that all users are out of Juris and JurisSuite. Any users who do not exit the programs will be disconnected from the database as part of the process. If you wish to delay deployment, press 'Cancel'. There is an option to make a backup of the database as part of this process. If you choose 'Yes', and the deployment fails on one of the steps in the process, you will be prompted to automatically restore the backup, otherwise, you will have to manually restore the backup.
	After deployment has completed, press the 'Next' button to review the deployment log. This log has valuable information that can be used to help investigate any problems you may encounter. Do you wish to make a backup during the deployment process?
4	Yes No Cancel

7. Click Yes.

The next screen is a review of documents (including this one) and acceptance of the review. Included are the *Juris System Requirements*, the *Juris Suite Upgrade Guide* and the *Juris Suite Installation Guide*.



Note: You must have a program to view the **PDF** format files. Adobe Acrobat Reader is the most common and is available as a free download.

- 9. Download and read the appropriate documents.
- 10. At the bottom of the dialog box, click the I have read and understand the Hardware Requirements and Installation Guide(s) check box.

	Louis Alexin Processor Windows Server 2005 112 MIS 601, Lerver 2005 Minimum 40/8 RAM plus 32 MB of RAM per active user	Note: Juris is not supported on the Home Edition of Windows XP, Windows Vista, or Windows 7.	
	TOTAL PRACTIC Ban Syndynwer, Reservit Dickicu, R	f SOLUTIONS en Megane Organic Ecology	
Juris System Requirements	JurisSuite Installation Guid	e JurisSuite Update Guide	
☐ I have read and understa Guide(s).	nd the Hardware Requireme	nts and Installation	Cancel

11. Click OK.

The deployment begins and the individual steps are marked with a check mark as they are completed.

12. When the deployment completes, a message appears stating that they deployment was successful.

Note: If deployment failed, click **Yes** to restore the backup created. After restoring, click **Next**, save the error log (using the **Save Log** button) and contact Juris Support.

13. Click **Yes** to confirm that you want to delete the backup that was created during the deployment process.

Your Deployment Manager dialog box should appear as shown below, with all steps completed.

eployment			
Company: My Law Firm Version	: [Before: 2.70.0.296]	[After: 2.70.0.296]	
Deployment Steps			
Juris: Read Deployment Documentation			~
Juris: Prepare Deployment Package			~
luris: Stop all Juris Services			~
Juris: Turn on Maintenance Mode			~
Database: Set User Count to Zero			~
Database: Set Restricted Mode On			~
Database: Perform Backup			~
Database: Validation Checks			~
Database: Deploy Database Updates			~
Database: Validation Checks			~
Database: Create Juris Users			~
Database: Clear Restricted Mode			~
Database: Import Active Information Da	ta		~
Database: Update Application Version			~
luris: Turn off Maintenance Mode			~
Juris: Deploy Staging files to Client Path			~
Juris: Apply JurisSuite Configuration Set	tings		~
Current Deployment Time Elapsed:	00:12:19	Deploy Al	I V
		<u> </u>	

14. Click Next.

A deployment summary appears, showing you all the tasks that were executed and whether or not they were completed successfully.

