Juris Installation / Upgrade Guide

Version 2.8



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TOC

Copyright and Trademark	4
Before You Begin	. 5
About Upgrading Versus New Installations	6
Upgrading an Existing Installation	. 6
Performing a New (Clean) Installation	6
System Requirements	7
Network Configuration	7
Server Requirements	7
Client Requirements	7
Database Backup	7
Installation / Upgrade Checklist	. 8
Installing/Upgrading the Juris Server	. 9
Starting the Juris Server Installation	9
Completing the License Upgrade Process (New Installation Only)	.14
Creating the Juris Database (New Installation Only)	.15
Updating the Existing Juris Database (Upgrade Only)	.18
Completing the Juris Server Installation	.19
Installing/Upgrading the Juris Application (Client)	. 21
Installing/Upgrading the Juris Administrative Utilities	. 27
Installation/Upgrading Reference	. 33
Backing Up Your Juris Databases	. 34
Backing Up Your Databases Using SQL Server 2008 / 2012	34
Backing Up the Juris Database	.34
Backing Up the JBills Database	. 39
Verifying Backup File Contents	.40
Backing Up Your Databases Using SQL Server 2014	. 42
Backing Up the Juris Database	.42
Backing Up the JBills Database	.47
Verifying Backup File Contents	.48
Creating a New SQL Server Backup Device	. 50
Migrating Your Database	. 55

Updating Your Database	56
Uninstalling Juris	57

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https://www.lexisnexis.com/business-of-law/products/practice-management/juris

Before You Begin

Thank you for choosing Juris software. It is highly recommended that you complete the following steps prior to beginning the installation process:

- 1. Read through these instructions completely.
- 2. If you have any questions regarding these instructions, contact Juris Support to clarify those issues before attempting the installation.
- 3. Verify that there are no users currently connected to the Juris server.
- 4. Disable virus scanning during the installation.

Make sure a supported version of SQL Server is already installed on the computer that will function as your dedicated Juris server. Also be sure your edition of SQL Server will meet your database size needs.

Tip

For more information on supported versions of SQL Server with Juris refer to the Juris Support site:

https://lexisnexis.custhelp.com/app/juris

Search on the string "SQL" to find related articles.

About Upgrading Versus New Installations

The following behavior regarding the upgrading and installation of Juris should be understood prior to installing the software.

Upgrading an Existing Installation

If you are upgrading to Juris version 2.8.4, the previous version of Juris must be completely uninstalled before Juris 2.8.4 can be installed. This requirement is due to the upgraded framework in Juris 2.8.4. The uninstall process is performed *automatically* by the Juris installation wizard. However, you will be prompted prior to the removal of the old version.

Upgrading Juris in this way does not affect your database. Your database will be upgraded as it currently exists so that it will function correctly with Juris 2.8.4. *No data within the database is removed*. As with the upgrading of Juris, the upgrading of your database is also performed automatically by the installation wizard and its related components.

If you are upgrading from a version of Juris prior to 2.61, your database will be updated to 2.61 and then to the current version. This will be done automatically and no additional steps are needed.

The entire upgrade process, including upgrade prompts and the database upgrade, is described in this document.

Prior to starting an upgrade installation, review the following sections:

- Before You Begin
- System Requirements
- Installation / Upgrade Checklist

Performing a New (Clean) Installation

If you are installing Juris on a computer that has never had Juris installed before, the installation process is relatively simple. The installation wizard will provide step-by-step instructions.

Simply be sure that your computer is ready to support Juris by reviewing the information in the following sections:

- Before You Begin
- System Requirements
- Installation / Upgrade Checklist

System Requirements

The following requirements must be met before installing Juris on your system.

Network Configuration

LexisNexis supports the Juris software on the following type of network:

- A properly configured Novell or Microsoft network
- Network software needs to be a current version with all service packs applied
- Access to a qualified network engineer

Server Requirements

For complete details on the server requirements for a Juris installation, including supported operating systems and third-party software recommendations, refer to the following website:

https://lexisnexis.custhelp.com/app/juris

Client Requirements

For complete details on the client (application) requirements for a Juris installation, including supported operating systems and third-party software recommendations, refer to the following website:

https://lexisnexis.custhelp.com/app/juris

In addition, an environment with the following features is recommended:

- Laser printers for performance and check printing
- Internet access
- A recordable CD-R/DVD-R to improve the ability of LexisNexis to provide enhanced support

Database Backup

It is highly recommended that you backup your current Juris database before upgrading your current installation.

For more information, see Backing Up Your Juris Databases.

Installation / Upgrade Checklist

The following checklist can be used, if desired, when installing or upgrading Juris.

Juris Pre-I	Juris Pre-Installation Checklist			
	1.	Review the hardware and software requirements. Verify that your site meets or exceeds the minimum requirements.		
	2.	Verify the SQL Server is installed and is accessible. For more information, contact your local SQL Server administrator.		
	3.	Verify that you have downloaded the Juris installation files from the following website: https://lexisnexis.custhelp.com/app/juris		
	4.	(Upgrade only) Verify that all users have closed Juris (if upgrading the version or migrating the database).		
	5.	(Upgrade only) Verify that Juris is in Maintenance Mode (if upgrading the version or migrating the database). This mode prevents users from attempting to log into Juris, which is useful during the upgrading process.		
		For more information on using Maintenance Mode, refer to the Juris Online Help available from the following website:		
	,			
	6.	(Upgrade only) Verify that the Juris database has been backed up and that the backup version is available. For more information, see Backing Up Your Juris Databases.		
	7.	Verify that all Microsoft Product CDs and license codes are available in case a re-installation is necessary.		

Installing/Upgrading the Juris Server

This section describes how to install the server portion of the Juris software. The server, once installed, can be accessed by one or many Juris client installations.

Note

All screen shots in the following procedures are shown as they appear on Windows Server 2012. If you are using a different, supported operating system, the appearance of the installation wizard and related tools may vary slightly.

