

# Juris Suite Installation Guide

Version 2.8

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## LexisNexis

1801 Varsity Drive

Centennial Campus

Raleigh, NC 27606

North America: 800.387.9785

Outside North America: 919.467.1221

Fax: 919.467.7181

<http://www.lexisnexis.com/law-firm-practice-management/juris>

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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
- 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>

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## 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.

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### 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

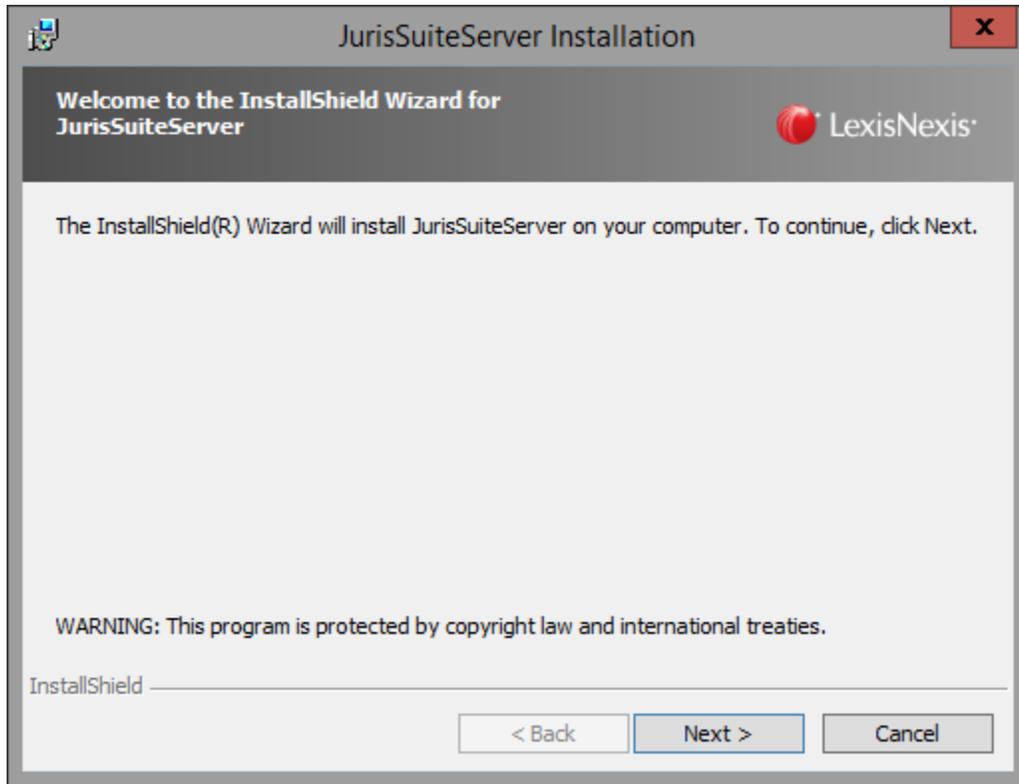
Once you have completed all of the pre-installation requirements, including downloading the Juris Suite installation file, you can start the installation wizard, which will guide you through the Juris Server installation process.

1. 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.

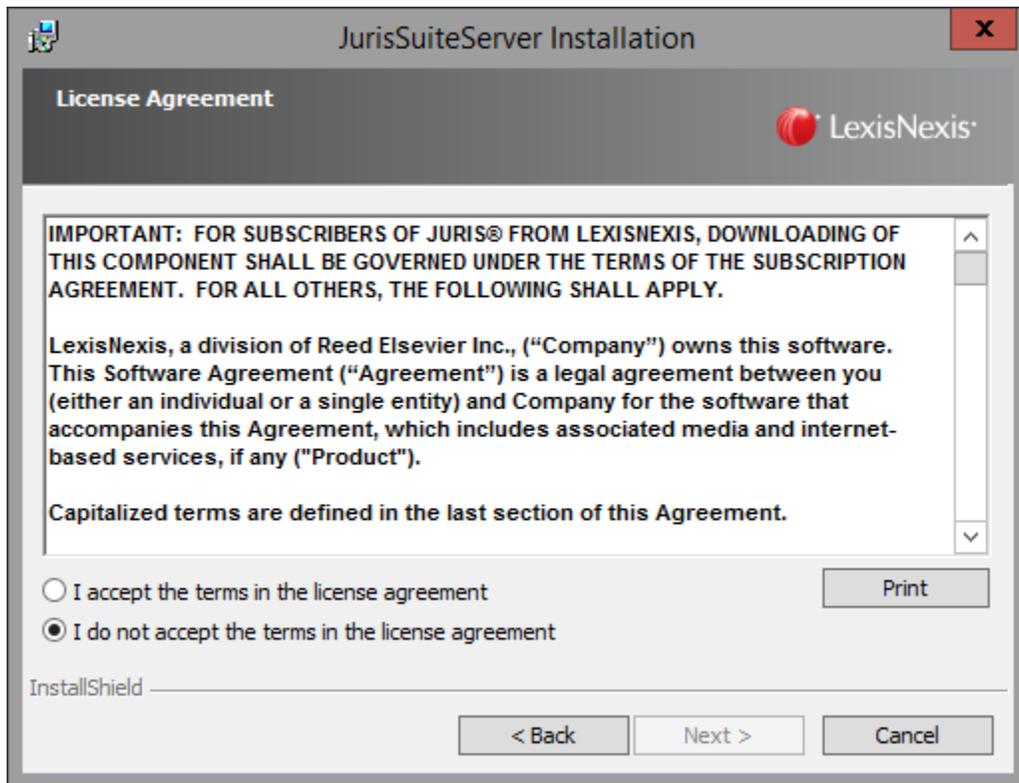
7. If prompted, click **Run** to verify the file's execution.

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



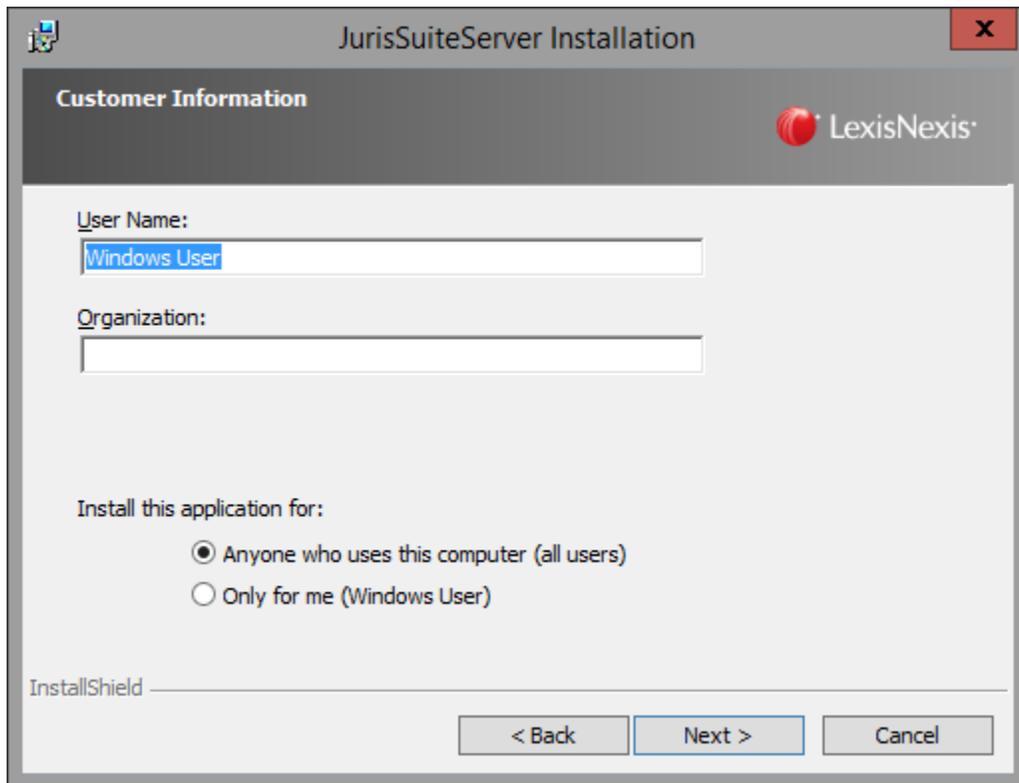
8. Click **Next**.

The License Agreement screen appears.



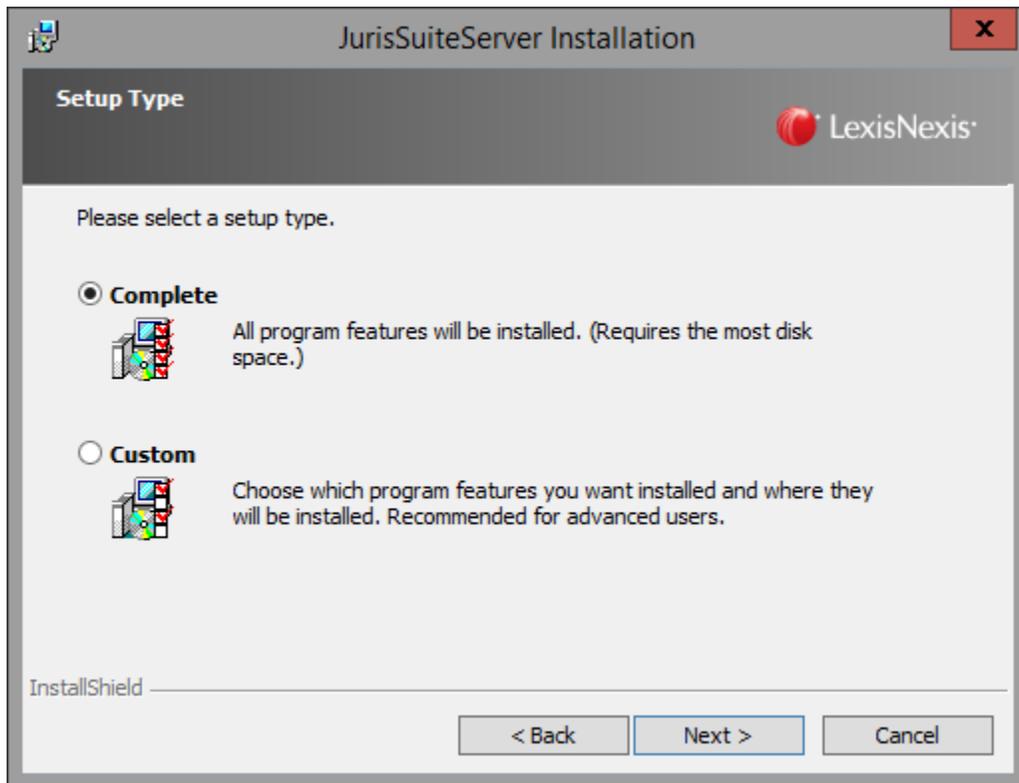
9. Click **I accept the terms in the license agreement** and click **Next**.

The Customer Information screen appears.

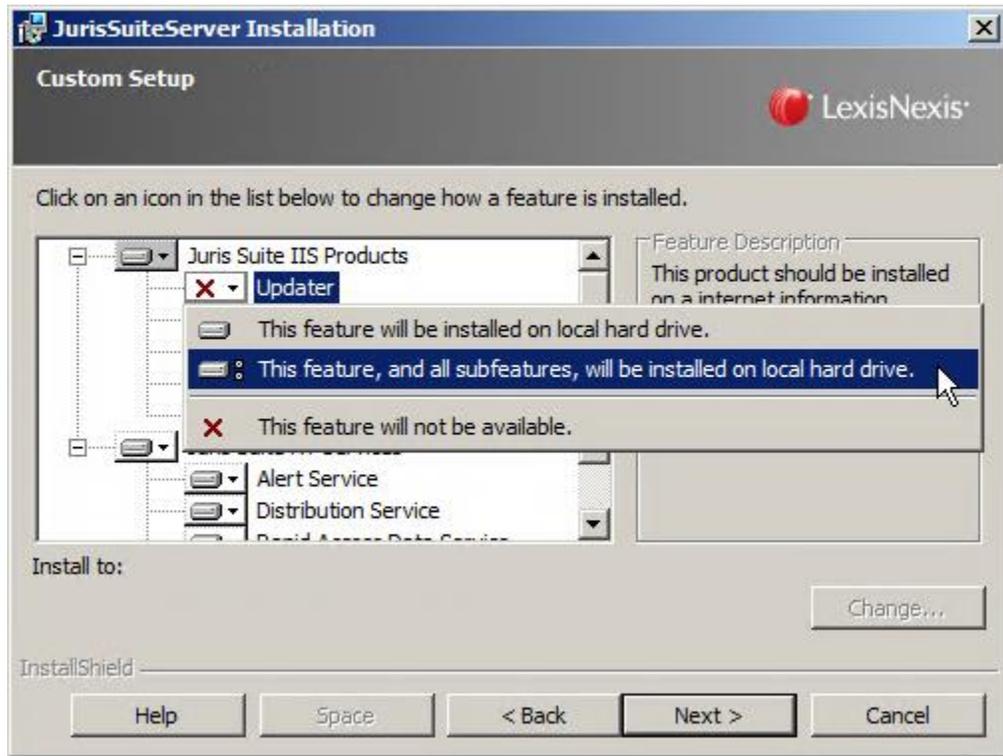


10. Specify the appropriate information, and click **Next**.

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.



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

The Change Current Destination Folder screen appears.

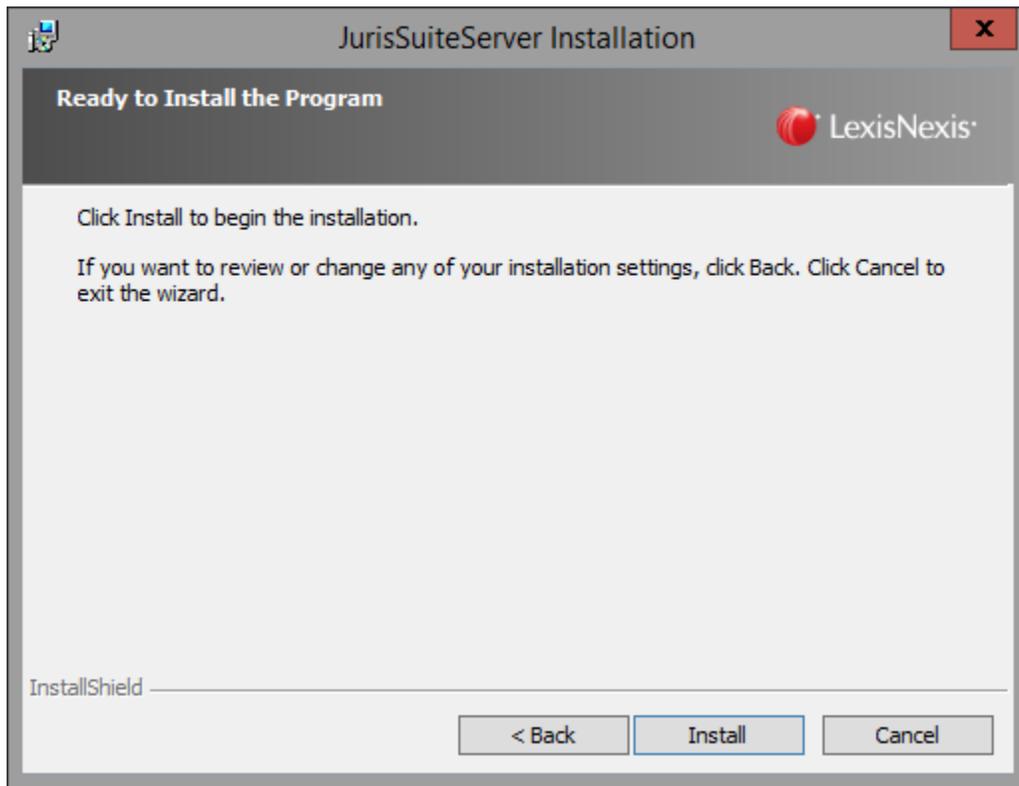
- d. Select the installation disk drive and location.
- e. Click **OK**.