Company: My Law Firm Version: [Before: 2.70.0.296] [After: 2.70.0.296] Deployment Log 12/4/2014 6:59:26 AM: Juris Suite Deployment Manager version 2.70.0.296 12/4/2014 6:59:26 AM: Company: My Law Firm Version: [Before: 2.70.0.296] [After: 2.7 12/4/2014 6:59:26 AM: Deployment started 12/4/2014 6:59:26 AM: Server URL = http://cert-juris.lexisnexis.com/JurisSoftware2400/Updat 12/4/2014 6:59:26 AM: Server URL = http://cert-juris.lexisnexis.com/JurisSoftware2400/Updat 12/4/2014 6:59:26 AM: Server Version = 2.70.0.296 12/4/2014 6:59:26 AM: Staging path = C: \JurisSuteStaging 12/4/2014 6:59:26 AM: Staging path = C: \JurisSuteStaging 12/4/2014 6:59:26 AM: Getting current Schema version from the database 12/4/2014 7:03:17 AM: Getting current Schema version from the database 12/4/2014 7:03:19 AM: Getting pre-validation scripts 12/4/2014 7:03:20 AM: Getting Requirements scripts 12/4/2014 7:03:20 AM: Getting Guenrated Procedure scripts 12/4/2014 7:03:20 AM: Getting Guenrated Procedure scripts 12/4/2014 7:03:22 AM: Getting Custom Procedure scripts 12/4/2014 7:03:22 AM: Getting Custom Procedure scripts 12/4/2014 7:03:22 AM: Getting Custom Procedure scripts 12/4/2014 7:03:28 AM: Getting Custom Data scripts 12/4/2014 7:03:28 AM: Getting Custom Data scripts 12/4/2014 7:03:28 AM: Getting Custom Data scripts 12/4/2014 7:03:30 AM: Creating JurisSOU user 12/4/2014 7:03:30 AM: Creating JurisSOU user 12/4/2014 7:03:30 AM: Creating JurisSOU user 12/4/2014 7:03:31 AM: Stopping Juris Suite Alert Service 12/4/2014 7:03:33 AM: Creating AthensDBO user 12/4/2014 7:03:33 AM: Creating JurisSOU user 12/4/2014 7:03:33 AM: Stopping Juris Suite Alert Service 12/4/2014 7:03:33 AM: Creating JurisSOU database 12/4/2014 7:03:33 AM: Creating JurisSOU user 12/4/2014 7:03:33 AM: Creating JurisSOU user 12/4/2014 7:03:33 AM: Stopping Juris Suite Alert Service 12/4/2014 7:03:33	ployment	
Deployment Log 12/4/2014 6:59:26 AM: Juris Suite Deployment Manager version 2.70.0.296	Company: My Law Firm Version: [Before: 2.70.0.296] [After: 2.70.0.296]	
12/4/2014 6:59:26 AM: Juris Suite Deployment Manager version 2.70.0.296 ∧ 12/4/2014 6:59:26 AM: Company: My Law Firm Version: [Before: 2.70.0.296] [After: 2.7 12/4/2014 6:59:26 AM: Server VEL = http://cert-juris.lexisnexis.com/JurisSoftware2400/Updat 12/4/2014 7:03:17 AM: User acknowledged reading supporting documentation. 12/4/2014 7:03:19 AM: Getting current Schema version from the database 12/4/2014 7:03:19 AM: Getting current Schema version from the database 12/4/2014 7:03:20 AM: Getting Requirements scripts 12/4/2014 7:03:20 AM: Getting Generated Procedure scripts 12/4/2014 7:03:20 AM: Getting Custom Data scripts 12/4/2014 7:03:20 AM: Getting Custom Data scripts 12/4/2014 7:03:27 AM: Getting Custom Data scripts 12/4/2014 7:03:28 AM: Getting Doging scripts 12/4/2014 7:03:28 AM: Getting Doging scripts 12/4/2014 7:03:28 AM: Getting Doging scripts 12/4/2014 7:03:30 AM: Creating AthensBO user 12/4/2014 7:03:30 AM: Creating AthensBO user 12/4/2014 7:03:31 AM: Stopping Juris Suite Distribution Service 12/4/2014 7:03:31 AM: Stoppi	Deployment Log	
12/4/2014 7:03:30 AM: Creating JurisRO user 12/4/2014 7:03:30 AM: Creating AthensRO user 12/4/2014 7:03:31 AM: RepairOrphanedUser(Juris9999009, AthensRO, AthensRO) 12/4/2014 7:03:31 AM: Stopping Juris Suite Alert Service 12/4/2014 7:03:31 AM: Stopping Juris Suite Alert Service does not exist or is not running. 12/4/2014 7:03:31 AM: Stopping Juris Suite Distribution Service 12/4/2014 7:03:31 AM: Stopping Juris Suite Distribution Service 12/4/2014 7:03:31 AM: Stopping Juris Suite Distribution Service 12/4/2014 7:03:32 AM: Set Restricted Mode On 12/4/2014 7:03:32 AM: Backing up Juris9999009 database 12/4/2014 7:04:01 AM: Processed 51352 pages for database 'Juris9999009', file 'Juris9999009' 12/4/2014 7:04:01 AM: Processed 51352 pages for database 'Juris9999009', file 'Juris9999009_log 12/4/2014 7:04:01 AM: BACKUP DATABASE successfully processed 51355 pages in 28.109 sec 12/4/2014 7:04:02 AM: Database intregrity check passed 12/4/2014 7:04:02 AM: Updating Database Requirements	12/4/2014 6:59:26 AM: Juris Suite Deployment Manager version 2.70.0.296 12/4/2014 6:59:26 AM: Company: My Law Firm Version: [Before: 2.70.0.296] [After: 2.7 12/4/2014 6:59:26 AM: Server URL = http://cert-juris.lexisnexis.com/JurisSoftware2400/Updat 12/4/2014 6:59:26 AM: Server Version = 2.70.0.296 12/4/2014 6:59:26 AM: Server Version = 2.70.0.296 12/4/2014 6:59:26 AM: Server Version = 2.70.0.296 12/4/2014 6:59:26 AM: Staging path = C:\JurisSuiteStaging 12/4/2014 7:03:17 AM: User acknowledged reading supporting documentation. 12/4/2014 7:03:17 AM: User acknowledged reading supporting documentation. 12/4/2014 7:03:19 AM: Getting current Schema version from the database 12/4/2014 7:03:19 AM: Getting current Schema version from the database 12/4/2014 7:03:19 AM: Getting current Firebird version from the database 12/4/2014 7:03:20 AM: Getting Requirements scripts 12/4/2014 7:03:20 AM: Getting Requirements scripts 12/4/2014 7:03:20 AM: Getting Schema scripts 12/4/2014 7:03:20 AM: Getting Custom Procedure scripts 12/4/2014 7:03:24 AM: Getting Custom Procedure scripts 12/4/2014 7:03:27 AM: Getting Custom Data scripts 12/4/2014 7:03:27 AM: Getting Standard Data scripts 12/4/2014 7:03:27 AM: Getting Security scripts 12/4/2014 7:03:28 AM: Getting Custom Scripts 12/4	
	12/4/2014 7:03:30 AM: Creating JurisRO user 12/4/2014 7:03:30 AM: Creating AthensRO user 12/4/2014 7:03:31 AM: RepairOrphanedUser(Juris9999009, AthensRO, AthensRO) 12/4/2014 7:03:31 AM: Stopping Juris Suite Alert Service 12/4/2014 7:03:31 AM: Stopping Juris Suite Alert Service does not exist or is not running. 12/4/2014 7:03:31 AM: Stopping Juris Suite Distribution Service 12/4/2014 7:03:31 AM: Stopping Juris Suite Distribution Service 12/4/2014 7:03:31 AM: Stopping Juris Suite Distribution Service does not exist or is not running. 12/4/2014 7:03:32 AM: Set Restricted Mode On 12/4/2014 7:03:32 AM: Backing up Juris9999009 database 12/4/2014 7:04:01 AM: Processed 51352 pages for database 'Juris9999009', file 'Juris9999009' 12/4/2014 7:04:01 AM: Processed 3 pages for database 'Juris9999009', file 'Juris9999009_log 12/4/2014 7:04:01 AM: Processed 3 pages for database 'Juris9999009', file 'Juris9999009_log 12/4/2014 7:04:01 AM: Pro-Validate database 12/4/2014 7:04:01 AM: Pre-Validate database 12/4/2014 7:04:02 AM: Database intregrity check passed 12/4/2014 7:04:02 AM: Updating Database Requirements	>