For more information on installing the Juris client, see Installing/Upgrading the Juris Application (Client).

The server installation process involves the following basic steps:

- Starting the Juris server software installation wizard
- Enter the license key for your upgrade
- Completing database-related tasks:
 - New Installation: Creating your Juris database
 - Upgrade: Updating your database to use the new version of Juris
- Completing the installation and closing the installation wizard

Starting the Juris Server Installation

The Juris server installation is performed by an installation wizard, which guides you through each step in the process.

- Verify that you have downloaded the Juris installation file package from the Juris Support website: https://lexisnexis.custhelp.com/app/juris
- 2. Verify that you have your license information.
- 3. Verify that you are logged into the computer that will run the Juris server, and that you are the administrator or a user with administrative privileges.
- 4. Open the folder that contains the Juris installation files that you downloaded.
- 5. Double-click the Juris_Server_Setup_2.8x.exe file to run it.

Note

File extensions may or may not be displayed, based on your Windows settings. For more information, contact your local system administrator.

😋 Juris Administrative Utilities Setup 2.82.exe	6/22/2018 8:51 AM	Application
Suris Application Setup 2.82.exe	6/22/2018 8:50 AM	Application
🔩 Juris Server Setup 2.82.exe 🛛 🧲 🗕	6/22/2018 8:51 AM	Application

6. If prompted, install the Microsoft .NET Framework 4.5 Web environment.

Note

This screen only appears if you do not have Microsoft .NET Framework 4.5 currently installed on your computer.

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

Upgrade Only

If you are upgrading from a previous version of Juris, a message appears, stating that the existing (previous) version of Juris must be uninstalled. This process is completed automatically by the installation wizard. Click **OK** to verify this step. The search for an existing Juris installation may take several minutes, as all local drives are scanned, and larger drives will take longer to search than smaller drives.

The Juris Server installation wizard appears showing the Welcome screen.

🖶 Juris Server - InstallShield Wizard	×
Welcome to the InstallShield Wizard for Juris Server	CexisNexis
The InstallShield(R) Wizard will allow you to modify, repair, or remove Ju click Next.	ris Server. To continue,
InstallShield	
< Back Next	> Cancel

8. Click Next.

The License Agreement screen appears.

B	Juris Server	r - InstallShield	Wizard	×
License Agr Please read	eement I the following license agree	ement carefully.	0	LexisNexis
IMPORTANT: FOR SUBSCRIBERS OF JURIS® FROM LEXISNEXIS, DOWNLOADING OF THIS COMPONENT SHALL BE GOVERNED UNDER THE TERMS OF THE SUBSCRIPTION AGREEMENT. FOR ALL OTHERS, THE FOLLOWING SHALL APPLY. LexisNexis, a division of Reed Elsevier Inc., ("Company") owns this software. This Software Agreement ("Agreement") is a legal agreement between you (either an individual or a single entity) and Company for the software that accompanies this Agreement, which includes associated media and internet- based services, if any ("Product"). Capitalized terms are defined in the last section of this Agreement.				
O I accept the	terms in the license agree	ment		Print
I do not accept the terms in the license agreement InstallShield				
		< Back	Next >	Cancel

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

The Destination Folder screen appears, which allows you to specify the location where the application files are installed.

B	Juris Server - Insta	IIShield Wizard	×			
Destinat Click Nex	Destination Folder Click Next to install to this folder, or click Change to install to a different folder.					
	Install Juris Server to: C:\Program Files (x86)\Juris\		Change			
InstallShield -	<	Back Next >	Cancel			

By default, Juris is installed in one of the following folders, based on your operating system type:

- 32-bit systems: C:\Program Files\Juris
- 64-bit systems: C:\Program Files (x86)\Juris

Note

When upgrading from a previous version of Juris, the default directory is changed from Juris2 to simply Juris (as listed above).

- 10. (optional) Change the installation folder for the server files by clicking the **Change** button and specifying a different folder.
- 11. Click Next.

The Ready to Install the Program screen appears.

i ²	Juris Server - InstallShield Wizard	×
Re	ady to Install the Program he wizard is ready to begin installation.	tis
c	lick Install to begin the installation.	
Ite	f you want to review or change any of your installation settings, click Back. Click Cancel to xit the wizard.	
Install	Shield	_
Install	< Back Install Cancel	

12. Click Install.

The installation process begins. After a few moments, the Juris License Upgrade Wizard screen appears.

	Juris Li	icense Upgrade Wizard	
CD Key			
Client Code	- 000		
Client Name			
		Cancel Next	

- 13. Enter your CD Key, Client Code, and Client Name in the corresponding boxes.
- 14. Click Next.
- 15. Proceed to one of the following topics, based on the type of installation you are performing:
 - New Installation: Completing the License Upgrade Process (New Installation Only)
 - Upgrade Installation: Updating the Existing Juris Database (Upgrade Only)

Completing the License Upgrade Process (New Installation Only)

If you are performing a new (non-upgrading) installation of Juris, you need to specify a path to use to save the license file. The folder containing the license must be shared and visible to all client PCs.

1. Verify that you have started the installation process as described in Starting the Juris Server Installation.

After you specify your license information, the shared files message appears.

	Juris License Upgrade Wizard
Please spec be located fo	ify where you would like the shared files to or this instance of Juris.
Folder	
	Cancel Back Next

- 2. Specify a folder where shared files are stored.
- 3. Click Next.

When the license upgrade is complete, a message is displayed.

Juris License Upgrade Wizard
Upgrade successfully completed.
Exit

4. Click Exit.

The Juris Database Constructor application appears.



5. Proceed to Creating the Juris Database (New Installation Only).

Creating the Juris Database (New Installation Only)

If you are performing a new (non-upgrading) installation of Juris, you need to create a database for your Juris server. The installation wizard walks you through the process using the Juris Database Constructor utility.