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.



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.

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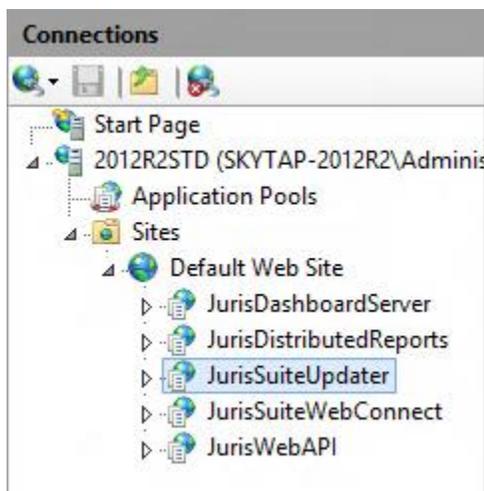
## Updating the Juris Suite Updater Website Settings

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.

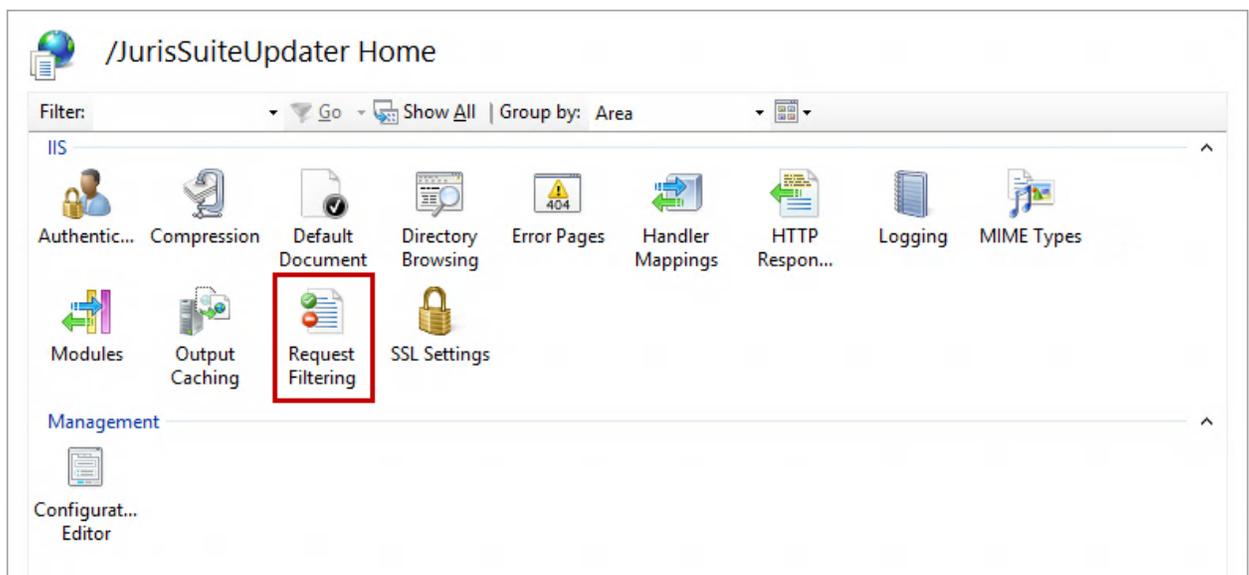
1. Access the Internet Information Services (IIS) Manager dialog box using one of the following options, based on your operating system.
  - **Windows Server 2008 / Window 7:** Click **Start**, point to **Administrative Tools**, and click **Internet Information Services (IIS) Manager**.
  - **Windows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



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

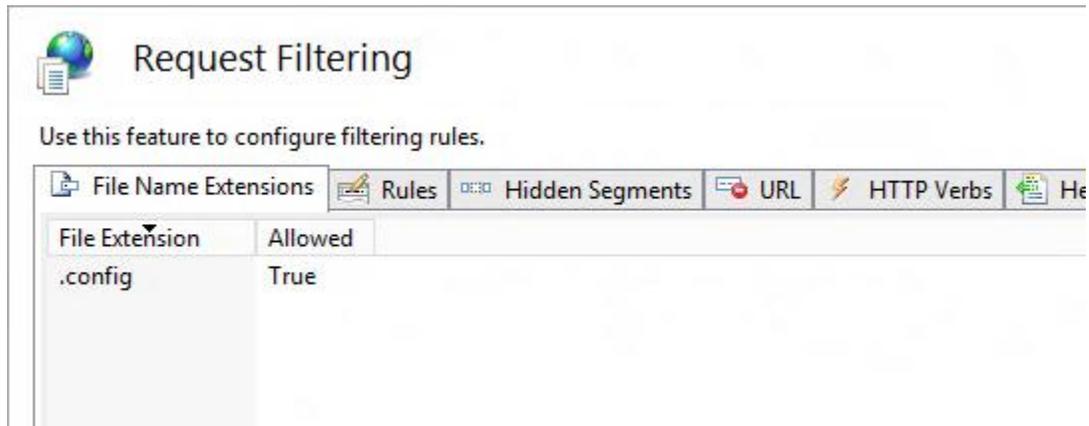


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**Note:** In some instances, Request Filtering may not appear as shown even if it is installed. For more information, refer to the following article that discusses how to edit the Request Filtering file list via the `ApplicationHost.config` file: 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

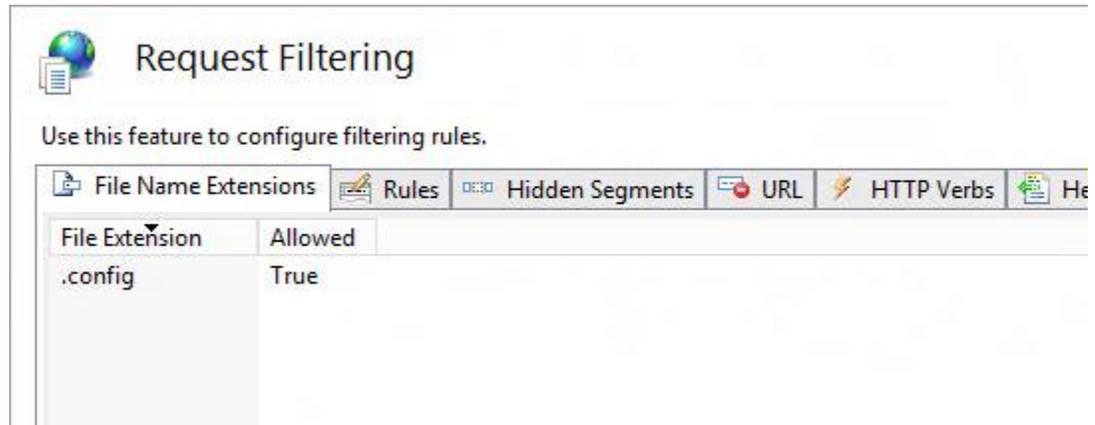
6. In the **File Extension** column, locate the **.config** entry.
7. If the entry is present, but set to **False**, you need to delete it and redefine it.
  - a. Right-click the existing **.config** entry.
  - b. From the menu that appears, click **Remove**.
  - c. Click **Yes**.
  - d. On the far right 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.



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.



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

### Installing the Juris Suite Deployment Manager

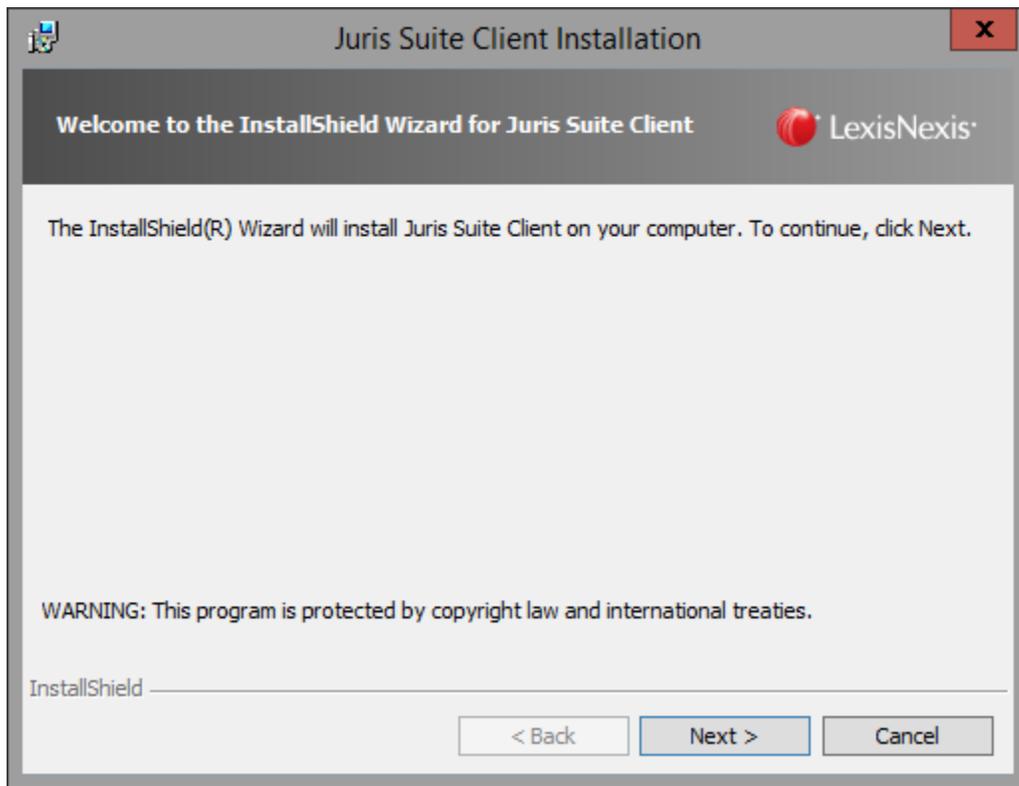
The Deployment Manager is used to upgrade the Juris database and provides access to updates for installed Juris Suite clients.

**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.

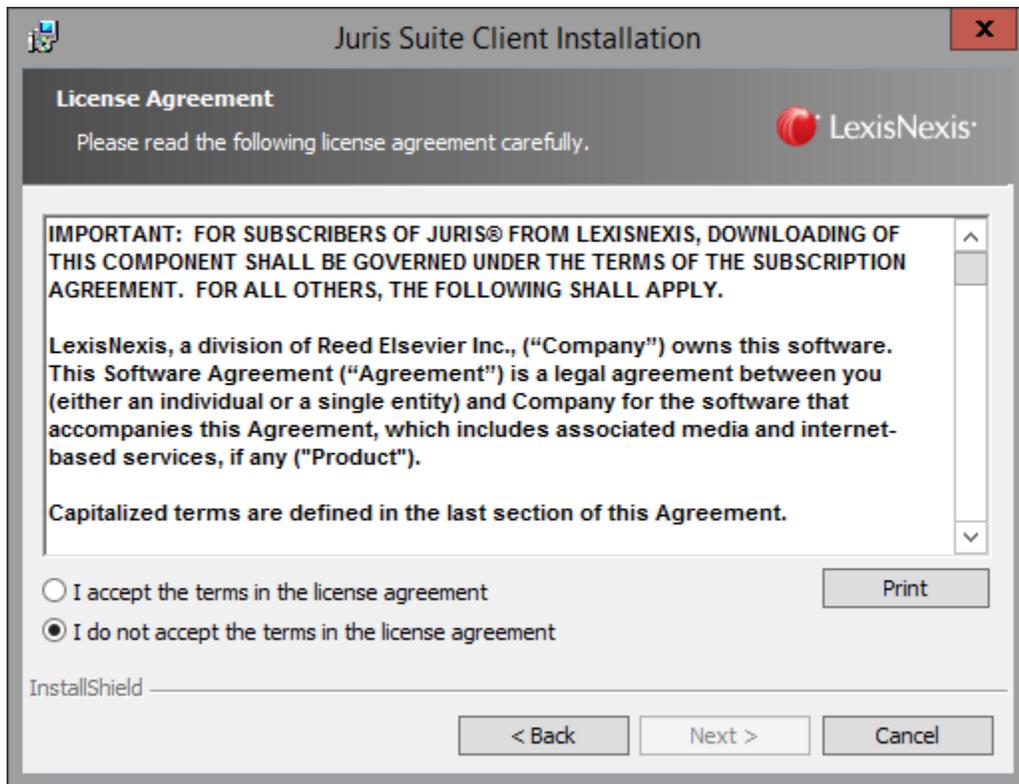
- 
4. Double-click the **JurisSuiteClient.exe** file.

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



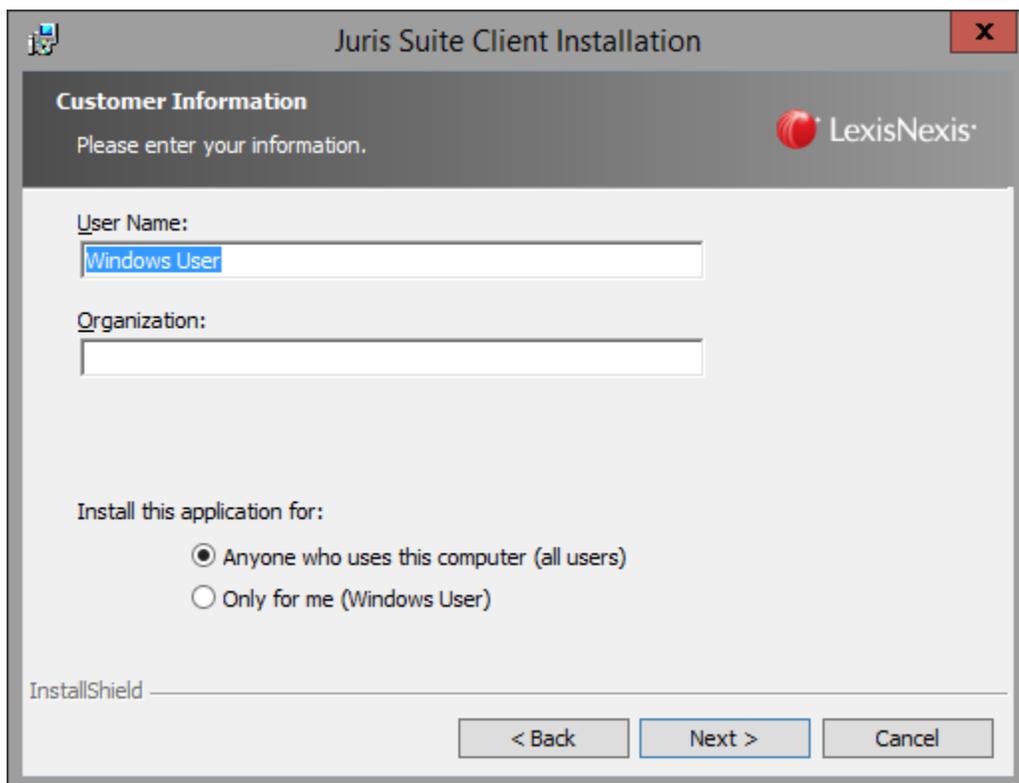
5. Click **Next**.