15. (optional) Click the Save Log button to save a version of the log. You are prompted to save the log file with a .txt file extension.

Note: You can also use the Copy Log button to send the contents of the log to your computer's clipboard.

- 16. Click **Finish** to close the Deployment Manager.
- 17. Click Yes to confirm the action.

Configuring and Starting the Juris Suite Services

This is a requirement for the Juris Suite Business Intelligence, Juris Suite Collections, and Juris Suite Core Reporting Snap Ins.

Tip: You can skip this section if these modules were not purchased and will not be used with Juris Suite.

- 1. Open the Services dialog box.
 - Windows 7 / Server 2008: to Start / Administrative Tools / Services
 - Windows 8 / Server 2012:
- 2. Locate the Juris Suite Alert Service and Juris Suite Distributions Service entries.



You need to configure each service individually.

3. Double-click the Juris Suite Alert Service entry.

The Juris Suite Alert Service Properties dialog box appears.

4. From the Startup type drop-down list, select Automatic.

Juris Suite Alert Se	ervice Properties (Local Computer)	? ×
General Log On	Recovery Dependencies	
Service name:	AlertsNTService	
Display <u>n</u> ame:	Juris Suite Alert Service	
Description:	Executes Juris Alerts.	
Pat <u>h</u> to executabl ''C:\Program Files	e: VJuris Suite Alerting Service/Juris,Win,Services,Alert.ex	ə"
Startup typ <u>e</u> :	Manual	3
Service status:	Disabled Stoppen	
<u>S</u> tart	Stop <u>Pause</u> <u>R</u> esume	
You can specify th from here.	he start parameters that apply when you start the service	,
Start para <u>m</u> eters:		
	OK Cancel <u>A</u> pp	y .

5. Click the **Start** button.

The service is started.

- 6. At the top of the dialog box, click the **Recovery** tab.
- 7. For each of the First failure, Second failure, and Subsequent failures drop-down lists, select Restart the Service.

Juris Suite Alert Service Prop	oerties (Local Computer) 🛛 📪 🗙
General Log On Recovery	Dependencies
Select the computer's respons	e if this service fails.
<u>F</u> irst failure:	Take No Action
Second failure:	Take No Action Restart the Service
S <u>u</u> bsequent failures:	Run a Program Restart the Computer
Reset fail c <u>o</u> unt after:	0 days
Restart ser <u>v</u> ice after:	1 minutes
Run program	
Program:	
	<u>D</u> I0wse
Command line parameters:	
Append fail count to en	d of command line (/fail=%1%)
	Restart Computer Options
	Testar compater options
	OK Cancel Applu

Your tab should appear as shown below.

Select the computer's resp actions.	onse if this s	ervice fails. <u>Help me set up recover</u> ,
First failure:	Restart	the Service
Second failure:	Restart	the Service
Subsequent failures:	Restart	the Service
Reset fail count after:	0	days
Restart service after:	1	minutes
Enable actions for stop	s with errors	Restart Computer Options
Program:		
		Browse
Command line paramete	ers:	mand line (/fail=%1%)

- 8. Click ${\bf OK}$ to close the dialog box and save your changes.
- 9. Repeat step 3 through step 8 for the **Juris Suite Distribution Service** and the **Juris Suite Collections Service** entries.