1. Verify that the Juris Database Constructor utility is running from a Juris installation as described in Starting the Juris Server Installation.

The utility should have automatically started after the Juris License Upgrade Wizard completed.

2. Select the correct company (which matches the **Client Name** supplied earlier in Starting the Juris Server Installation) in the large text box at the top of the application.



3. Click Run.

The Server List dialog box appears, showing all servers currently hosting a SQL Server instance.

Server List	x
Please select, or manually enter, the server name	to ho
Please select a server to host the Juris Database.	
2012R2STD	
2012R2STD	
Conne	ect

- 4. Select the server that will host the Juris database.
- 5. Click Connect.

The database is created, and several messages (similar to the example below) appear.



When the creation process is complete and successful, a message appears showing the name of the new database.



6. Click OK.

The Wizard Completed screen appears.

谩	Ju	ris Serve	er - Inst	allShie	ld Wi	zard			x
Installs	ihield Wizard Com	pleted					() L	.exisNe	exis
The Insta	llShield Wizard has s	uccessfull	y installed	Juris Ser	ver. Clic	k Finish ta	o exit th	e wizard.	
Shov	v the Windows Insta	ller log							
InstallShield	1			< Back		Finish		Cancel	

7. Proceed to Completing the Juris Server Installation.

Updating the Existing Juris Database (Upgrade Only)

If you are upgrading your Juris installation, the installation wizard automatically runs the Database Revision Update utility, which will update your database so that it can be used with the new version of Juris Server.

Note

If you are updating from version 2.5x or earlier, the Database Revision Update utility will automatically execute twice. This behavior is expected and requires no interaction from the user. When the process is complete, the database will be fully updated to the latest version.

- 1. Verify that you have started the installation and specified your license information as described in Starting the Juris Server Installation.
- 2. Click **Next** on the Juris License Upgrade Wizard screen.

The Database Revision Update utility is automatically started, and several screens appear (similar to the example below) showing you that your database is being updated.

Applying Revisions to 9999009		
	Iuric	
	Juris	

The Wizard Completed screen appears.

谩	Juris Server - InstallShield Wizard	x
InstallShie	ld Wizard Completed	xisNexis
The InstallSh	eld Wizard has successfully installed Juris Server. Click Finish to exit the w	izard.
Show the	e Windows Installer log	
InstallShield —		
	< Back Finish	Cancel

3. Proceed to Completing the Juris Server Installation.

Completing the Juris Server Installation

Once Juris has been installed, you can close the installation wizard and install additional Juris components, as necessary.

1. Verify that the Wizard Completed screen is displayed, which means that your database creation/upgrade was successful.

Tip

If the "Registering Files" portion of the installation process takes longer than a few minutes to complete, you can manually end the **MSI*****.tmp process via the Windows Task Manager to continue the installation. This action will not adversely affect the overall installation, if the process is allowed to run for a few minutes. For more information on accessing and using the Windows Task Manager, contact your local systems administrator.

谩	Juris Server - InstallShield W	ïzard X
InstallShie	ld Wizard Completed	CexisNexis
The InstallShi	eld Wizard has successfully installed Juris Server. Cl	ick Finish to exit the wizard.
Show the	e Windows Installer log	
InstallShield —	< Back	Finish Cancel

- 2. (optional) Click the **Show the Windows Installer log** check box if you want to view the log file (for detailed installation information). If selected, the log file automatically appears when you exit the Juris installation wizard.
- 3. Click Finish.

The installation wizard is closed.

4. If you are constructing a new database for use with Juris (not restoring a backed-up database), you need to run the Database Revision Update tool as described in Updating Your Database.

The Juris Server installation is complete.

- 5. Proceed to one of the following topics for additional installation instructions, as needed:
 - Juris Application (Client): Installing/Upgrading the Juris Application (Client)
 - Juris Administrative Tools: Installing/Upgrading the Juris Administrative Utilities

Installing/Upgrading the Juris Application (Client)

The Juris Application Setup file installs the client files required to access and use the Juris server. The client must be installed separately on each computer that will be used to access Juris.

Note

All screen shots in the following procedure are shown as they appear on Windows Server 2012. If you are using a different, supported operating system, the appearance of the installation wizard may vary slightly.

For more information on installing the Juris server, see Installing/Upgrading the Juris Server.

Tip

The client installation file can be saved to a shared (network) folder allowing for easier access from multiple, client computers.

The Juris application (client) installation is performed by an installation wizard, which guides you through each step in the process.

- 1. Verify that you are logged into the computer that will run the Juris client, and that you are the administrator or a user with administrative privileges.
- 2. Navigate to the location of the Juris installation files that you downloaded earlier.
- 3. Double-click the Juris_Application_Setup_2.8x.exe file to execute it.

Note

File extensions may or may not be displayed, based on your Windows settings. For more information, contact your local system administrator.

🔩 Juris Administrative Utilities Setup 2.82.exe	6/22/2018 8:51 AM	Application
🔩 Juris Application Setup 2.82.exe 🧹 🗕	6/22/2018 8:50 AM	Application
🔩 Juris Server Setup 2.82.exe	6/22/2018 8:51 AM	Application

4. If prompted, install the Microsoft .NET Framework 4.5 Web environment.

Note

This screen only appears if you do not have Microsoft .NET Framework 4.5 already installed on your computer.

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

Upgrade Only

If you are upgrading from a previous version of Juris, a message appears, stating that the existing (previous) version of the Juris application (client) must be uninstalled. This process is completed automatically by the installation wizard. Click **OK** to verify this step. The search for an existing Juris installation may take several minutes, as all local drives are scanned, and larger drives will take longer to search than smaller drives.

The Juris Application installation wizard appears showing the Welcome screen.