The License Agreement screen appears.



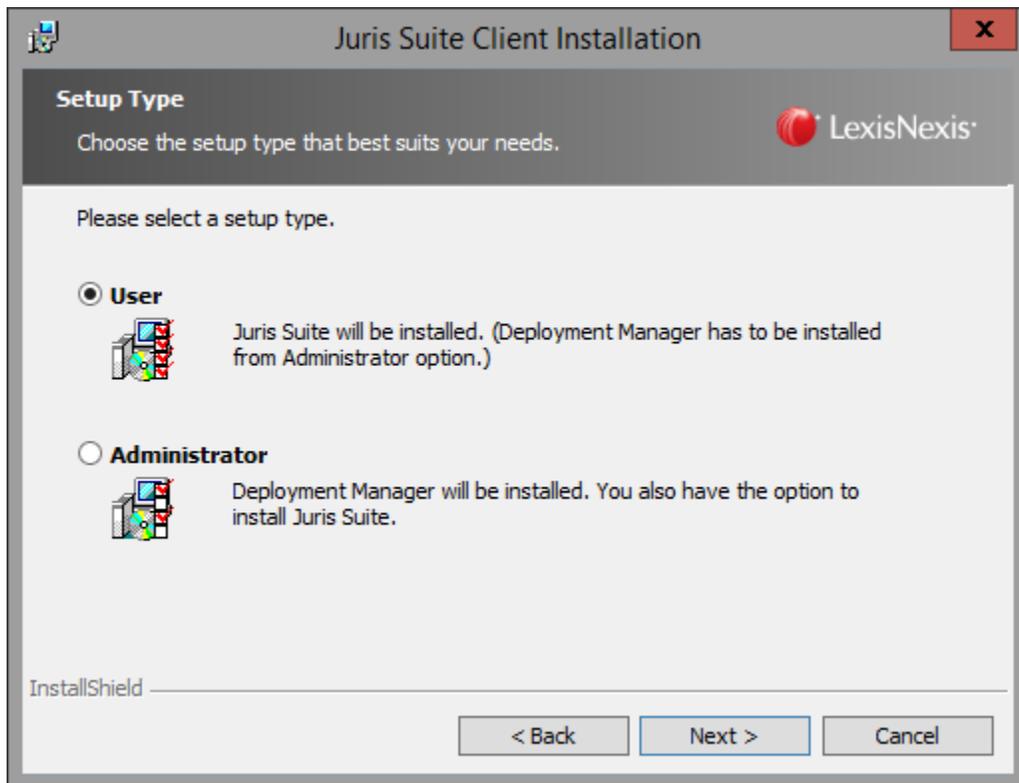
6. Click **I accept the terms in the license agreement**, and click **Next**.

The Customer Information screen appears.

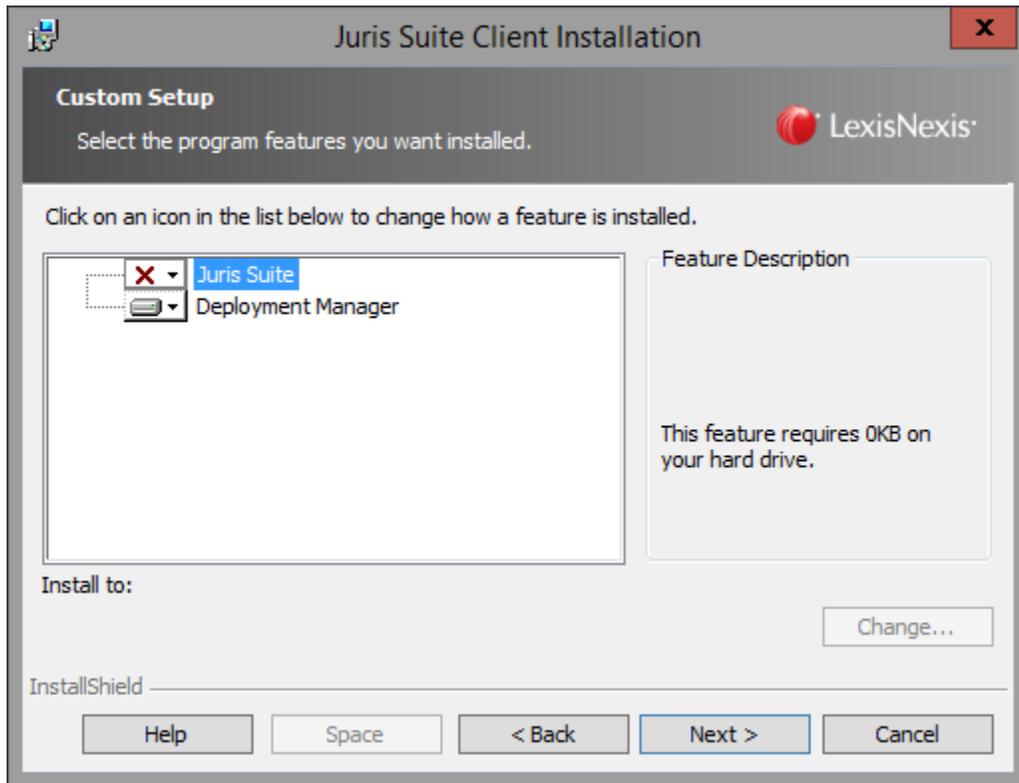


- 
7. Enter the appropriate information, and click **Next**.

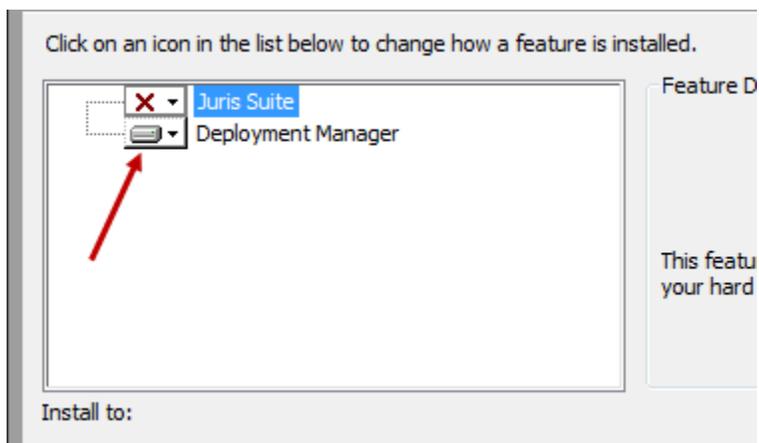
The Setup Type screen appears.



- Click **Administrator**, and click **Next**.



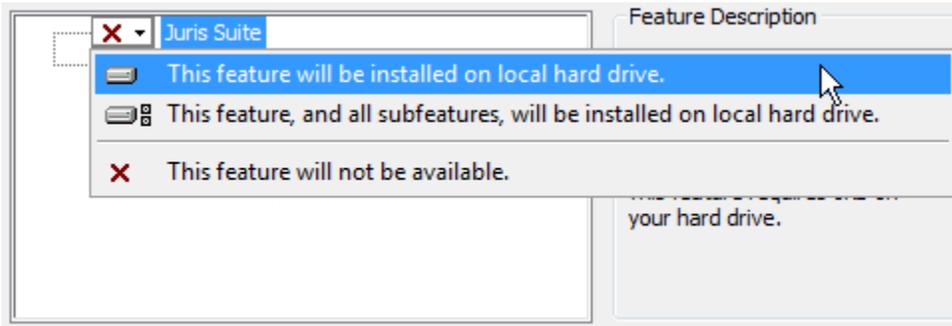
- Verify that the **Deployment Manager** entry is specified for installation, as highlighted below.



**Note:** You can also install the Juris Suite Client by activating the **Juris Suite** entry (click the entry

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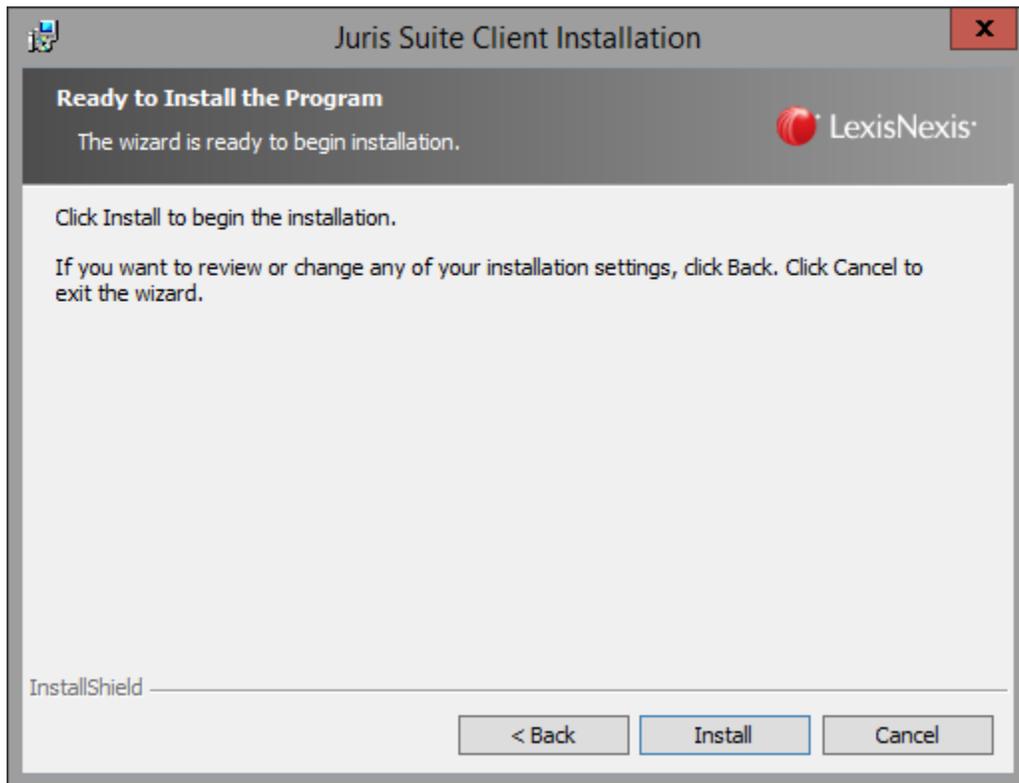
and select **This feature will be installed on local hard drive.**) For more information, see [Installing the Juris Suite Client](#).



10. Click **Next**.

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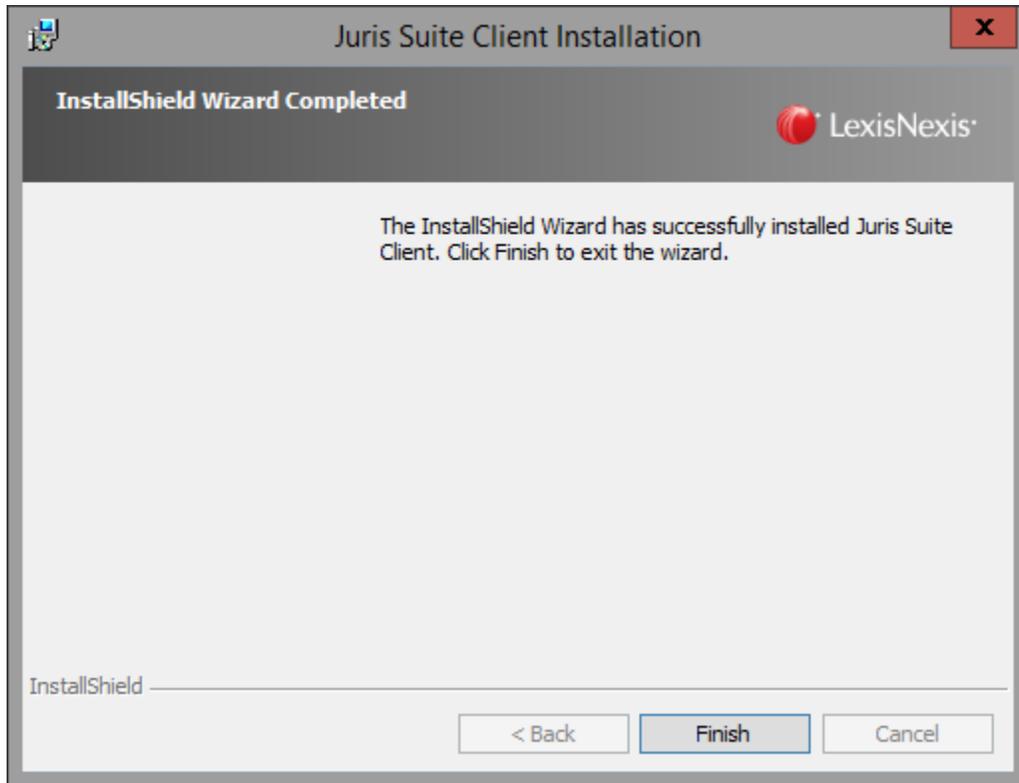
The Ready to Install the Program screen appears.



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11. Click **Install**.

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



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.

**Deployment Manager**

Deployment

Version currently available at Juris

Server URL:

Version:  as of

Last version downloaded

Staging Path:

Version:

Last version deployed

Company:   License:

Version:  SQL:  DB Size:

Web Update URL:

Web Connect URL:

Web Update Path:

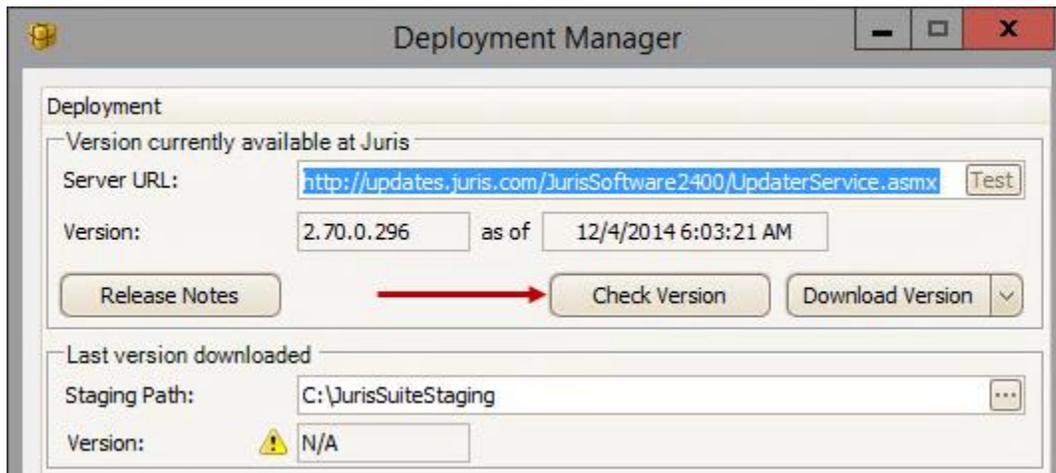
Juris Suite Configuration Settings

Data Path:

Cache Enabled:   Interval:

Lock Settings

2. Click the **Check Version** button.



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.