10. Review the Services dialog box, and confirm that both services are running.

Services (Local)	Ö Services (Local)				
					1
	Juris Suite Distribution Service	Name 🔺	Description	Status	Startup Type
	Strategies to provide the	😪 Internet Connection Sharing (ICS)	Provides n		Disabled
	Stop the service	🔍 IP Helper	Provides tu	Started	Automatic
	Pause the service	IPsec Policy Agent	Internet Pr		Manual
	restart the service	Juris Rapid Access Data Service	Updates R		Manual
		Juris Suite Alert Service	Executes J	Started	Automatic
	Description:	🔍 Juris Suite Collection Notification Service	Notify Coll		Manual
	Distributes Juris reports.	Juris Suite Distribution Service	Distributes	Started	Automatic
		KtmRm for Distributed Transaction Co	Coordinate		Manual
		Link-Layer Topology Discovery Mapper	Creates a		Manual
		Microsoft .NET Framework NGEN v2.0	Microsoft		Disabled
		Microsoft .NET Framework NGEN v2.0	Microsoft		Disabled
		Microsoft .NET Framework NGEN v4.0	Microsoft		Automatic (D
		Microsoft .NET Framework NGEN v4.0	Microsoft		Automatic (D
		Microsoft Fibre Channel Platform Regi	Registers t		Manual
		Microsoft iSCSI Initiator Service	Manages I		Manual
		Microsoft Software Shadow Copy Pro	Manages s		Manual
		G Multimedia Class Scheduler	Enables rel		Manual
		Q Net Msma Listener Adapter	Receives a		Disabled
		Anternand Estener Adapter	Receives a		Disabled
		Q Net Tro Listener Adapter	Receives a		Disabled
		Net Top Port Sharing Service	Provides a		Disabled
		Netlogon	Maintains a		Manual
		Network Access Protection Agent	The Netwo		Manual
		Network Connections	Manages c	Started	Manual
		Metwork Connections	manages 0	Started	Inditudi

11. Close the Services dialog box.

Enabling Juris Suite to Write to the Windows Event Log

If the Juris Suite Server is installed on Windows 7 or Windows Server 2008 and UAC is enabled, you must run a utility to enable Juris Suite to write to the Windows event log.

1. On the Juris Suite Client installation drive, navigate to the following folder:

\inetpub\wwwroot\JurisSuiteUpdater\JurisSuite\

2. Double-click the **CreateJSEventLogSource.exe** file.

The script executes quickly in the background. You may see a Command Prompt dialog box appear briefly.

Configuring and Using the JurisWebAPI

To fully configure the JurisWebAPI, you need to enable the PUT and DELETE verbs and update the help file addendum.

Enabling PUT and DELETE

By default, the PUT and DELETE verbs are not enabled for IIS7 and later.

Follow these steps to enable PUT and DELETE manually:

- 1. Open the applicationhost.config file as an administrator.
 - a. Perform one of the following actions, based on your operating system:
 - Windows 7 / Server 2008: Click the Windows Start menu, type notepad in the Search text box.
 - Windows 8 / Server 2012: Search for notepad.
 - b. In the list of search results, right-click **Notepad**, and click **Run as administrator**. (You might be prompted to confirm the action or to enter an administrator password.)

The Notepad interface appears.

- c. On the File menu, click Open.
- d. In the File name box, type:

%windir%\system32\inetsrv\config\applicationhost.config

e. Click **Open**. The configuration file opens in Notepad.

📕 applicationHost.config - Notepad	
File Edit Format View Help	
xml version="1.0" encoding="UTF-8"? </td <td>-</td>	-
IIS configuration sections.	
For schema documentation, see %windir%\system32\inetsrv\config\schema\IIS_schema.xml.	
Please make a backup of this file before making any changes to it.	
>	
<configuration></configuration>	
</td <td></td>	
The <configsections> section controls the registration of sections. Section is the basic unit of deployment, locking, searching and containment for configuration settings.</configsections>	
Every section belongs to one section group. A section group is a container of logically-related sections.	
Sections cannot be nested. Section groups may be nested.	
<pre><section [allowed="" [allow deny]="" [default="" [level="" [machineonly machinetoapplication apphostonly everywhere]="" [required,="" [true false]="" [xml="" allowdefinition="Everywhere" allowlocation="true" collection="" delegation="" in="" key]="" location="" mode]="" name="" of="" overridemodedefault="Allow" section]="" tags]="" the="" v=""></section></pre>	where it c.
The recommended way to unlock sections is by using a location tag: <location overridemode="Allow" path="Default web Site"> <system.webserver> <asp></asp> </system.webserver> </location>	
>	
<pre><configsections></configsections></pre>	-
	•