授 Juris A	Application -	InstallShi	eld Wizard	ł	x
Welcome to the InstallSh	ield Wizard for	Juris Applic	ation	Cex (isNexis
The InstallShield(R) Wizard w	ill install Juris App	lication on you	ur computer. 1	To continue, c	lick Next.
WARNING: This program is pr	otected by copyr	ight law and in	ternational tr	eaties.	
InstallShield		< Back	Nevt		ancel
		S DOCK	Next >		ancei

6. Click Next.

The License Agreement screen appears.

1	Juris Application - Installs	hield Wizard	x
License a Please r	Agreement ead the following license agreement carefully.	Cexis N	exis
IMPORTA THIS COM AGREEME LexisNex This Soft (either ar accompa based se Capitalize	NT: FOR SUBSCRIBERS OF JURIS® FROM LE PONENT SHALL BE GOVERNED UNDER THE T NT. FOR ALL OTHERS, THE FOLLOWING SH s, a division of Reed Elsevier Inc., ("Comp ware Agreement ("Agreement") is a lega individual or a single entity) and Compar hies this Agreement, which includes asso rvices, if any ("Product"). d terms are defined in the last section of	EXISNEXIS, DOWNLOADING OF TERMS OF THE SUBSCRIPTION ALL APPLY. Dany") owns this software. I agreement between you by for the software that ociated media and internet-	<
 I accept I do not 	the terms in the license agreement accept the terms in the license agreement	Print	
	< Back	Next > Cance	

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

The Destination Folder screen appears, which allows you to specify the location where the application files are installed.

₿	Juris Application - InstallShield Wizard	
Destinati Click Next	to install to this folder, or click Change to install to a different folder.	
	Install Juris Application to: C:\Program Files (x86)\Juris\ Change	
InstallShield -	< Back Next > Cancel	-

By default, Juris is installed in one of the following folders, based on your operating system type:

- 32-bit systems: C:\Program Files\Juris
- 64-bit systems: C:\Program Files (x86)\Juris

Note

When upgrading from a previous version of Juris, the default directory is changed from Juris2 to simply Juris (as listed above).

- 8. (optional) Change the installation folder for the server files by clicking the **Change** button and specifying a different folder.
- 9. Click Next.

The Ready to Install the Program screen appears.

₿	Juris Application - InstallShield Wizard
R	eady to Install the Program The wizard is ready to begin installation.
	Click Install to begin the installation.
	If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
Insta	illShield

10. Click Install.

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

Tip

If the "Registering Files" portion of the installation process takes longer than a few minutes to complete, you can manually end the **MSI*****.tmp process via the Windows Task Manager to continue the installation. This action will not adversely affect the overall installation, if the process is allowed to run for a few minutes. For more information on accessing and using the Windows Task Manager, contact your local systems administrator.

₿	Juris Application - InstallShield Wizard	×
Instal	IShield Wizard Completed 🌔 Lex	isNexis
The Ir wizar	nstallShield Wizard has successfully installed Juris Application. Click Finish to exit d.	the
🗌 Sho	ow the Windows Installer log	
InstallShie	eld < Back Finish C	Cancel

- 11. (optional) Click the **Show the Windows Installer log** check box if you want to view the log file (for detailed installation information). If selected, the log file automatically appears when you exit the Juris installation wizard.
- 12. Click Finish.

The client installation is complete. You can now use the client to access your Juris server.

13. Repeat these steps on each computer that will be running the Juris client.

Installing/Upgrading the Juris Administrative Utilities

Although not necessary to complete a Juris Server or Juris Application (Client) installation, it is recommended that the Juris Administrative Utilities be installed as they may be needed for post-installation administrative tasks.

Note

All screen shots in the following procedure are shown as they appear on Windows Server 2012. If you are using a different, supported operating system, the appearance of the installation wizard may vary slightly.

The following utilities are included in the installation:

- Juris Management Console
- Database Constructor
- Database Revision Update

The utilities are installed using one of the files included in the Juris software installation download package.

- 1. Verify that you are logged into the computer that will run the Juris administrative tools, and that you are the administrator or a user with administrative privileges.
- 2. Navigate to the location of the Juris installation files that you downloaded earlier.
- 3. Double-click the Juris_Administrative_Utilities_Setup_2.8x.exe file.

Note

File extensions may or may not be displayed, based on your Windows settings. For more information, contact your local system administrator.



4. If prompted, install the Microsoft .NET Framework 4.5 Web environment.

Note

This screen *only appears* if you *do not* have Microsoft .NET Framework 4.5 currently installed on your computer.

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

Upgrade Only

If you are upgrading from a previous version of Juris, a message appears, stating that the existing (previous) version of the Juris tools must be uninstalled. This process is completed automatically by the installation wizard. Click **OK** to verify this step.

The Juris Administrative Tools installation wizard appears showing the Welcome screen.

₽	Juris Administrative Tools - InstallShield Wizard	x
Welcome to th Tools	he InstallShield Wizard for Juris Administrative 🛛 🌘 LexisNe	xis
	and the second	*
The InstallShield(dick Next.	R) Wizard will install Juris Administrative Tools on your computer. To continue,	
WARNING: This n	rogram is protected by convright law and international treaties	
InstallShield		
	< Back Next > Cancel	

6. Click Next.

The License Agreement screen appears.

Juris Administrative Tools - InstallShield Wizard	ł	x
License Agreement Please read the following license agreement carefully.	LexisNe	exis
IMPORTANT: FOR SUBSCRIBERS OF JURIS® FROM LEXISNEXIS, DOWNLOAD THIS COMPONENT SHALL BE GOVERNED UNDER THE TERMS OF THE SUBSC AGREEMENT. FOR ALL OTHERS, THE FOLLOWING SHALL APPLY. LexisNexis, a division of Reed Elsevier Inc., ("Company") owns this sof This Software Agreement ("Agreement") is a legal agreement betwee (either an individual or a single entity) and Company for the software th accompanies this Agreement, which includes associated media and in based services, if any ("Product"). Capitalized terms are defined in the last section of this Agreement.	DING OF RIPTION tware. n you hat ternet-	< ×
○ I accept the terms in the license agreement	Print	
I do not accept the terms in the license agreement InstallShield		
< Back Next >	Cancel	

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

The Destination Folder screen appears, which allows you to specify the location where the administrative tools files are installed.