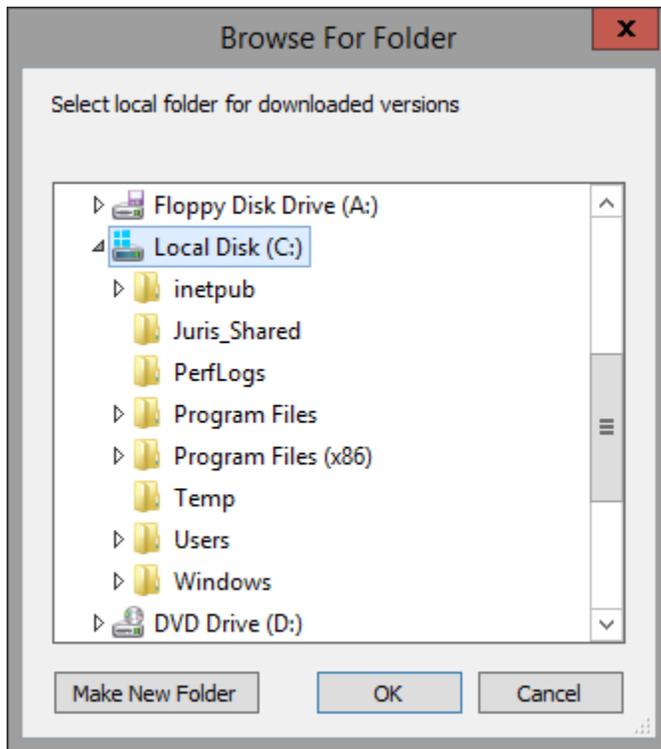
### **Specifying the Staging Path**

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

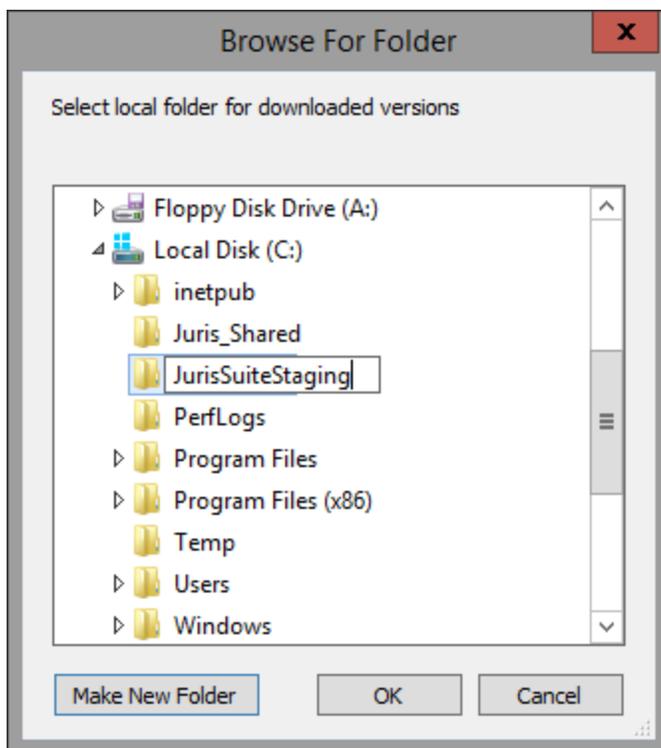
1. Click the **Browse** button (...) adjacent to the **Staging Path** text box.

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.

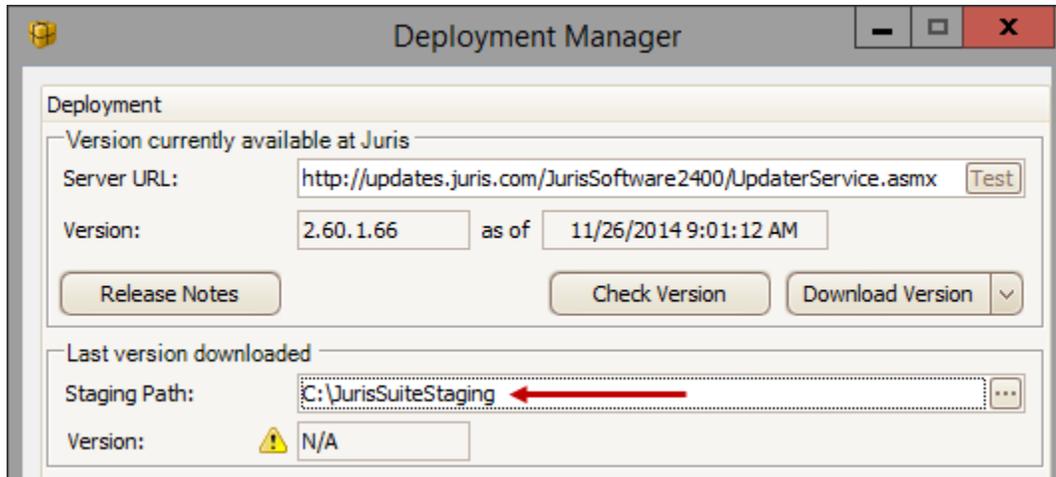


3. At the bottom of the dialog box, click the **Make New Folder** button, and name the new folder **JurisSuiteStaging**, as shown below.



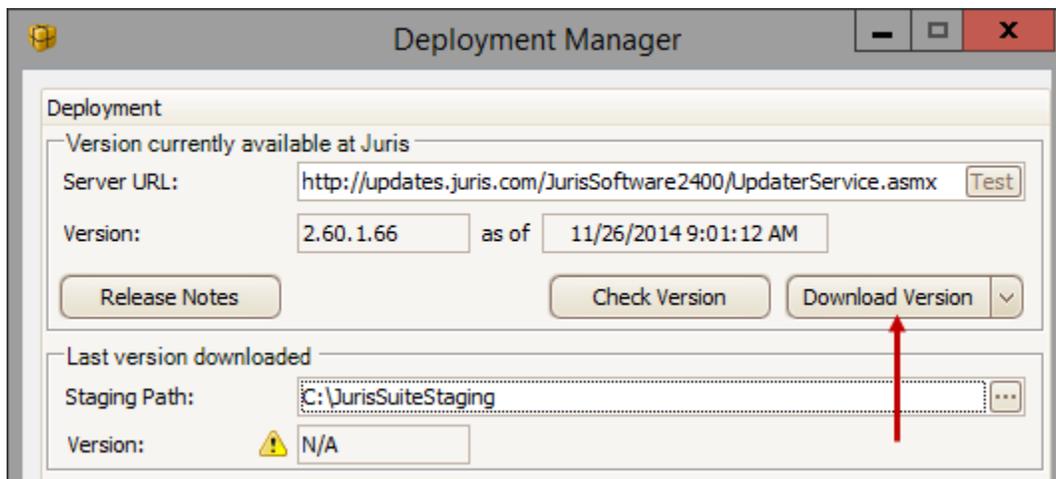
4. Click **OK**.

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

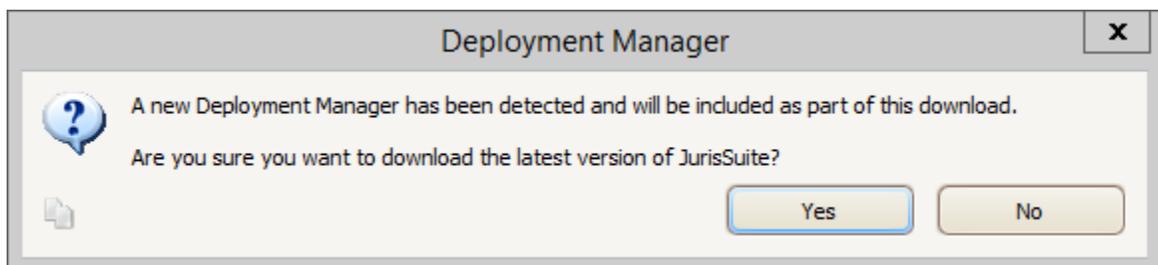


Now that the staging path is set, you can begin downloading updated files. The files will be stored in the specified folder.

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

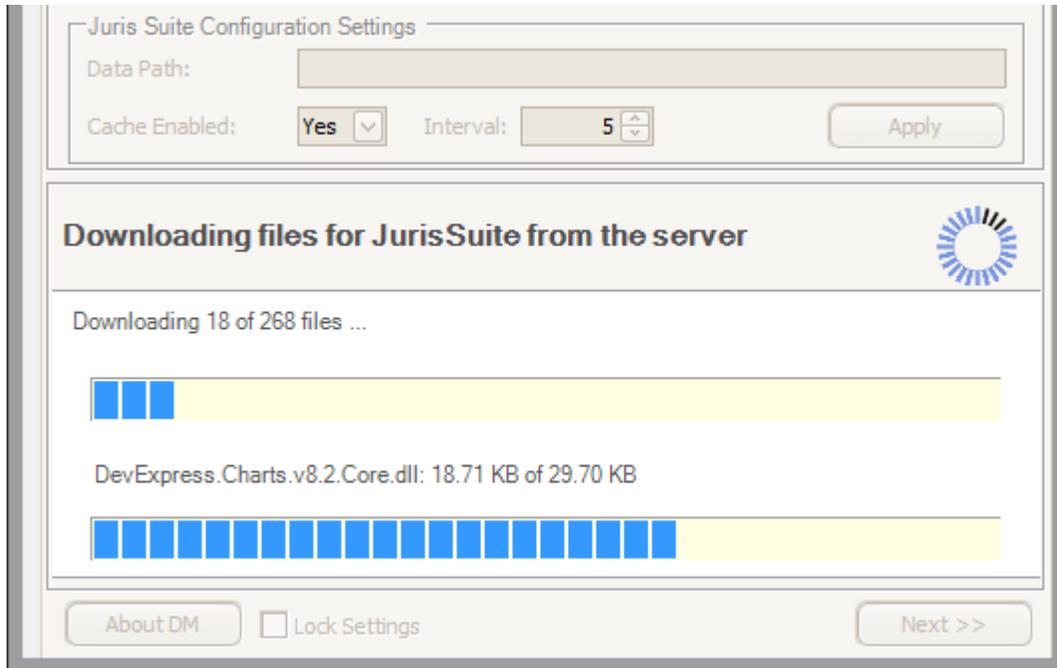


The Deployment Manager message appears, asking if you are sure you want to download the latest version of Juris Suite.



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.



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.

Description	Account	Type
100 MAIN	0103	Balance Sheet
100 *Conv Def Account	0103	Balance Sheet
100 Retained Earnings	1000	Balance Sheet
100 Petty Cash	1001	Balance Sheet
100 Office Furniture	1002	Balance Sheet
100 Depreciation	1003	Balance Sheet
100 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.

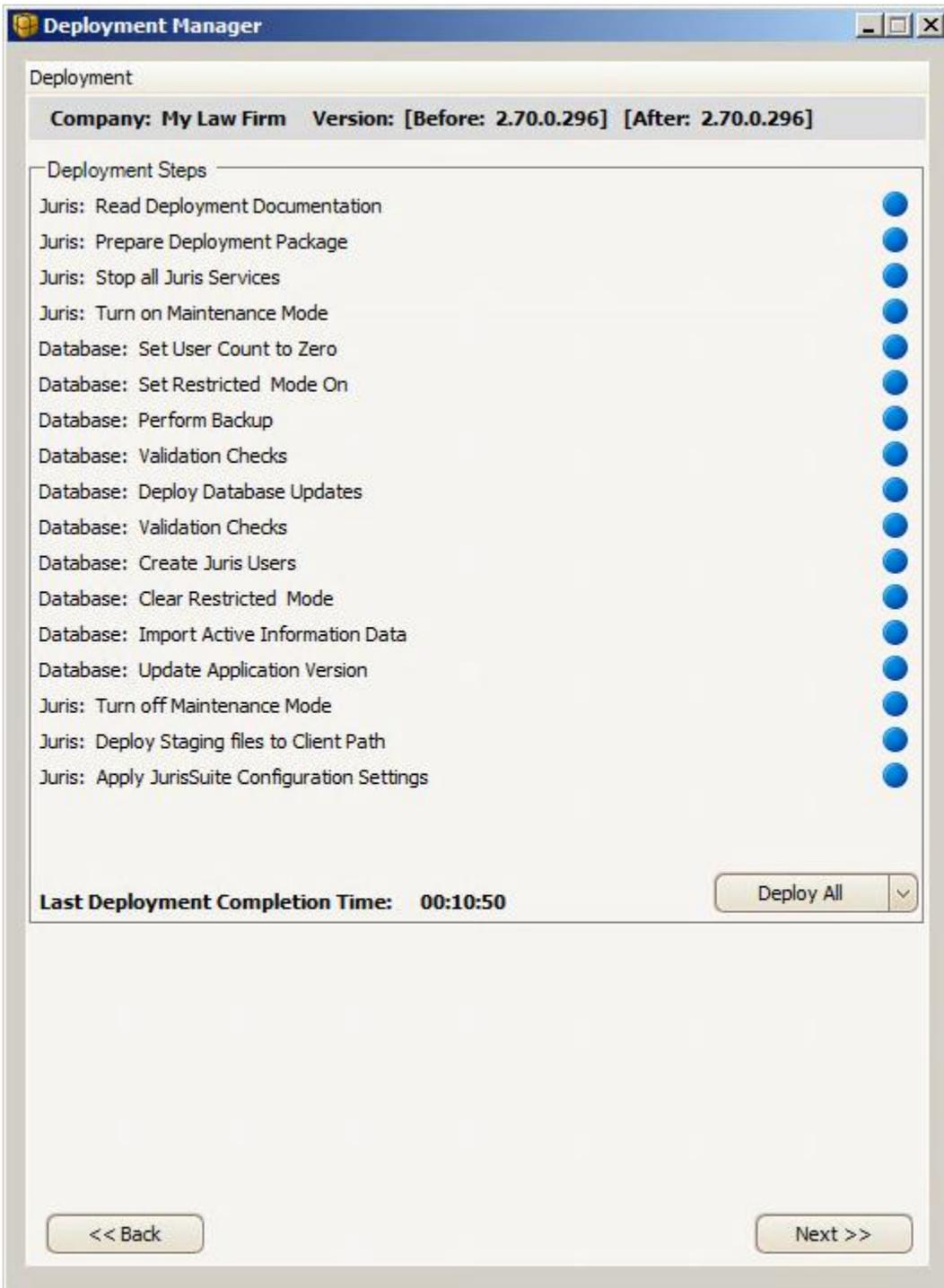
Description	Account	Type
100 MAIN	0103	Balance Sheet
100 *Conv Def Account	9998	Balance Sheet
100 Retained Earnings	1000	Balance Sheet
100 Petty Cash	1001	Balance Sheet
100 Office Furniture	1002	Balance Sheet
100 Depreciation	1003	Balance Sheet
100 Cash-Wachovia	1004	Balance Sheet

## 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.

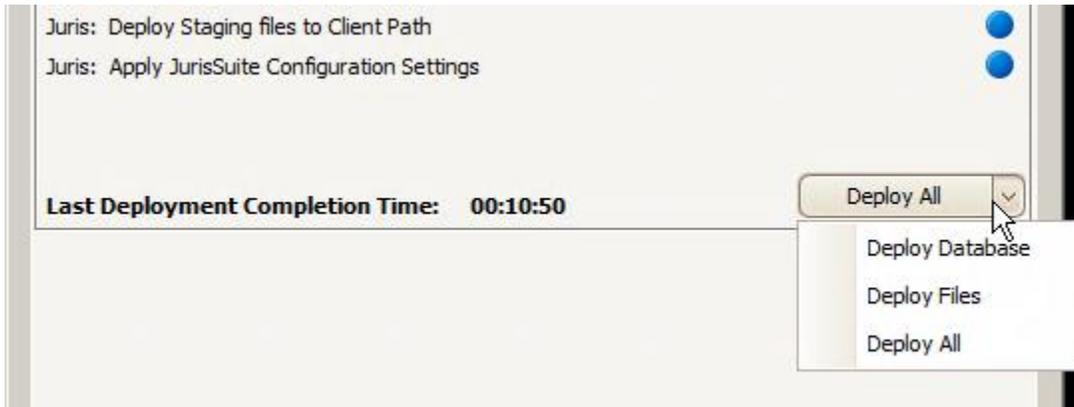
1. Verify that you have completed configuring the settings on the main Deployment Manager screen as described in [Deployment Manager Configuration](#).
2. (optional) Click the **Lock Settings** check box at the bottom of the Deployment Manager to prevent all displayed settings from being changed.
3. 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**.