2. Using the Edit/Find option, locate the line that starts with the following:

<add name="ExtensionlessUrl-Integrated-4.0"

3. Enable the PUT and DELETE verbs by changing the line from:

```
<add name="ExtensionlessUrl-Integrated-4.0" path="*."
verb="GET,HEAD,POST,DEBUG"
type="System.Web.Handlers.TransferRequestHandler"
preCondition="integratedMode,runtimeVersionv4.0" />
```

To the following (where PUT and DELETE are added to the list of verbs):

```
<add name="ExtensionlessUrl-Integrated-4.0" path="*."
verb="GET,HEAD,POST,DEBUG,PUT,DELETE"
type="System.Web.Handlers.TransferRequestHandler"
preCondition="integratedMode,runtimeVersionv4.0" />
```

4. Verify that WEBDAV does not interfere with your requests by commenting out three individual entries in the file (using the !-- and -- comment syntax).

```
a. Change this line:
        <add name="WebDAVModule" image="%IIS_BIN%\webdav.dll" />
        to this:
        <!--add name="WebDAVModule" image="%IIS_BIN%\webdav.dll" /-->
```

b. Change this line:

```
<add name="WebDAVModule" />
to this:
<!--add name="WebDAVModule" /-->
```

```
c. Change this line:
```

```
<add name="WebDAV" path="*"
verb="PROPFIND, PROPPATCH, MKCOL, PUT, COPY, DELETE, MOVE, LOCK, UNLOCK"
modules="WebDAVModule" resourceType="Unspecified" requireAccess="None" />
to this:
<!--add name="WebDAV" path="*"
verb="PROPFIND, PROPPATCH, MKCOL, PUT, COPY, DELETE, MOVE, LOCK, UNLOCK"
modules="WebDAVModule" resourceType="Unspecified" requireAccess="None" /-->
```

5. Save the file and close Notepad.

Updating the JurisWebAPI Help File

Some settings in the web.config file require additional configuration. This file is located in the following directory:

<add key = "SendNotificationEmails" value = "false" />

This must be set to TRUE so when clients and matters are edited or entered, an email will be sent.

<add key = "SMTPAddress" value = "" />

The value must be entered by your firm on your SMTPAddress.

<add key = "FromEmailAddress" value = "" />

The FROM email address when the email is sent regards to client and matters.

<add key = "ExpandNarrativeText " value = "true" />

When this is true, if there are text codes in the narrative, it will expand once POST command is run for time and expense entries. If false, the narrative will not expand.

Installing the Juris Suite Client

The installation of the Juris Suite client involves the following steps:

- Uninstall any existing client installation (previous version of the Juris Suite client)
- Install the Juris Suite client software
- Configure the Juris Suite client
- Configure your firm settings
- Synchronize schemas
- Enable writing to the log file
- Review the optional configurations

Uninstalling the Existing Juris Suite Client

If you have an earlier version of the **Juris Suite Client** installed, you must uninstall it before installing the current version. To uninstall the server, complete the following:

- 1. Open the Windows Control Panel.
- 2. Click Add or Remove Programs. The Add or Remove Programs window opens.
- 3. Click Juris Suite Client in the list of installed programs to highlight it.
- 4. Click the **Remove** button.
- 5. Click Yes to confirm the removal of the software from your computer.

The software is uninstalled.

6. Once the item is removed, close the Add or Remove Programs window.

Installing the Client Software

Once you have uninstalled any previous versions of the Juris Suite client on your computer, you can start the installation wizard, which will guide you through the Juris Client installation process.

1. Double-click the JurisSuiteClient.exe file.

Name
 ☑ AppStart ☑ Juris Suite Client ☑ JurisSuiteClient

The Welcome screen appears.

📳 Juris Suite Client Installation		×
Welcome to the InstallShield	Wizard for Juris Suite Client	箯 LexisNexis [.]
The InstallShield(R) Wizard will insta	all Juris Suite Client on your compute	er. To continue, dick Next.
WARNING: This program is protecte	d by copyright law and internationa	l treaties.
InstallShield	< Back. Nex	ct > Cancel

2. Click Next.

The License Agreement screen appears.