₿	Juris Administrative Tools - InstallShield Wizard
Destinati Click Next	to install to this folder, or click Change to install to a different folder.
	Install Juris Administrative Tools to: C:\Program Files (x86)\Juris\ Change
InstallShield -	< Back Next > Cancel

By default, Juris is installed in one of the following folders, based on your operating system type:

- 32-bit systems: C:\Program Files\Juris
- 64-bit systems: C:\Program Files (x86)\Juris

Note

When upgrading from a previous version of Juris, the default directory is changed from Juris2 to simply Juris (as listed above).

- 8. (optional) Change the installation folder for the administrative tools files by clicking the **Change** button and specifying a different folder.
- 9. Click Next.

The Ready to Install the Program screen appears.

1 ²⁰	Juris Administrati	ve Tools - Insta	IIShield Wizar	d X
Ready to The wizar	Install the Program rd is ready to begin installati	on.	()	LexisNexis
Click Inst	all to begin the installation.	a car		
If you wa exit the v	ant to review or change any wizard.	of your installation s	ettings, click Back. (Click Cancel to
InstallShield				
		< Back	Install	Cancel

10. Click Install.

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

12	Juris Administrative Tools - InstallShield Wizard	x
Insta	IIShield Wizard Completed	Nexis
The In the wi	istallShield Wizard has successfully installed Juris Administrative Tools. Click Finish t zard.	o exit
□ Sh InstallShi	eld	ncel

- 11. (optional) Click the **Show the Windows Installer log** check box if you want to view the log file (for detailed installation information). If selected, the log file automatically appears when you exit the Juris installation wizard.
- 12. Click Finish.

The installation wizard is closed. The Juris tools are now ready for use. If you have already installed the Juris server and Juris clients, Juris is now completely installed and ready for use. The installation process is complete.

Installation/Upgrading Reference

This sections contains information that may be necessary when installing or upgrading Juris.

Proceed to one of the following topics for more information:

- Backing Up Your Juris Databases
- Migrating Your Database
- Updating Your Database
- Uninstalling Juris

Backing Up Your Juris Databases

Before upgrading your Juris installation, it is highly recommended that you backup your current databases.

Proceed to one of the following topics, based on the version of SQL Server you are using:

- Backing Up Your Databases Using SQL Server 2008 / 2012
- Backing Up Your Databases Using SQL Server 2014
- Creating a New SQL Server Backup Device

Backing Up Your Databases Using SQL Server 2008 / 2012

You need to use Microsoft SQL Server Management Studio to back up for two Juris system databases: Juris and JBills.

Note

You can also use the Juris Management Console to back up your databases. For more information, refer to the Juris online help.

This procedure describes how to perform these backups using the following versions of SQL Server:

- SQL Server 2008
- SQL Server 2012

Note

All screen shots in the following procedures are shown using SQL Server 2008 as it appears on Windows Server 2008 R2. If you are using a different version of SQL Server or a different, supported operating system, the appearance of SQL Server Management Studio may vary slightly.

If you are using SQL Server 2014, see Backing Up Your Databases Using SQL Server 2014 for complete instructions.

Backing Up the Juris Database

The procedure for backing up the Juris database involves accessing SQL Server Management Studio and specifying backup options such as the set name, backup location, and backup file name.

- 1. Verify that all users have closed the Juris client application.
- 2. Verify that you are logged into the computer that is running SQL Server, and that you are the administrator or a user with administrative privileges.
- 3. Open SQL Server Management Studio using one of the following methods, based on your operating system:

- Windows Server 2008: Click Start, click All Programs, click Microsoft SQL Server, and click SQL Server Management Studio.
- Windows 8 / Server 2012: Search for SQL Server, and click SQL Server Management Studio in the search results.
- 4. On the Connect to Server dialog box, specify your credentials and click **Connect**.

The Microsoft SQL Server Management Studio dialog box appears.



5. On the left side of the dialog box, click the + icon adjacent to the **Databases** node.

Two Juris-related entries should be listed: **Juris** and **JBills**. Each name is appended with your client code (as specified during your Juris installation).

🖃 🐻 w2k8r2ent (SQL Server 10.50.1600 - W2K8R2EN
🖃 🛅 Databases
🕀 🚞 System Databases
표 🚞 Database Snapshots
표 间 JBills9999009
🕀 🧻 Juris9999009
🕀 🚞 Security
🛨 🚞 Server Objects
🕀 🚞 Replication
🛨 🚞 Management
🗄 📸 SQL Server Agent

6. Right-click the Juris database, and click Tasks / Back Up.

The Back Up Database - Juris dialog box appears.

间 Back Up Database - Juris99	999009		
Select a page	🔄 Script 👻 📑 Help		
General	Source		
	Da <u>t</u> abase:	Juris9999009	•
	Recovery model:	BULK_LOGGED	
	Backup type:	Full	•
	Copy-only Backup		
	Backup component:		
	O Database		
	Files and filegroups:		
	Backup set		
	<u>N</u> ame:	Juris9999009-Full Database Backup	
	Description:		
	Backup set will expire:		
	After:	0 days	
Connection	O <u>O</u> n:	11/ 6/2014	
Server:	Destination		
w2k8r2ent	Back up to:	Disk O Tage	
Connection: W2K8R2ENT\Administrator	C:\Program Files\Microsoft SQI	_Server\MSSQL10_50.MSSQLSERVER\MSSQL	A <u>d</u> d
View connection properties			<u>R</u> emove
Progress			Contents
Ready	•	·	
		ОК	Cancel

7. From the **Backup type** drop-down list, verify that **Full** is selected.

8. In the **Backup set** area (middle portion of the right side of the dialog box), enter the name of your backup group in the **Name** text box. All Juris databases backups will be contained within this set.