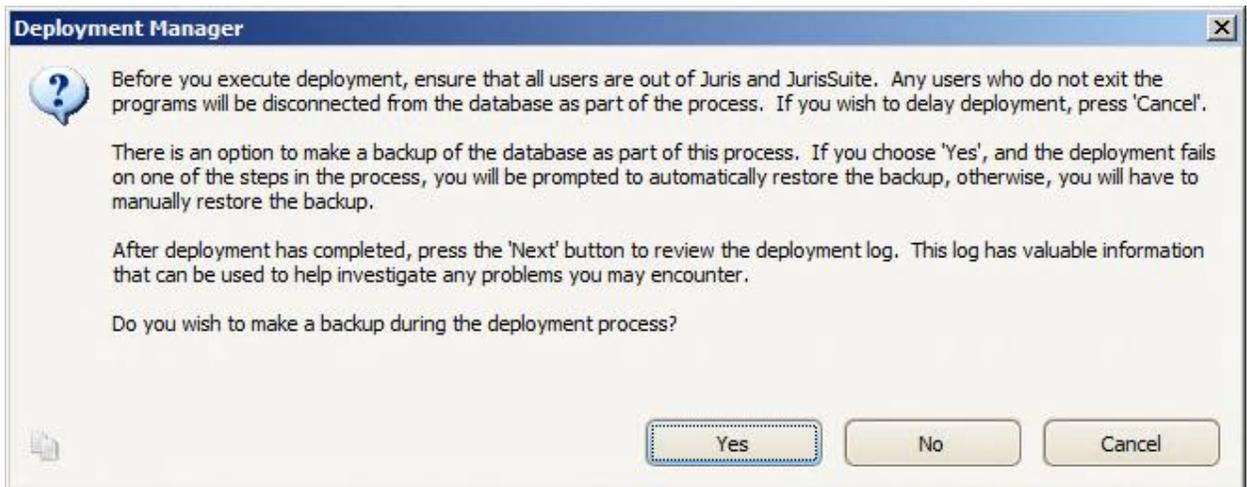
4. Click the arrow on the right portion of the **Deploy** button.

Several options appear.



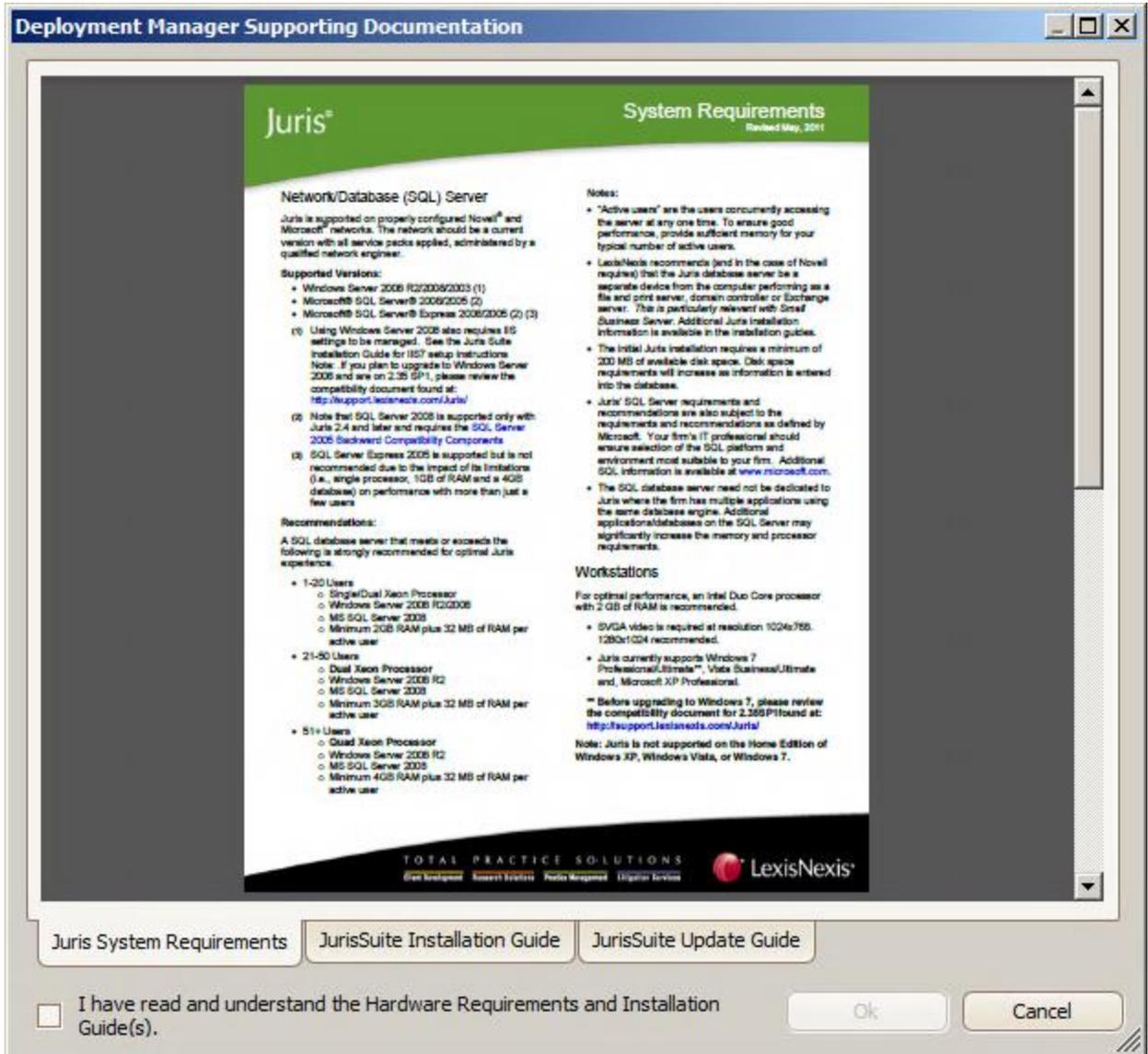
5. Select one of the following options:
  - (default) **Deploy All**. Ensures that all of the components are updated properly by deploying both database and application files.
  - **Deploy Database**. Allows you to simplify the process for clients that have multiple databases. Each database must be deployed 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.



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.



11. Click **OK**.

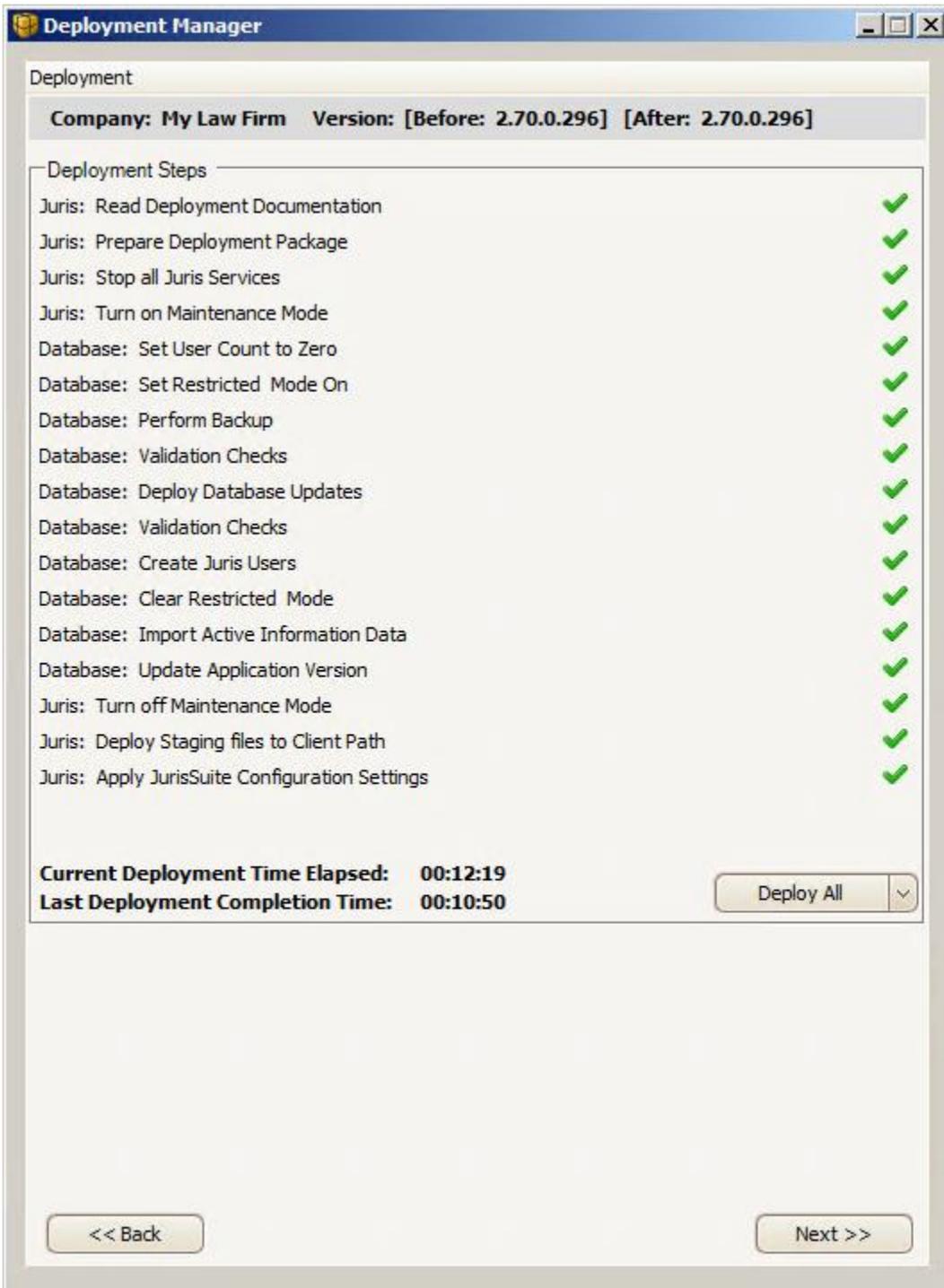
The deployment begins and the individual steps are marked with a check mark as they are completed.

12. When the deployment completes, a message appears stating that the 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](#).

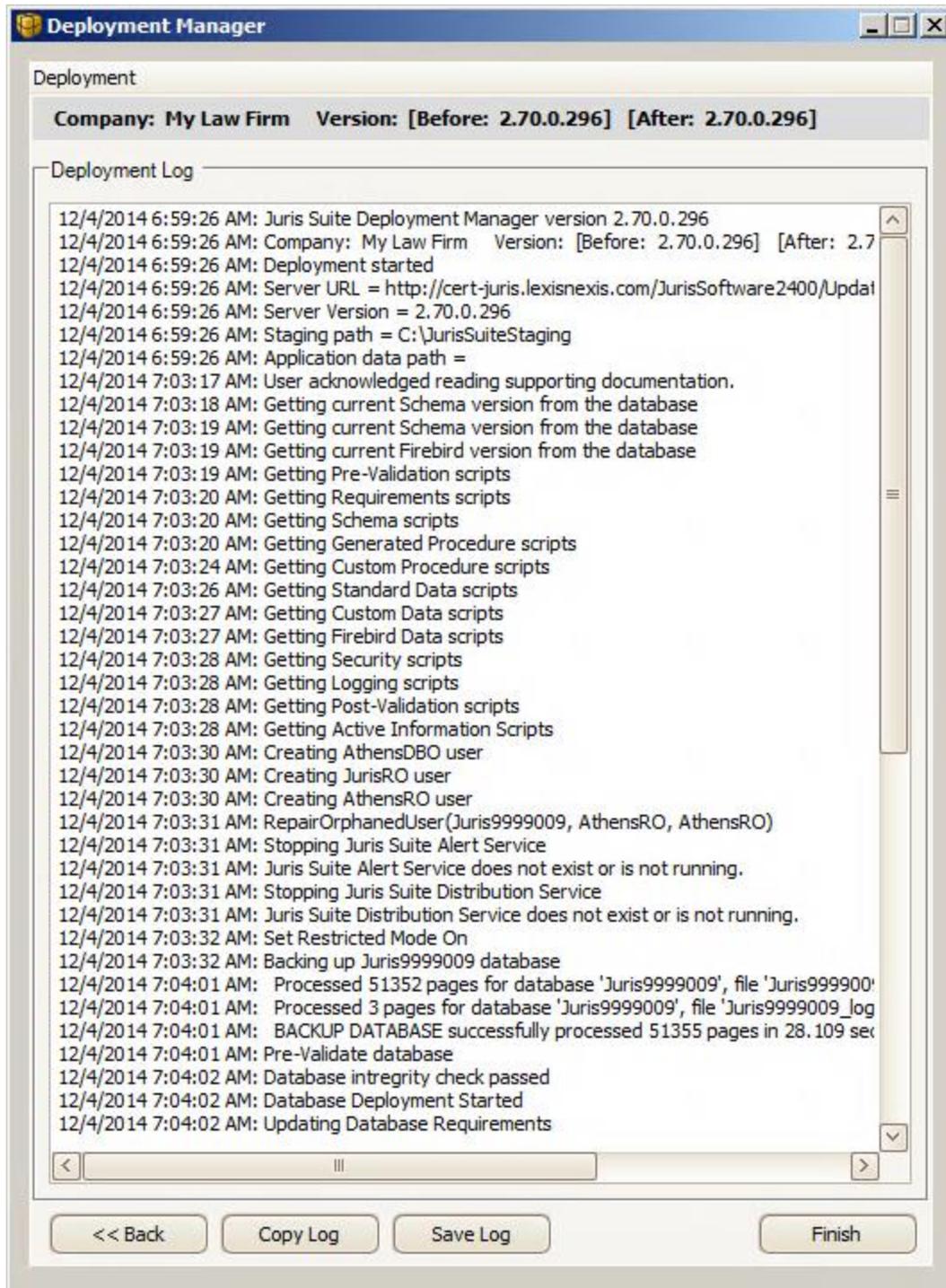
13. Click **Yes** to confirm that you want to delete the backup that was created during the deployment process.

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



14. Click **Next**.

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



- (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.