Juris Suite Client Installation		
License Agreement Please read the following license ag	greement carefully.	箯 LexisNexis [.]
IMPORTANT: FOR SUBSCRIBERS OF THIS COMPONENT SHALL BE GOVE AGREEMENT. FOR ALL OTHERS, TH LexisNexis, a division of Reed Else Software Agreement ("Agreement	F JURIS® FROM LEXISNEXI RNED UNDER THE TERMS (IE FOLLOWING SHALL API evier Inc., ("Company") (S, DOWNLOADING OF OF THE SUBSCRIPTION PLY.
individual or a single entity) and C Agreement, which includes asso ("Product").	nt") is a legal agreement Company for the softward ciated media and interne	between you (either an e that accompanies this t-based services, if any
Agreement, which includes asso ("Product"). Capitalized terms are defined in t	nt") is a legal agreement Company for the softward ciated media and interne the last section of this Ag	between you (either an e that accompanies this t-based services, if any preement.
Agreement, which includes asso ("Product"). Capitalized terms are defined in t	nt") is a legal agreement Company for the softward ciated media and interne the last section of this Ag reement	between you (either an e that accompanies this t-based services, if any preement.
 Software Agreement ("Agreement and the structure of the struc	nt") is a legal agreement Company for the softward ciated media and interne the last section of this Ag reement ense agreement	between you (either an e that accompanies this t-based services, if any preement.
Agreement, which includes asso ("Product"). Capitalized terms are defined in t I accept the terms in the license ag I do not accept the terms in the license in the lice	nt") is a legal agreement Company for the softward ciated media and interne the last section of this Ag reement ense agreement	between you (either an e that accompanies this t-based services, if any preement.

3. Click I accept the terms in the license agreement, and click Next.

The Customer Information screen appears.

Customer Information		/ LovicNovic
Please enter your inform	nation.	
User Name:		
Windows User		
Organization:		
Install this application fo	vr:	
Install this application fo	r: who uses this computer (all users)	
Install this application fo	r: who uses this computer (all users) me (Windows User)	
Install this application fo Anyone Only for	r: who uses this computer (all users) me (Windows User)	
Install this application fo Anyone Only for tallShield	or: who uses this computer (all users) me (Windows User)	

4. Enter the appropriate Customer Information, and click Next.

The Setup Type screen appears.

🙀 Juris Suite C	lient Installation	×
Setup Type Choose the s	etup type that best suits your needs.	🌔 LexisNexis
Please select	a setup type.	
• User	Juris Suite will be installed. (Deployment Manag from Administrator option.)	ger has to be installed
C Adminis	trator	
F	Deployment Manager will be installed. You also install Juris Suite.	have the option to
InstallShield	< Back	Next > Cancel

5. Verify that **User** is selected, and click **Next**.

The Ready to Install the Program screen appears.

🔂 Juris Suite Client Installation	×
Ready to Install the Program The wizard is ready to begin installation.	C LexisNexis
Click Install to begin the installation.	
If you want to review or change any of your installation settings, click Bac exit the wizard.	k. Click Cancel to
InstallShield	Cancel

6. Click Install

When the installation has finished, the Completed screen appears.



- 7. Click Finish.
- 8. Proceed to Configuring the Client below.

Configuring the Client

Before using the Juris Suite client for the first time, you need to configure some of its settings.

- 1. Start the Juris Suite client.
 - a. Windows 7 / Server 2008: Click Start, point to All Programs / Juris, and click Juris Suite.
 - b. Windows 8 / Server 2012: Search for Juris, and click Juris Suite from the search results.

The Juris Suite Login dialog box appears.

🌜 Juris Suit	te Login			×
R			E	A
			2.7	-
Company	MY LAW FIRM			
User ID				
Password				
Advance	i 🔻 🔇	Login	🝪 Car	ncel

2. Click the **Advanced** button.

The **Advanced** area appears at the bottom of the dialog box, showing additional options.

and the second second second second second second	×
	GA
Company MY LAW FIRM	2.7
User ID	
Password	
Advanced A	Login 😵 Cancel
Advanced	
Connection Type: Auto Con Cache Enabled: Yes	nnect Interval: 5
Web Update URL:	
http://	Test
Web Connect URL:	
http://	Test
Application Data Path:	
Reset to Default Settings	Lock Settings
Reset to Default Settings Check for Updates	Lock Settings 🔲 Rebuild Snap In File

3. Verify that the **Lock Setting** check box, near the bottom of the Advanced options area, is *not* selected (checked), as shown below.

Connection Type: Cache Enabled:	Auto Connect 🗸			
	Yes	•	Interval:	5 ‡
Web Update URL:				
http://				Test
Web Connect URL:	3:			
http://			and the second s	Test
Application Data Pa	th:			
Reset to Default	Settings]	Lock Set	tings [
Check for Upd	ates		Rebuild Snap	In File
Trun and Card	10		Rebuild Ca	che

- 4. In the **Web Update URL** text box, replace **ServerName** with the name of the computer hosting the Juris Suite server (for internal users) or the outside IP address (for Web Connect users).
- 5. Click **Test** to validate the site. A message appears, informing you that the URL path is valid.
- 6. Click **OK** to close the message.
- 7. Click Reset to Default Settings.

The message appears about obtaining a new copy of the configuration from the updater service.

8. Choose Yes.

This action automatically populates the settings that were set in Deployment Manager and restarts the program.

- 9. If Web Connect is required, you need to specify the connection type that will be used.
 - a. Click the Advanced button again to reopen the Advanced area.
 - b. Click the **Connection Type** drop-down list, and select the option that will be most used.