A suggested name is provided, which you can edit, as desired. For example: JurisBackupSet

Tip

Be sure to note this set name, as you will use it later when backing up the other Juris system database (JBills).

9. In the **Destination** area (lower portion of the right side of the dialog box), click the **Add** button.

The Select Backup Destination dialog box appears, which allows you to specify the name of the database backup file or a predefined backup device.

- 10. If you are specifying a backup file, you need to navigate to the appropriate location and specify a file name.
 - a. Click the ... button adjacent to the to the File name text box.

The Locate Database Files dialog box appears.

- b. Navigate to the appropriate location and click the folder that will contain your backup.
- c. In the **File name** text box, enter the *name and file extension* of the database backup file that will be created when the backup is executed.

Caution

You need to manually specify the file extension (.bak). For example: MyJurisBackup.bak

Your dialog box should appear similar to the following example.



d. Click OK.

You are returned to the Select Backup Destination dialog box, and the file name you specified appears in the **File name** text box.

- 11. If you are specifying a backup device, you need to select it.
 - a. Click Backup device.
 - b. Select the predefined backup device from the corresponding drop-down list.



For more information on creating backup devices, see Creating a New SQL Server Backup Device.

12. Click **OK** to close the Select Backup Destination dialog box.

You are returned to the Back Up Database dialog box, and the new backup file or backup device is now listed in the large text box in the **Destination** area.

13. Click **OK**.

The database backup is executed, and the success message appears.

Microsoft	: SQL Server Management Studio	×
1	The backup of database 'Juris9999009' completed successfully.	
1		OK

14. Click **OK** to close the success message dialog box.

You are returned to the main Microsoft SQL Server Management Studio dialog box. Now you need to backup the other database - JBills.

15. Proceed to Backing Up the Juris Database below.

Backing Up the JBills Database

The procedure for backing up the other Juris system database, JBills, is very similar to the procedure used for the Juris database. However, instead of defining a backup destination (and file) or backup device, the JBills database backup should be added to the destination previously created for the Juris database.

1. On the Databases node, right-click the JBills database, and click Tasks / Back Up.

The Back Up Database - JBills dialog box appears.

- 2. From the **Backup type** drop-down list, verify that **Full** is selected.
- 3. In the **Backup set** area (middle portion of the right side of the dialog box), enter the name of your backup group in the **Name** text box. All Juris databases backups will be contained within this set.

Although suggested name is provided, be sure to specify the *same set name used for the Juris database backup*. For example: JurisBackupSet.

4. In the **Destination** area (lower portion of the right side of the dialog box), click the destination previously defined when creating the Juris database backup.

This action adds the JBills database backup to the same backup file as the Juris database backup.

5. Click OK.

The database backup is executed, and the success message appears.

Microsof	t SQL Server Management Studio	×
1	The backup of database 'JBills9999009' completed successfully.	
		ОК

6. Click **OK** to close the success message dialog box.

You are returned to the main Microsoft SQL Server Management Studio dialog box, and the entire database backup process is complete.

7. Proceed to Verifying Backup File Contents below.

Verifying Backup File Contents

Once you have backed up both the Juris and JBills databases, it is recommended that you view the contents of the backup file to verify that both databases are listed.

1. On the Databases node, right-click either of the two databases (Juris or JBills), and click Tasks / Back Up.

The Back Up Database dialog box appears.

- 2. In the **Destination** area, verify that the destination used for the Juris and JBills database backup is selected (highlighted).
- 3. Click the **Contents** button.

The Device Contents dialog box appears.

Created on:		1	11/6/2014 8:15:51 AM						
edia set —									
Name:									
Descriptio	n:								
Media fan	nily count:		1						
ackyp sets:									
Name	Туре	Com	Server	Database	Positi	Date	Size	User	Ехф
Juris	Data	Full	W2	Juris9999009	1	11/6	388	W2	
Juris	Data	Full	W2	JBills99990	2	11/6	171	W2	

- 4. Verify that both the Juris and JBills databases appear in the Database column, as shown above.
- 5. Click **Close** to return to the Back Up Database dialog box.
- 6. Click Cancel.
- 7. Close Microsoft SQL Server Management Studio.

Backing Up Your Databases Using SQL Server 2014

You need to use Microsoft SQL Server Management Studio to back up for two Juris system databases: Juris and JBills.

Note

You can also use the Juris Management Console to back up your databases. For more information, refer to the Juris online help.

This procedure describes how to perform these backups using only SQL Server 2014.

Note

All screen shots in the following procedures are shown on Windows Server 2014 R2. If you are using a different, supported operating system, the appearance of SQL Server Management Studio may vary slightly.

If you are using SQL Server 2008 or 2012, see Backing Up Your Databases Using SQL Server 2008 / 2012 for complete instructions.

Backing Up the Juris Database

The procedure for backing up the Juris database involves accessing SQL Server Management Studio and specifying backup options such as the set name, backup location, and backup file name.

- 1. Verify that all users have closed the Juris client application.
- 2. Verify that you are logged into the computer that is running SQL Server, and that you are the administrator or a user with administrative privileges.
- 3. Open SQL Server Management Studio using one of the following methods, based on your operating system:
 - Windows Server 2008: Click Start, click All Programs, click Microsoft SQL Server, and click SQL Server Management Studio.
 - Windows 8 / Server 2012: Search for SQL Server, and click SQL Server Management Studio in the search results.
- 4. On the Connect to Server dialog box, specify your credentials and click **Connect**.

The Microsoft SQL Server Management Studio dialog box appears.