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

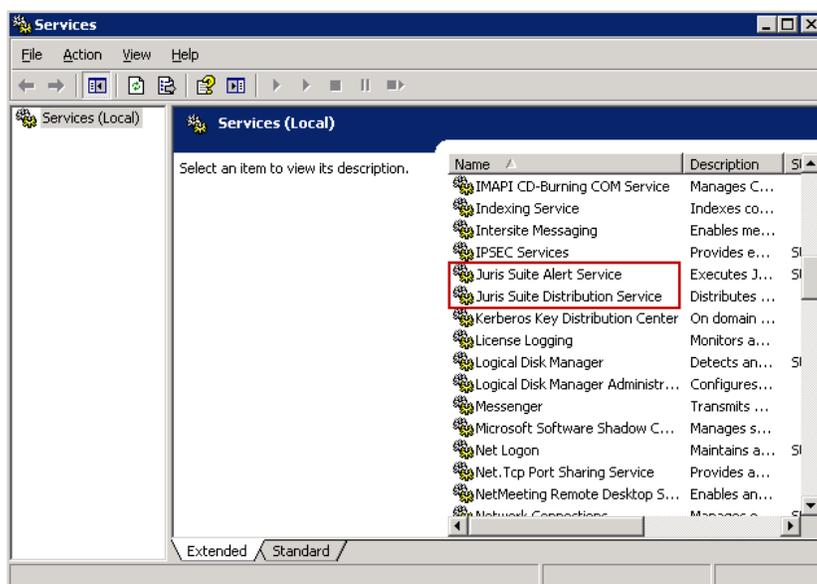
---

## 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.

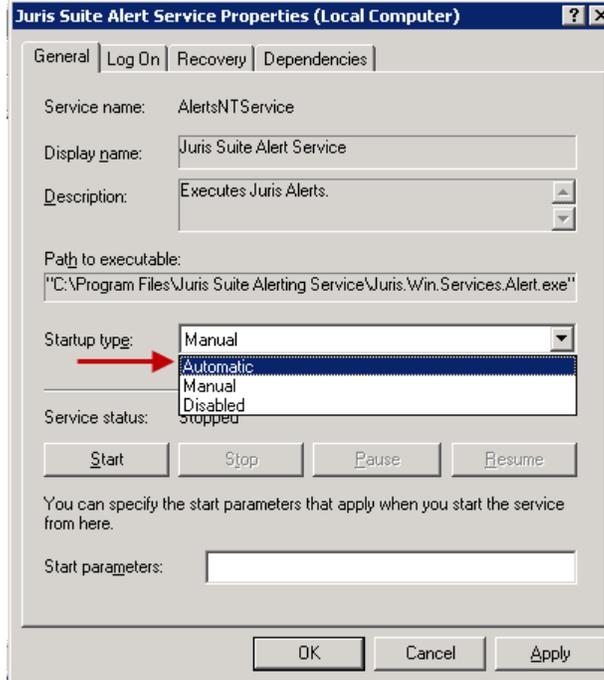


You need to configure each service individually.

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

The **Juris Suite Alert Service Properties** dialog box appears.

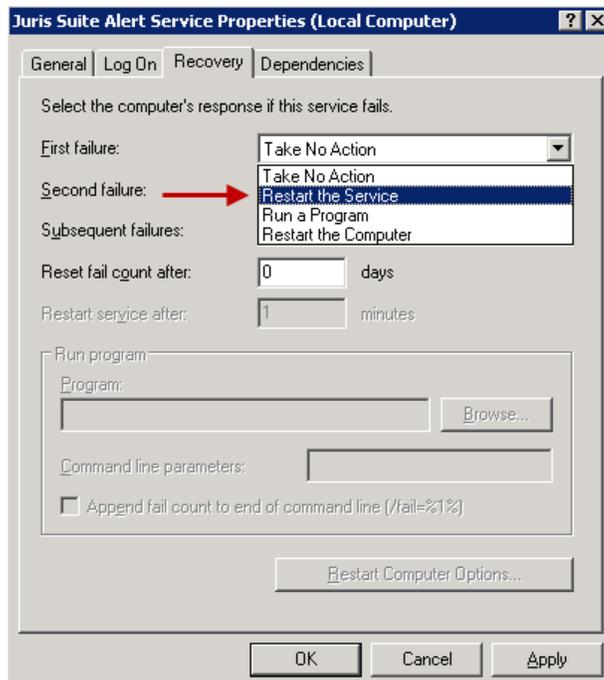
- From the **Startup type** drop-down list, select **Automatic**.



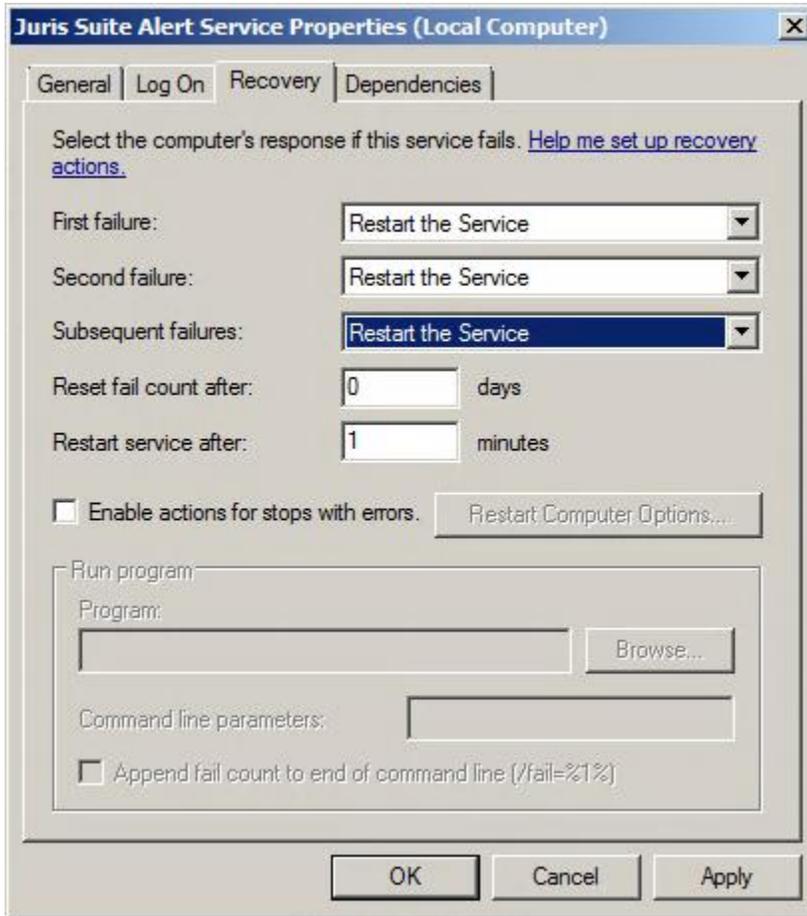
- Click the **Start** button.

The service is started.

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

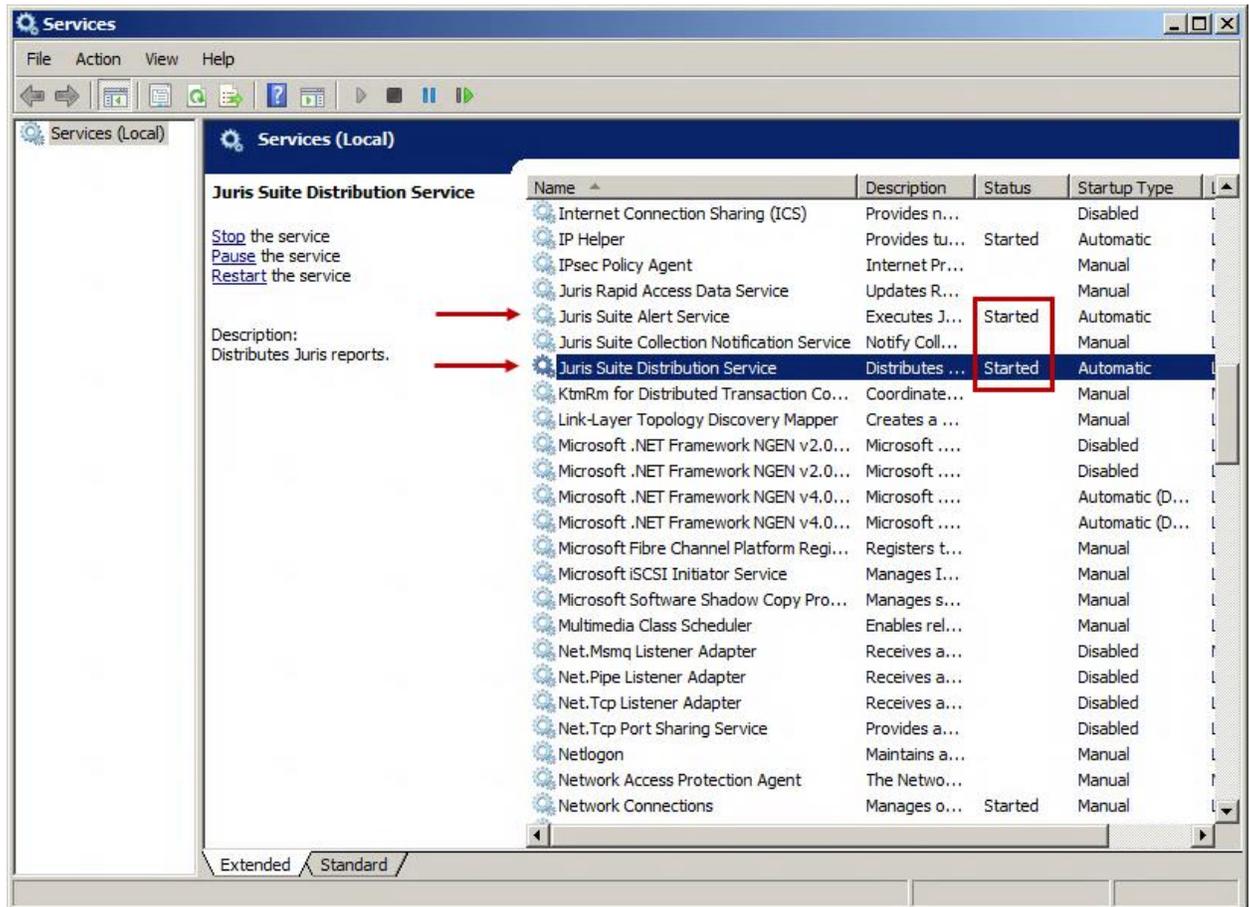


Your tab should appear as shown below.



8. Click **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.



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:

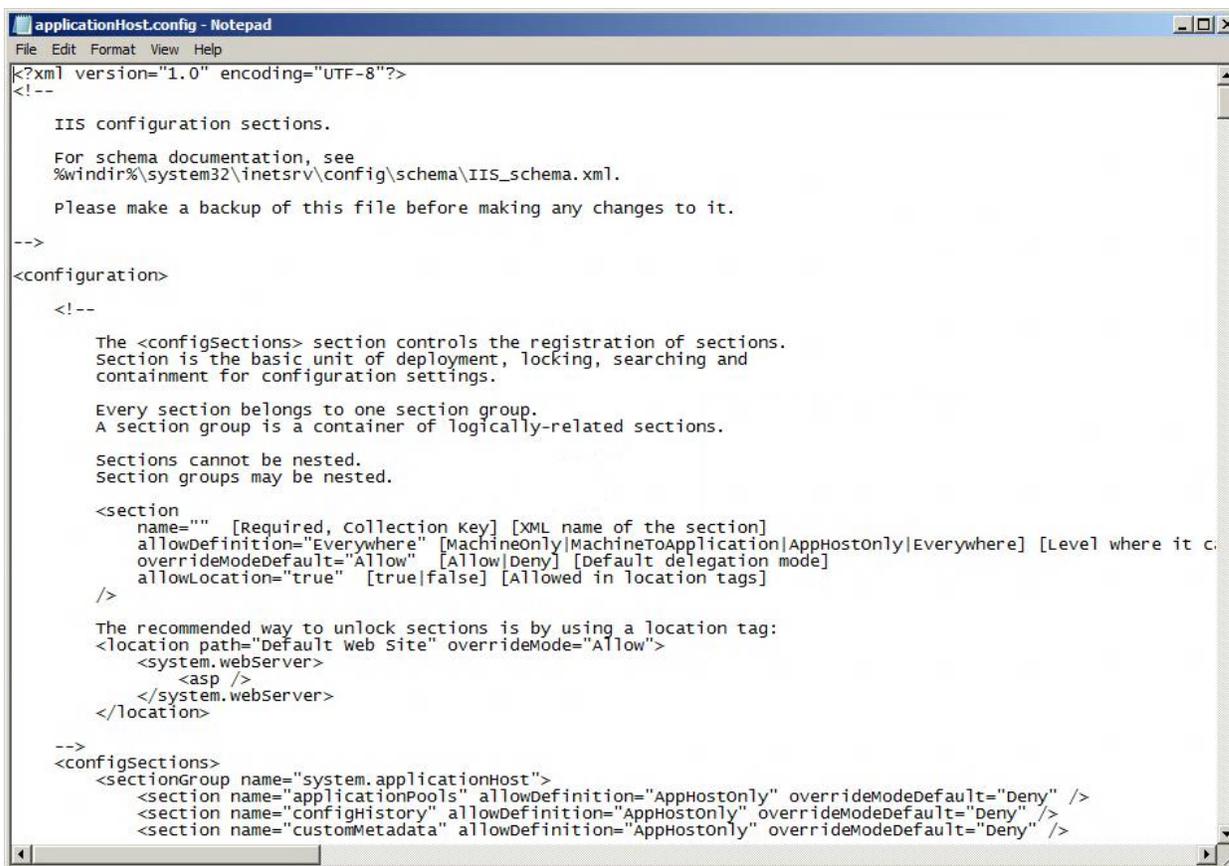
1. Open the **applicationhost.config** file as an administrator.
  - a. Perform one of the following actions, based on your operating system:
    - **Windows 7 / Server 2008:** Click the Windows **Start** menu, type `notepad` in the **Search** text box.
    - **Windows 8 / Server 2012:** Search for **notepad**.
  - 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"?>
<!--
    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>
  <!--
    The <configSections> section controls the registration of sections.
    Section is the basic unit of deployment, locking, searching and
    containment for configuration settings.

    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.