Advanced		
Connection Type:	Auto Connect	•
Carles Fachlade	Auto Connect	
Cacrie Eriableu.	Local Network	
Web Update URL:	Disconnected	
	Web Connect	
Web Connect URL:		
Internet in the survey of	Contraction in the local division of	Test

The default option is Auto Connect. The program is designed to choose the next lowest

connection type if the selected fails.

The following options are available:

- Auto Connect. Allows the application to choose the connection. Recommended for laptops that go between the office and home that do not have a VPN available.
- Local Network. Used if you are on a LAN. Does not require cache. Recommended for Citrix/Terminal Server Client installations and desktop/laptop computers in the office or working off VPN.
- **Disconnected**. Enables an offline mode for users without an internet connection. Requires that the cache be enabled (as described in the next step).
- Web Connect. Allows you to remotely use Juris Suite via an Internet connection. Requires that the cache be enabled (as described in the next step) and the Web Connect URL setting must be defined.
- c. Set **Cache Enabled** to the appropriate setting for the selected connection type. If set to **No**, the **Connection Type** is automatically set to **Local Network**.

Advanced			
Connection Type:	Auto Conne	ct	*
Cache Enabled:	Yes 🔹	Interval:	5 ‡

d. Make note of the **Interval** setting (in minutes). This value is only adjusted for slower networks.

Advanced			
Connection Type:	Auto Con	nect	•
Cache Enabled:	Yes	Interval:	5 🛟

- 10. Click the **Lock Settings** check box, near the bottom of the **Advanced** area, to prevent accidental changes to the above settings.
- 11. If cache is *enabled* for most of the company, it is strongly recommended to create a *prepopulated cache* to import initially to save time. This can be done using the **Import Cache** button to import a saved pre-populated cache file on a shared drive. For more information, see **Importing a Cache** below.
- 12. Close the Juris Suite Login dialog box.

Configuring Firm Settings

Firm settings must be configured prior to using Juris Suite for the first time.

Note: Some Juris Suite modules in this procedure might not be available to you, depending on your purchase. If a module does not appear in the list, skip the steps for configuring that module's settings and continue with the rest of the procedure.

1. Log in to the Juris Suite client as SMGR (with password smgr).

The main Juris Suite interface appears.

2. In the upper right corner of the interface, click the **Juris** button, point to **Admin**, and then click **Firm Settings**.

The Firm Settings dialog box appears.

3. In the list of modules on the left side of the dialog box, click **Distributions**.

The module's settings appear on the right side of the dialog box.

- 4. Configure the following settings:
 - **From Email Address**. Change the default domain to your firm's email domain. Users cannot reply to this email address, and it does not need to be set up in Exchange.
 - **Smtp Host Address**. Change to the internal IP address of your firm's email server. You can use the full computer name instead, but this may cause DNS issues.
 - **Webserver Url**. Change to the format *SERVERNAME*/JurisDistributedReports, where SERVERNAME is the name of the computer hosting the Juris Suite server.
- 5. In the list of modules on the left side of the dialog box, click Viewer.
- 6. Configure the **Dashboard Server Url** by changing **localhost** to the name of the computer hosting your Juris server.
- 7. In the list of modules on the left side of the dialog box, click Alerts.
- **8.** Configure the following settings:
 - From E-mail Address. Change the default domain to your firm's domain. Users cannot reply to this email address, and it does not need to be set up in Exchange.
 - **Smtp Host Address**. Change this to the internal IP address of your firm's email server. You can use the full computer name instead, but this may cause DNS issues.
- 9. In the list of modules on the left side of the dialog box, click Collections.

10. Configure the following settings:

- **Default Email From Address**. Change the default domain to your firm's domain. Users cannot reply to this email address, and it does not need to be set up in Exchange.
- **SMTP Host Address**. Change to the internal IP address of your firm's email server. You can use the full computer name instead, but this may cause DNS issues.
- 11. Click Close to exit the Firm Settings dialog box.

Using the Synchronize Schemas Feature

Synchronize Schemas is an important function that adds updated/changed information made to the Juris database table structure including metadata and UDFs (User Defined Fields). When you create a

schema, it uses the metadata to display the tables and the fields. If additional tables or fields have been added to the metadata, they will not be in the existing standard or custom schemas.

To make the fields available, you *must* run the **Synchronize Schemas** utility to add that information to the existing schemas. This utility can only be executed by an Administrator.

1. Log in to the Juris Suite client as SMGR (with password smgr).

The main Juris Suite interface appears.

2. In the upper right corner of the interface, click the **Juris** button, point to **Utilities**, and click **Sychronize Schemas**.

A message appears, explaining the conditions of the function and whether you want to continue.



3. Click Yes to continue.

The process starts and a status dialog box appears.

Synchronize Schema	as Progress	
Schema: Client Matt	er Schema with Billing Address	
	33%	
Updating table Bill Lay	out Client	
	77%	

Upon completion, the Synchronize Schema Summary dialog box appears.