5. On the left side of the dialog box, click the + icon adjacent to the **Databases** node.

Two Juris-related entries should be listed: **Juris** and **JBills**. Each name is appended with your client code (as specified during your Juris installation).



6. Right-click the Juris database, and click Tasks / Back Up.

The Back Up Database - Juris dialog box appears.

	Bac	k Up Database - Juris9999009	_ _ X
Select a page	Script 🔻 🖪 Help		
Media Options			
Backup Options	Source		
	Database:	Juris9999009	¥ .
	Recovery model:	BULK_LOGGED	
	Backup type:	Full	
	Сору-опураскир		
	Backup component:		
	Database		
	O Files and filegroups:		
	Destination		
	Back up to:	Disk	
	C:\Program Files\Microsoft SQL Serv	er\MSSQL12.MSSQLSERVER\MSSQL\Backup\MyJurisBackup.bak	Add
C i			
Connection			Remove
2012R2STD			Contents
Connection: 2012R2STD\Administrator			
View connection properties			
Progress			
Ready			
			OK Cancel

- 7. In the **Source** area on the right side of the dialog box, select the **Juris** database from the **Database** dropdown list.
- 8. From the **Backup type** drop-down list, verify that **Full** is selected.
- 9. Verify that **Backup component** is set to **Database**.
- 10. In the **Destination** area, verify that **Disk** is selected from the **Back up to** drop-down list.
- 11. Click the **Add** button.

The Select Backup Destination dialog box appears, which allows you to specify the name of the database backup file or a predefined backup device.

Ũ	Select Bac	kup De	stination			x
Select the file or l backup devices f	oackup device for the or frequently used file	e backup o es.	lestination. Y	/ou can crea	ate	
Destinations on d File name prosoft SQL S	lisk : Server∖MSSQL12.MS	SQLSERV	/ER\MSSQL	\Backup\		
O Backup d	evice:					
JurisBackup	Device			~		
			OK	C	ancel] #

- 12. If you are specifying a backup file, you need to navigate to the appropriate location and specify a file name.
 - a. Click the ... button adjacent to the to the File name text box.

The Locate Database Files dialog box appears.

- b. Navigate to the appropriate location and click the folder that will contain your backup.
- c. In the **File name** text box, enter the *name and file extension* of the database backup file that will be created when the backup is executed.

Caution

You need to manually specify the file extension (.bak). For example: MyJurisBackup.bak

Your dialog box should appear similar to the following example.

U Locate Databa	se Files - 2012R2STD	- 🗆 X
Select the file:		
Documents and Juris_Shared PerfLogs Program Files Documents and Documents and	es	^
Microsoft A Microsoft A Microsoft S	nalysis Services lelp Viewer QL Server	_
	ЮK	
	-12.MSSQLSERVER SQL Backup Binn DATA Install JOBS	
Horizania Microsoft V Microsoft N Microsoft.N	Log isual Studio 10.0 ET	~
Selected path:	C:\Program Files\Microsoft SQL Se	rver\MSSQL12
Files of type:	Backup Files(*.bak;*.tm)	~
File name:	MyJurisBackup.bak	
	ОК	Cancel

d. Click OK.

You are returned to the Select Backup Destination dialog box, and the file name you specified appears in the **File name** text box.

- 13. If you are specifying a backup device, you need to select it.
 - a. Click Backup device.
 - b. Select the predefined backup device from the corresponding drop-down list.

Ū	Select Backup Destination	x
Sel bac	ect the file or backup device for the backup destination. You can create ckup devices for frequently used files.	
De	stinations on disk	
	O File name:	
	C:\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVE	- 1
1.1	Backup device:	
	JurisBackupDevice V	
	OK Cancel]

For more information on creating backup devices, see Creating a New SQL Server Backup Device.

14. Click **OK** to close the Select Backup Destination dialog box.

You are returned to the Back Up Database dialog box, and the new backup file or backup device is now listed in the large text box in the **Destination** area.

15. Click **OK**.

The database backup is executed, and the success message appears.

	Microsoft SQL Server Management Studio	×
1	The backup of database 'Juris9999009' completed successfully.	
B)		ОК

16. Click **OK** to close the success message dialog box.

You are returned to the main Microsoft SQL Server Management Studio dialog box. Now you need to backup the other database - JBills.

17. Proceed to Backing Up the JBills Database below.

Backing Up the JBills Database

The procedure for backing up the other Juris system database, JBills, is very similar to the procedure used for the Juris database. However, instead of defining a backup destination (and file) or backup device, the JBills database backup should be added to the destination previously created for the Juris database.

1. Right-click the JBills database, and click Tasks / Back Up.

The Back Up Database - JBills dialog box appears.

- 2. In the **Source** area on the right side of the dialog box, verify that the **JBills** database is selected from the **Database** drop-down list.
- 3. From the Backup type drop-down list, verify that Full is selected.
- 4. Verify that **Backup component** is set to **Database**.
- 5. In the **Destination** area (lower portion of the right side of the dialog box), click the destination previously defined when creating the Juris database backup.

This action adds the JBills database backup to the same backup file as the Juris database backup.

6. Click OK.

The database backup is executed, and the success message appears.

Microsoft SQL Server Management Studio	X
The backup of database 'JBills9999009' completed successfully.	
	ОК

7. Click **OK** to close the success message dialog box.

You are returned to the main Microsoft SQL Server Management Studio dialog box, and the entire database backup process is complete.

8. Proceed to Verifying Backup File Contents below.

Verifying Backup File Contents

Once you have backed up both the Juris and JBills databases, it is recommended that you view the contents of the backup file to verify that both databases are listed.

1. On the Databases node, right-click either of the two databases (Juris or JBills), and click Tasks / Back Up.

The Back Up Database dialog box appears.

- 2. In the **Destination** area, verify that the destination used for the Juris and JBills database backup is selected (highlighted).
- 3. Click the **Contents** button.