    <section
      name="" [Required, collection key] [XML name of the section]
      allowDefinition="Everywhere" [Machineonly|MachineToApplication|AppHostOnly|Everywhere] [Level where it c.
      overrideModeDefault="Allow" [Allow|Deny] [Default delegation mode]
      allowLocation="true" [true|false] [Allowed in location tags]
    />

    The recommended way to unlock sections is by using a location tag:
    <location path="Default web site" overrideMode="Allow">
      <system.webServer>
        <asp />
      </system.webServer>
    </location>

  -->
  <configSections>
    <sectionGroup name="system.applicationHost">
      <section name="applicationPools" allowDefinition="AppHostOnly" overrideModeDefault="Deny" />
      <section name="configHistory" allowDefinition="AppHostOnly" overrideModeDefault="Deny" />
      <section name="customMetadata" allowDefinition="AppHostOnly" overrideModeDefault="Deny" />
    </sectionGroup>
  </configSections>
</configuration>
```

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.

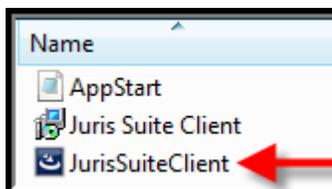
The software is uninstalled.

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

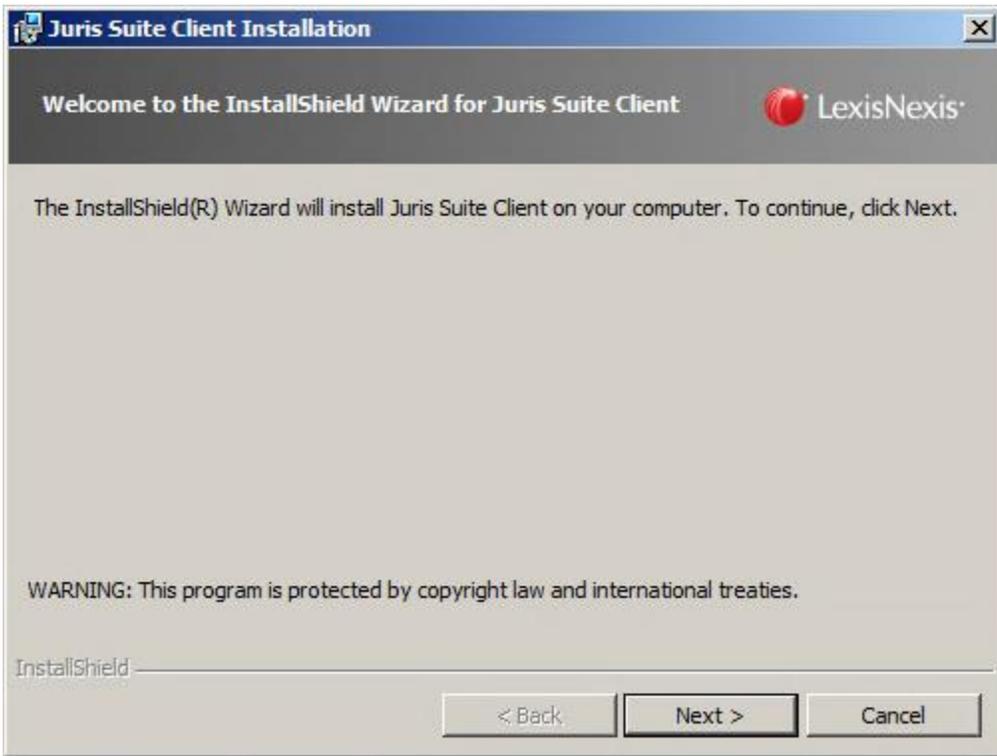
## Installing the Client Software

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.



The Welcome screen appears.



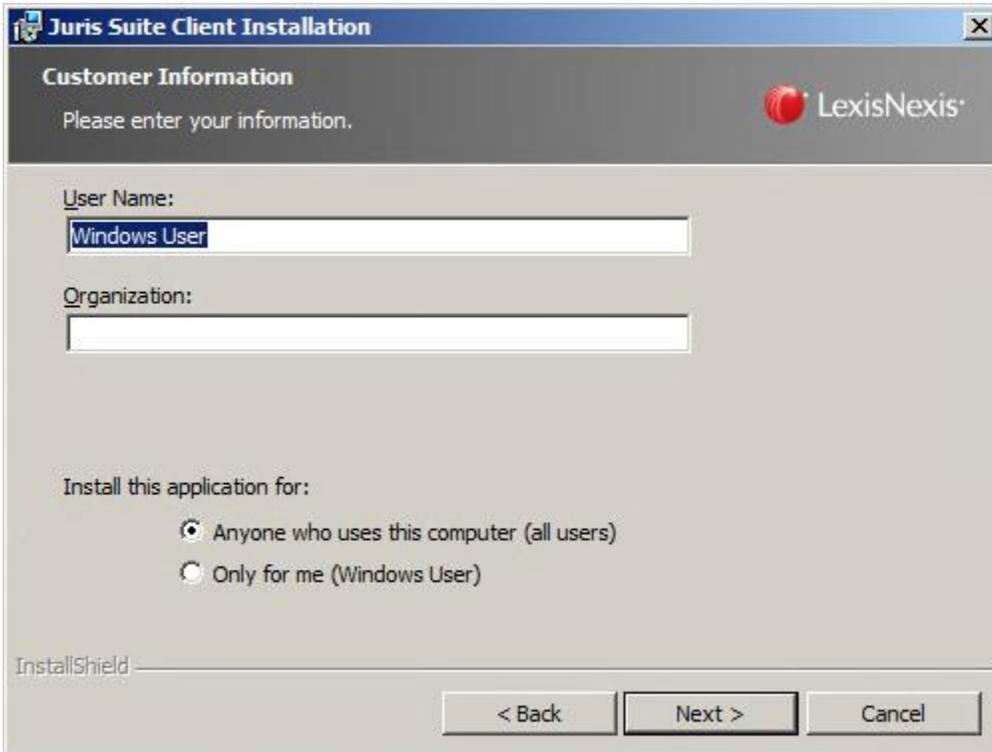
2. Click **Next**.

The License Agreement screen appears.



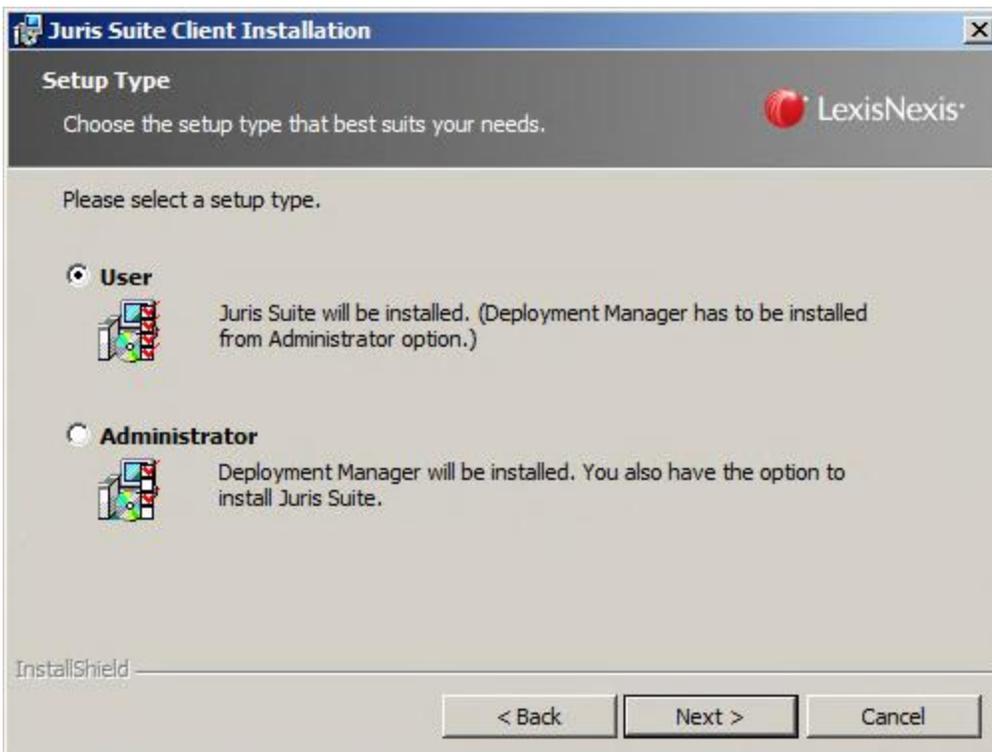
3. Click **I accept the terms in the license agreement**, and click **Next**.

The Customer Information screen appears.



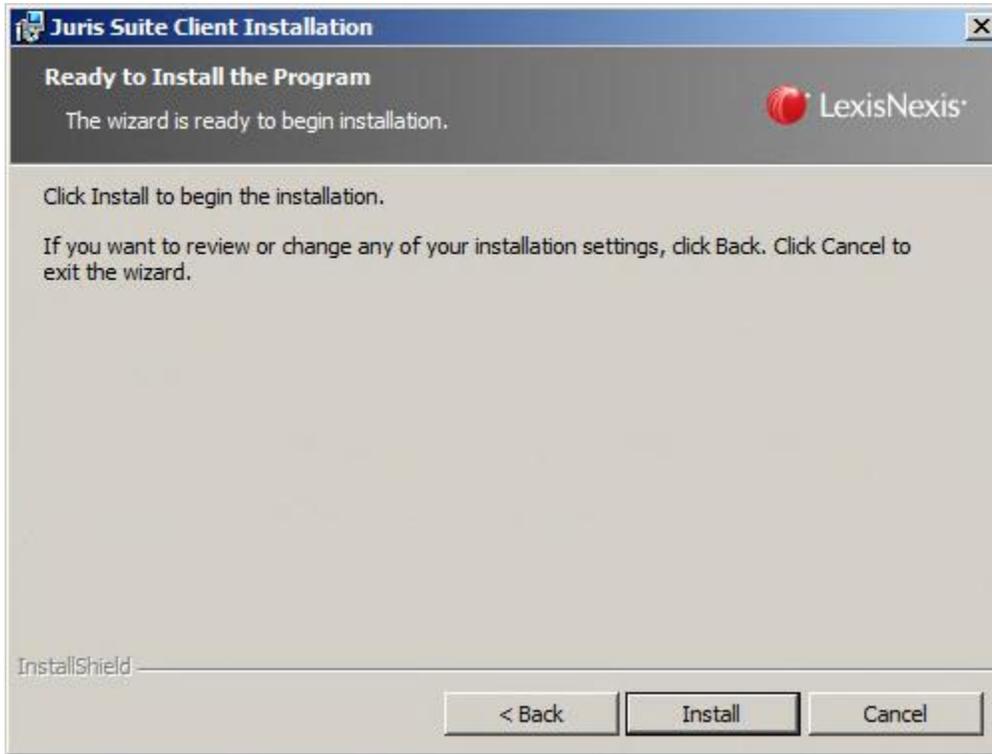
4. Enter the appropriate **Customer Information**, and click **Next**.

The Setup Type screen appears.



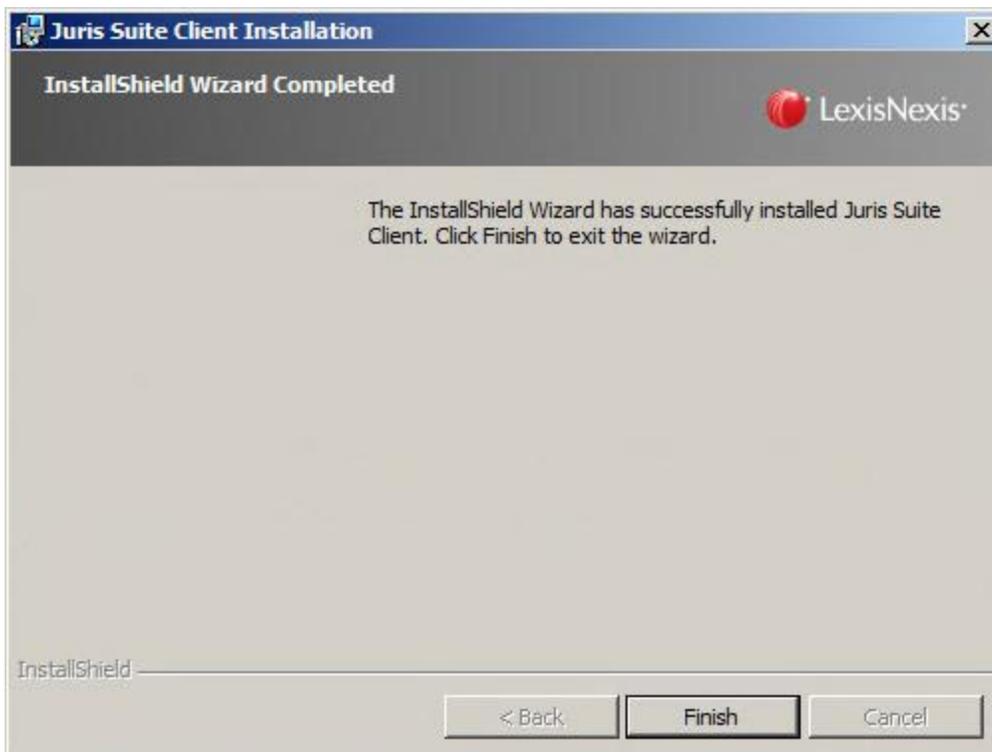
5. Verify that **User** is selected, and click **Next**.

The Ready to Install the Program screen appears.



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.

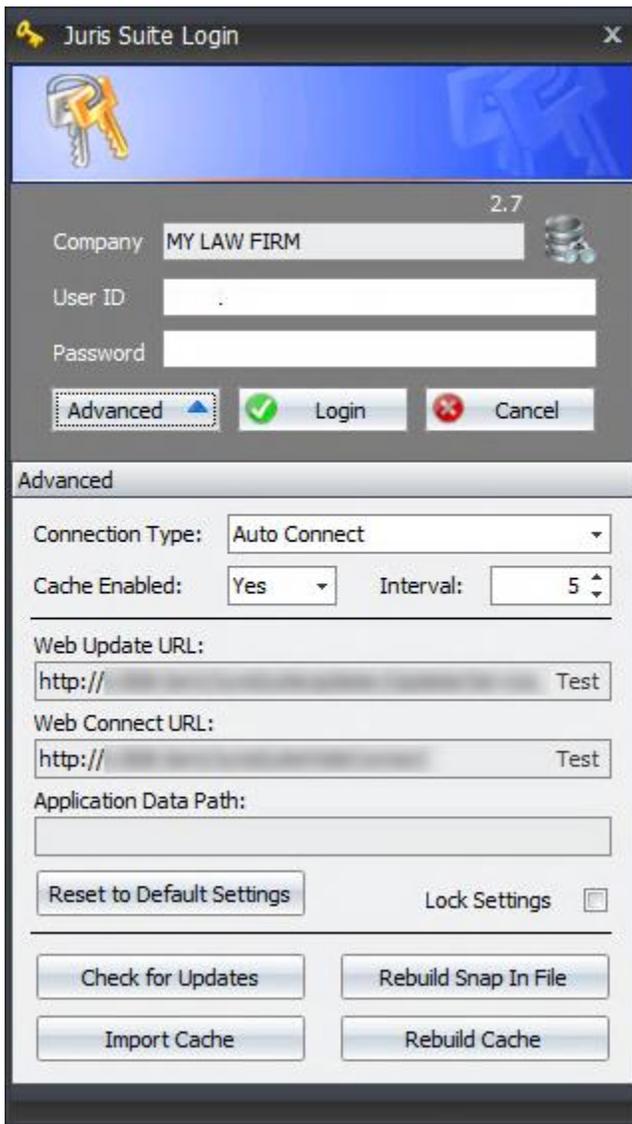
1. Start the Juris Suite client.
  - a. **Windows 7 / Server 2008:** Click **Start**, point to **All Programs / Juris**, and click **Juris Suite**.
  - b. **Windows 8 / Server 2012:** Search for **Juris**, and click **Juris Suite** from the search results.

The Juris Suite Login dialog box appears.

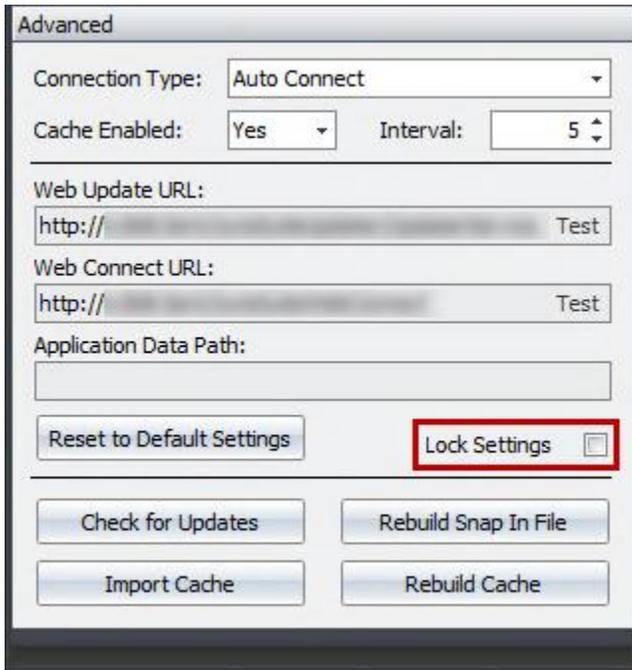


2. Click the **Advanced** button.

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



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



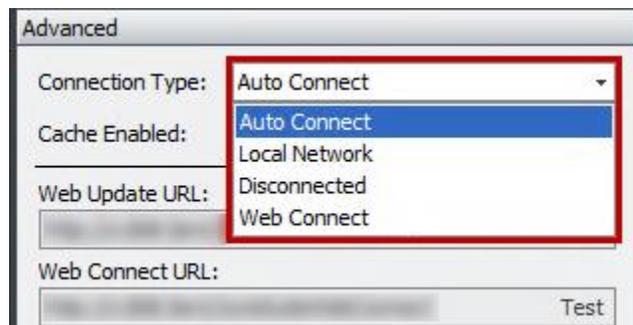
4. In the **Web Update URL** text box, replace **ServerName** with the name of the computer hosting the Juris Suite server (for internal users) or the outside IP address (for Web Connect users).