Sycnhronize Schemas Summary		×
Updated 108 of 108 sc	hemas successfully.	
Details		
Туре	Information	<u> </u>
Schema: Accounting Periods Schema		<u>e</u>
Success	Schema synchronized successfully.	
🖃 Schema: Accounts Payable Schema		
Success	Schema synchronized successfully.	
🖃 Schema: Accounts Payable Voucher	Schema	
Success	Schema synchronized successfully.	
🖃 Schema: Activity Codes Schema		
Success	Schema synchronized successfully.	
🖃 Schema: Aged Accounts Receivable		
Success	Schema synchronized successfully.	
🖃 Schema: Aged Accounts Receivable	Working Timekeeper	
Succos	Schoma sunchronized successfully	•
🛹 Print Details		😵 Close

- 4. (optional) Click the **Print Details** button to print out the finished report.
- 5. Click Close.

Enabling Juris Suite to Write to the Windows Event Log

If the Juris Suite client is installed on Windows 7 or Windows Server 2008 and UAC is enabled, you must run a utility to enable Juris Suite to write to the Windows event log.

To run the utility, double-click the executable file **CreateJSEventLogSource.exe**. The file can be found in the following location:

\Program Files (x86)\JurisSuite\GeneralRelease

Performing Optional Juris Suite Client Configurations

The following procedures are optional for the Juris Suite client. You should review each procedure to determine if it applies to your installation

Creating a Pre-populated Cache

Firms with large databases or multiple users with cache enabled can save time on the back end by creating a pre-populated cache. This allows you to create the cache from any client workstation and place it on a shared drive. Make sure the folder or drive location has permissions set so that each user performing the import can access the file. This file is for the initial setup of a cache or if they have to rebuild and it only needs to be created one time. It is recommended to perform exporting with everyone out of Juris and the database in Maintenance mode. This is to prevent changes to the Juris database from corrupting the pre-populated cache file while it's being exported. The export process can take anywhere from 10 minutes to 3-4 hours depending on database size.

Note: If cache is created on Windows 7 or Windows Server 2008, you must use the Run as administrator option.

1. On the Juris Suite Client installation drive, navigate to the following folder:

\Program Files\ JurisSuite\GeneralRelease

2. Locate and double-click the Juris.Utilities.PrepopulatedCacheCreator.exe executable file.

The Initial Cache Export Utility dialog box appears.

Initial Cache Export Utility	_ 🗆 ×
Choose the company	2
Path to cache export file	
C:\Users\Administrator\Documents\My Law Firm.CacheExport	
Advanced Export Cache	

- 3. Select the Company to Export. You must do this for each company if you have more than one.
- 4. Enter the path to save the cache file. Make sure that it is a location that can be accessed by those wanting to import. You can also use the **browse** (...) button to navigate to the location.
- 5. Click the Export Cache button.
- 6. Click Yes on the continuation dialog box.
- 7. When the export has completed, click OK.
- 8. Refer to the Juris online help for instructions on creating the attachment add-on files (if needed).

Publishing the Juris Suite Dashboard Metrics

This process is a requirement for the **Juris Suite Business Intelligence** Snap In to display data in the dashboards. You can skip this section if the module was not purchased.

1. Log in to the Juris Suite client as SMGR (with password smgr).

The main Juris Suite interface appears.

2. Click the Business Intelligence snap in.

	My Reports
3	Budgeting
1	My Transactions
12	My Summary
Ì,	Inquiry
Ċ.	Business Intelligence
-	Collections

3. At the top of the Juris Suite interface, click the **Metrics** ribbon.



4. On the Metrics ribbon, click the **Publish** button.



A message appears about restarting the dashboard server.

- 5. Click Yes.
- 6. After the metrics have been published, click OK.

Importing a Cache

After a new install of Juris Suite client, you can import the cache before logging in.

- 1. Launch the Juris Suite application.
- 2. On the log in screen, click the **Advanced** button.

3. Near the bottom of the Advanced area, click the Import Cache button.

🍫 Juris Suite Login	x
	The second
2.7 Company MY LAW FIRM	205
User ID	
Password	
Advanced 🔺 🍼 Login 😵 Ca	ncel
Advanced	
Connection Type: Auto Connect	•
Cache Enabled: Yes 👻 Interval:	5 ‡
Web Update URL:	
http://	Test
Web Connect URL:	
http://	Test
Application Data Path:	
Reset to Default Settings Lock Setting	ngs 🔲
Check for Updates Rebuild Snap In	n File
Import Cache Rebuild Cac	he

- 4. Navigate to the saved cache file location.
- 5. Click Yes button to accept the import.
- 6. When the import is complete, log in to Juris Suite.

Preparing for First Use

Once you complete the Juris Suite server and client installations, it is recommended that you go through the Juris Suite Settings and Permissions document before allowing users to use Juris Suite. This document can be found in our Additional Product Documentation section of the Juris Support Center.