The Device Contents dialog box appears.

Media s	Media sequence:			Media 1, Family 1						
Created	on:		1	11/6/2014 11:12:57 AM						
Media set -										
Name: Descript Media fa	ion: amily count:		1							
Backup sets Name	: Type	Com	Server	Database	Positi	Start	Finis	First	Las	
Backup sets Name JBills.	: Type Data	Com Full	Server 201	Database Juris9999009	Positi 1	Start 11/6	Finis 11/6	First 346	Las 34(
Backup sets Name JBills JBills	Type Data Data	Com Full Full	Server 201 201	Database Juris9999009 JBills9999009	Positi 1 2	Start 11/6 11/6	Finis 11/6 11/6	First 346 330	Las 34(33(

- 4. Verify that both the Juris and JBills databases appear in the Database column, as shown above.
- 5. Click **Close** to return to the Back Up Database dialog box.
- 6. Click Cancel.
- 7. Close Microsoft SQL Server Management Studio.

Creating a New SQL Server Backup Device

When creating a backup using SQL Server Management Studio, you can choose different devices on which to store the backup. Devices allow you to predefine the backup location and file name, instead of doing so when actually creating the backup. In short, they simplify the overall backup process. However, before you can choose a device during the database backup process, you need to create the device, as described below.

- 1. Verify that you are logged into the computer that is running SQL Server, and that you are the administrator or a user with administrative privileges.
- 2. Open SQL Server Management Studio using one of the following methods, based on your operating system:
 - Windows Server 2008: Click Start, click All Programs, click Microsoft SQL Server, and click SQL Server Management Studio.
 - Windows 8 / Server 2012: Search for SQL Server, and click SQL Server Management Studio in the search results.
- 3. On the Connect to Server dialog box, specify your credentials and click **Connect**.

The Microsoft SQL Server Management Studio dialog box appears.



4. On the left side of the dialog box, click the + icon adjacent to the **Server Object** node.

Several additional options appear.



5. Right-click the **Backup Devices** node, and click **New Backup Device** from the menu that appears.

The Backup Device dialog box appears.

U		Back	up Device				_ □	x	
Select a page	Script 👻 📑 Help								
	Device name:								
	Destination								
	O Tape: File:							~	
			C:\Program Files\Microsoft SQL Server\MSSQL12				MSSQLSI		
Connection									
Server: 2012R2STD									
Connection: 2012R2STD\Administrator									
View connection properties									
Progress									
Ready									
					[ОК	Cano	el	

- 6. In the **Device name** text box, enter a descriptive name for the new backup device (for example: JurisBackupDevice). This name will appear on the SQL Server Management Studio dialog box.
- 7. In the **Destination** area, specify the location for the backup device, if desired.

Note

If you simply want to accept the default file destination and file name (which is the same as the device name specified above), proceed directly to step 8 below.

- a. Click the ... button adjacent to the File text box.
- b. Navigate to folder where the backup device's file will be stored, and click the folder to select it.
- c. In the File name text box, specify a name for the actual backup file created when this device is

used.

d. Click OK.

You are returned to the Backup Device dialog box, and the new file information appears in the **File** text box.

8. Click OK.

The device is created. It now appears in the Backup Device node.



When making a backup, you can now select the newly created device to easily specify your backup's location and file name. For more information on exactly where the device is selected during the backup process, see one of the following topics:

- Backing Up Your Databases Using SQL Server 2008 / 2012
- Backing Up Your Databases Using SQL Server 2014

Migrating Your Database

If you are migrating your backed-up or newly constructed database either to a new database server or a new version of SQL Server, there are several steps that must be performed to ensure that your Juris database will function correctly.

Warning

It is highly recommended that you complete this procedure with the help of Juris Support. Instructions are available that will assist you with the process, but working directly with Juris Support during the migration is recommended.

The basic process for database migration is described below.

- 1. Use Microsoft SQL Server Management Studio or the Juris Management Console. For complete information on the migration process, including detailed instructions, contact Juris Support.
- 2. Once the database is migrated, run the Database Revision Update tool, as described in Updating Your Database. This step verifies that your database is fully upgraded for the current version of Juris.

Updating Your Database

If you are migrating your database or creating a brand new Juris database, you need to execute the Database Revision Update tool before using Juris.

- 1. Verify that you are logged into the computer that will run the Juris server, and that you are the administrator or a user with administrative privileges.
- 2. Start the Database Revision Update tool. Use one of the following methods:
 - Click Start, click All Programs, click Juris, click Administrative Tools, and click Database Revision Update.
 - Search for Juris, and then click **Database Revision Update** in the search results.

The tool opens.



- 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, see Backing Up Your Juris Databases.

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

Uninstalling Juris

Use the Conrol Panel feature of the Windows operating system to remove Juris from your computer.

Note

It is not necessary to uninstall Juris before upgrading to a new version. For more information, see: About Upgrading Versus New Installations

- 1. On the system where Juris is installed, open the Control Panel.
 - Click Start, and click Control Panel.
 - There are other way to open the Control Panel. For more information, refer to the following website:

http://technet.microsoft.com/en-us/library/hh831491.aspx#BKMK_ctrlpanel

2. In the **Programs** group, click **Uninstall a program**.

The **Programs and Features** tool opens. Installed programs are listed under **Uninstall or change a program**.

- 3. Click one of the following entries (all items may not be present on your computer, based on what was originally installed):
 - Juris Administrative Tools
 - Juris Application
 - Juris Server

The entry is highlighted.

4. Click the Uninstall button, which appears at the top of the list.

The application is removed.

- 5. Repeat steps 3 and 4 for all existing Juris entries.
- 6. Close the Programs and Features.
- 7. Use Windows Explorer to delete the folder that contained the Juris installation.

Note

In most cases, this folder the **Juris** folder is located in the **\Program Files** folder (**\Program Files (x86)** if you are using a 64-bit system).