5. Click **Test** to validate the site.  
A message appears, informing you that the URL path is valid.
6.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



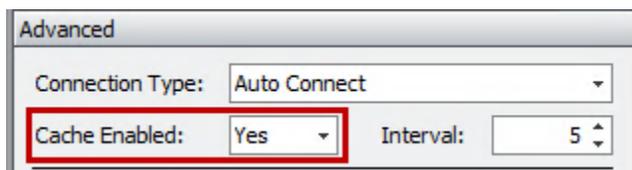
The default option is **Auto Connect**. The program is designed to choose the next lowest

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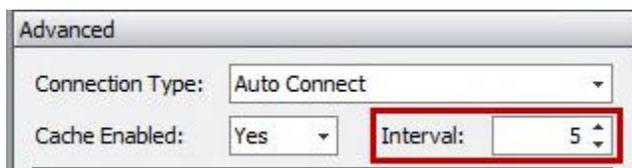
connection type if the selected fails.

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**.



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



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 *pre-populated 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

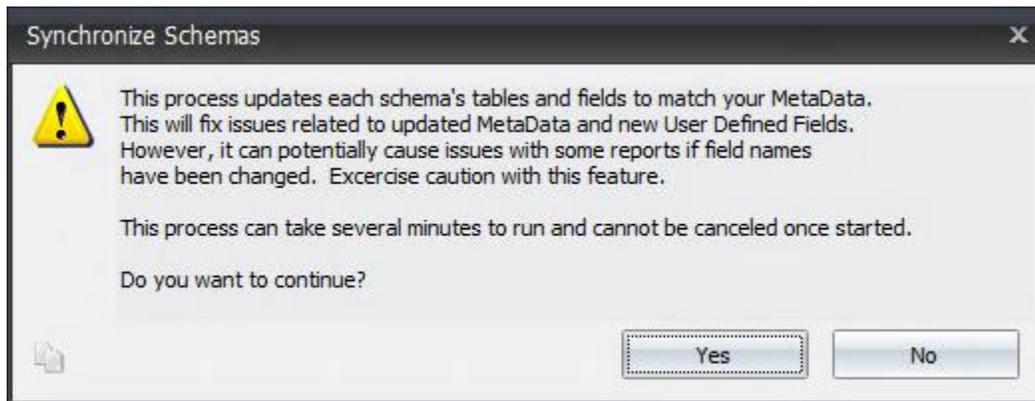
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schema, it uses the metadata to display the tables and the fields. If additional tables or fields have been added to the metadata, they will not be in the existing standard or custom schemas.

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.

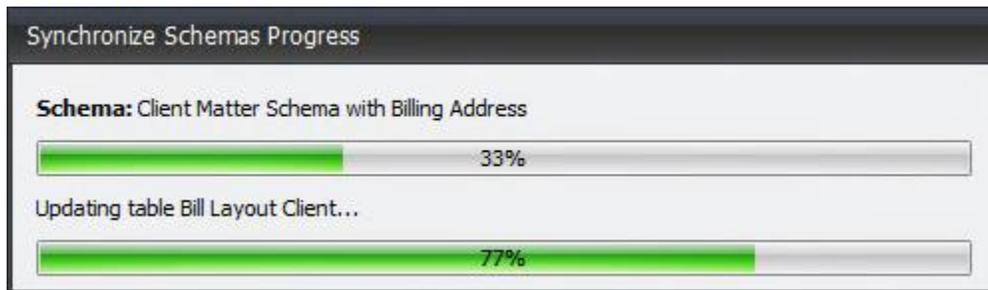
1. Log in to the Juris Suite client as SMGR (with password smgr).  
The main Juris Suite interface appears.
2. In the upper right corner of the interface, click the **Juris** button, point to **Utilities**, and click **Synchronize Schemas**.

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

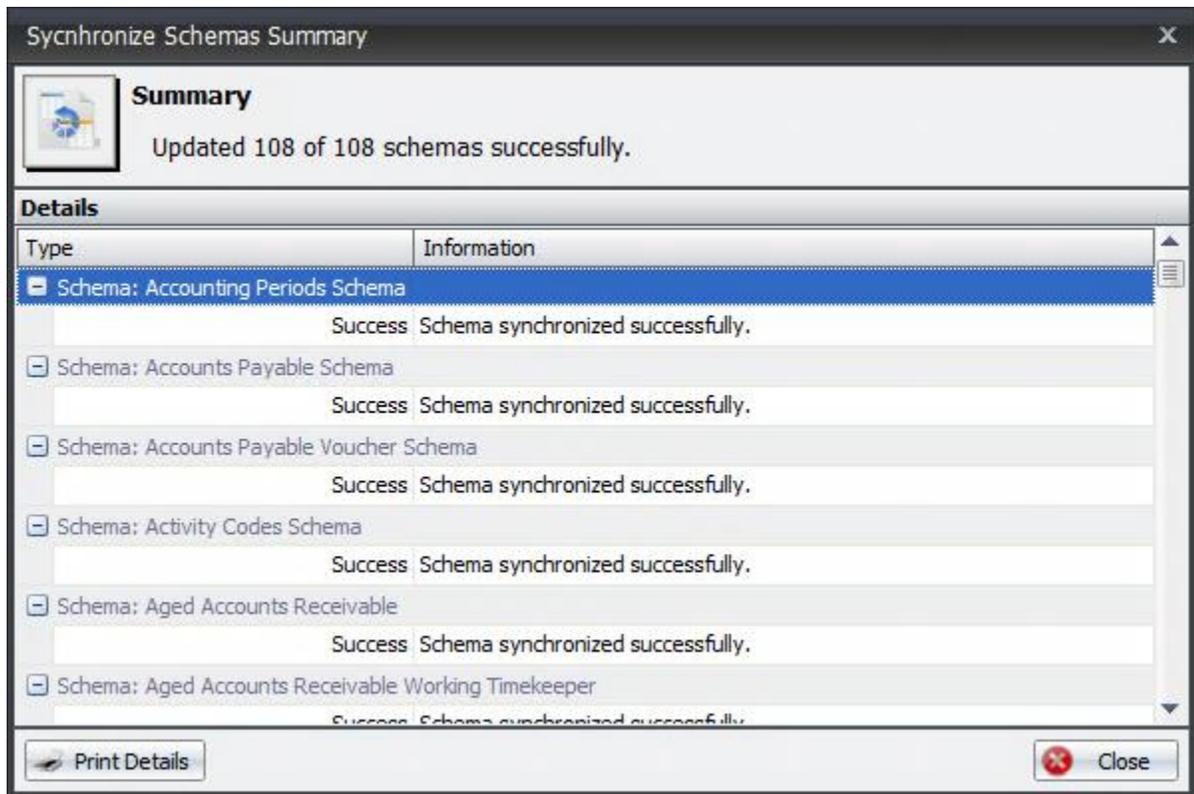


3. Click **Yes** to continue.

The process starts and a status dialog box appears.



Upon completion, the Synchronize Schema Summary dialog box appears.



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

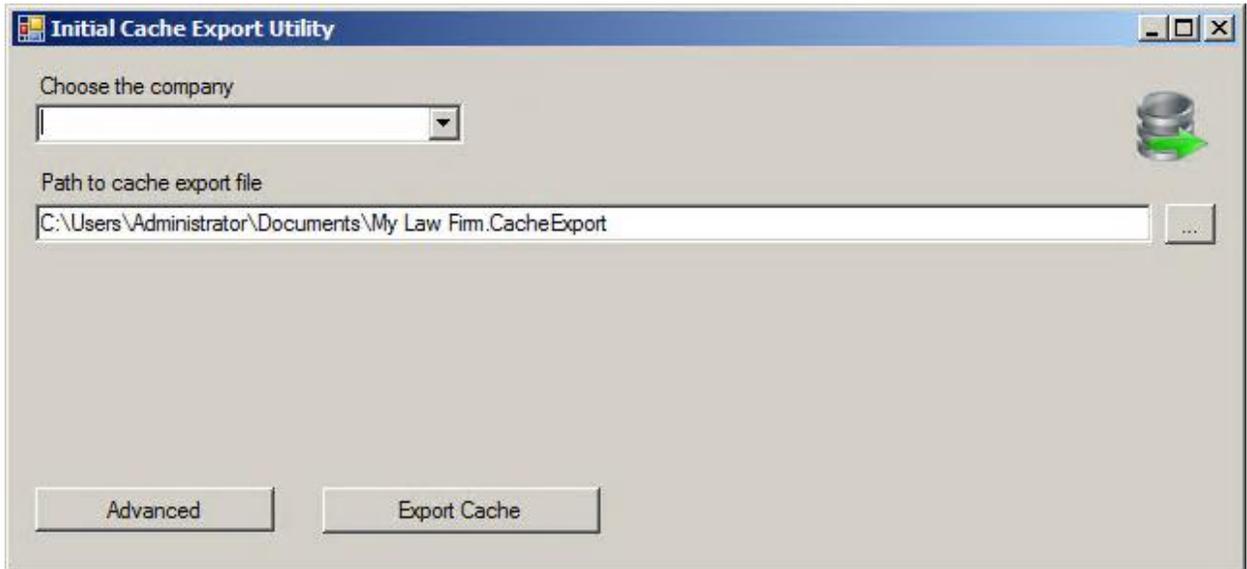
### Creating a Pre-populated Cache

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.

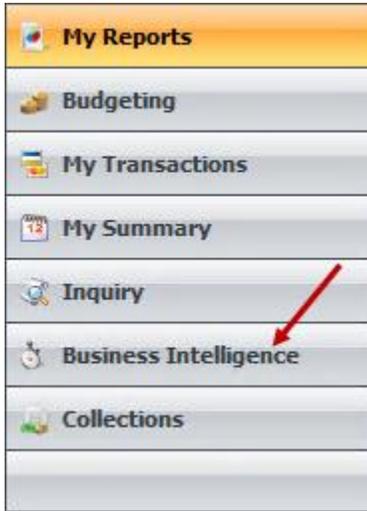


3. Select the **Company to Export**. You must do this for each company if you have more than one.
4. Enter the path to save the cache file. Make sure that it is a location that can be accessed by those wanting to import. You can also use the **browse (...)** button to navigate to the location.
5. Click 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).

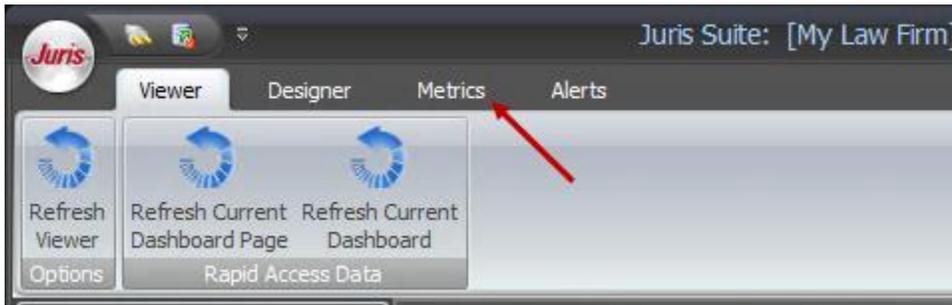
### ***Publishing the Juris Suite Dashboard Metrics***

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.



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.

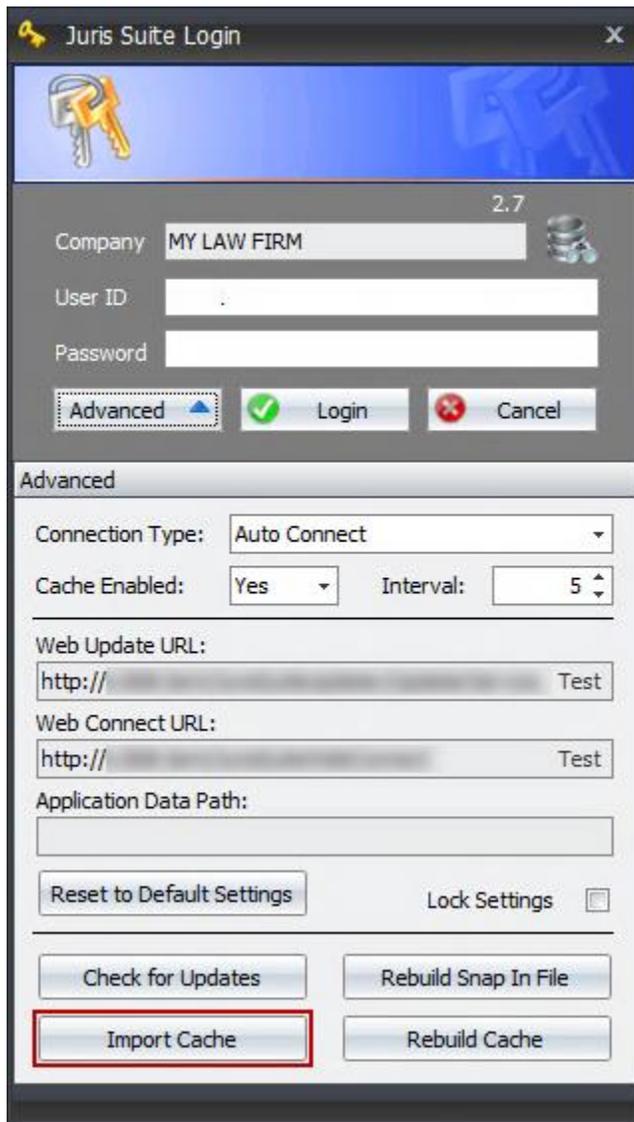
5. Click **Yes**.
6. After the metrics have been published, click **OK**.

### **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.



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](#).