Juris® from LexisNexis®

JurisSuite Citrix® Installation Guide

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Introduction

Welcome to the JurisSuite upgrade guide. This document is for firms upgrading to the latest version of JurisSuite. This is for upgrades from MyJuris 1.1 and all versions of JurisSuite. If you are performing a new installation of JurisSuite and do not have a previous version then follow the new install guide available on the Juris Support Center.

Upgrading Summary

Upgrades from *MyJuris* 1.1 and JurisSuite Pre-2405

- Download installation files via the support site, http://support.lexisnexis.com/Juris/
- Uninstall all *MyJuris* and JurisSuite Components from Server
- Install and Configure JurisSuite Components on the server
- Deploy Updates
- Uninstall all *MyJuris* and JurisSuite Components from the Client
- Install JurisSuite Client

Upgrades from 2405 and above versions of JurisSuite

- Download Updates using Deployment Manager
- Uninstall JurisSuite Server
- Install Downloaded JurisSuite Server
- Deploy Updates
- Ensure JurisSuite Client is upgrading automatically

Planning and Preparation

System Requirements

Juris System Requirements can also be viewed at the **LexisNexis Support Center** by clicking on Juris System Requirements. The below requirements specifically focus on the JurisSuite program.

Server Required Pre-Install Items

- ❑ Juris version 2.4 must be installed and configured prior to installing JurisSuite 2.4
- ❑ Windows Server 2003 or Windows Server 2008 ** (**Note: Windows Server 2008 requires IIS6.0 Management Compatibility Components. See below for implementation instructions**)
- ❑ SQL Server 2005/2008, SQL Express 2005/2008 (4GB database limit) **Note: SQL 2008 and SQL Express 2008 are supported only with version 2.4**
- ❑ .NET 2.0 Framework Installed
- ❑ IIS Installed *** (If 64bit O/S follow **Servers Running a 64 Bit O/S** below)
- ❑ 2GB of Available Local Hard Drive space
  - 540MB for Installation
  - 570MB for Staging Information
  - 700MB of available for deployment
- ❑ JurisSuite installer must have administrative privileges.
- ❑ An Outside IP address is required for WebConnect setup.

Servers Running a 64 Bit O/S

JurisSuite can only be run in a 32 bit environment. To adjust a 64 bit Windows Server O/S to properly run JurisSuite, follow these directions. Note: We highly recommend you engage the services of a qualified network technician to implement the changes below.

Switch ASP.NET to run in 32 bit mode – Reference Microsoft KB Article 894435

1. Click Start>Run, type cmd, and then click OK.
2. Type the following command to enable the 32-bit mode:
   cscript %SYSTEMDRIVE%\inetpub\adminscripts\adsutil.vbs SET W3SVC/AppPools/Enable32bitAppOnWin64 1
3. Click OK
4. Click Start>Run, type cmd, and then click OK.
5. Type the following command to install the version of ASP.NET 2.0 (32-bit) and to install the script maps at the IIS root and under:
   %SYSTEMROOT%\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe –i
6. Click OK
7. Make sure that the status of ASP.NET version 2.0.50727 (32-bit) is set to Allowed in the Web service extension list in Internet Information Services Manager.

Switch WebDAV to the 32 bit version and disable the 64 bit version

8. Click Start> Settings> Control Panel > Administrative Tools> Internet Information Services
9. Expand Web Server Extensions
10. Click “Add a New Web service extension...”
11. Name the Extension “WebDAV32”
12. Click Add for the required files and browse to C:\WINDOWS\SysWOW64\inetsrv\httpext.dll.
13. Check “Set Extension status to Allowed”
14. Click OK
15. Highlight WebDAV (the 64 bit version) and prohibit the extension.

Windows Server 2008

Before installing JurisSuite server, IIS 6.0 Management Compatibility Components must be installed. Failure to do so will result in the server installation rolling back.

To install the IIS 6.0 Management Compatibility Components by using the Windows Server 2008 Server Manager :

1. Click **Start** > **Administrative Tools** > **Server Manager**.
2. In the left navigation pane, expand **Roles**, right-click **Web Server (IIS),** and select **Add Role Services**.
3. On the **Select Role Services** pane, scroll down to **IIS 6 Management Compatibility**.
4. Select the check boxes for **IIS 6 Metabase Compatibility** and **IIS 6 Management Console**.
5. Click **Next** from the **Select Role Services** pane, and click **Install** at the **Confirm Installations Selections** pane.
6. Click **Close** to leave the Add Role Services wizard.

Recommended Configurations

Changes based on user count – All other minimum requirements still apply.

- 1-20 Users
  - Single/Dual Xeon Processor
  - Windows Server 2003 R2 **
  - MS SQL Server 2005/2008 **
  - 2GB RAM or higher*
- 21-50 Users
  - Dual Xeon Processor
  - Windows Server 2003 R2**
  - MS SQL Server 2005/2008 **
  - 3GB RAM or higher**
- 51+ Users
  - Quad Xeon Processor
  - Windows Server 2003 R2
  - MS SQL Server 2005/2008**
  - 4GB RAM or higher**

Additional Information

* The database server computer should be equipped with minimum 2GB of RAM plus 32 MB of RAM per active user (the estimated number of users concurrently accessing the server at any one time). Inadequate memory for the number of concurrently accessing users will reduce performance.

** Vista and Windows 7 is NOT supported as a server for Juris products. Windows Server 2008 and Juris 2.35 SP1 are supported with known issues. Before upgrading to Windows Server 2008, please read the compatibility document found at http://support.lexisnexis.com/Juris/. All operating systems and SQL instances should be updated to the current releases of service packs and updates marked critical. A competent network engineer should be available to help troubleshoot any issues that arise. Windows Server 2008 platform requires specific IIS settings that must be done prior to installation. These instructions are found on page 16 of this document.

*** If you are using Windows Server 2003, WebDAV, ASP.NET, and Active Server Pages must to be installed and allowed in IIS Web Service Extensions.

Workstation Required Pre-Install Items

- ❑ Juris 2.4 Application or License Manager must be installed
- ❑ .NET 2.0 Framework
- ❑ User has local administrative rights *****

Recommended Configuration for Workstations

- ❑ Intel Duo Core processor (Or AMD equivalent)
- ❑ Display Resolution set at 1280x1024 with Normal 96dpi.
- ❑ XP Professional, Vista Business or Ultimate, Windows 7 Professional or Ultimate ******.
- ❑ 2GB RAM (Normal Users) or 3GB RAM (Power Users)

Note: A power user is considered someone who uses both Juris and JurisSuite along with other products (like Outlook, Word, Excel, Adobe Acrobat Reader etc.) all at the same time.

Additional Information

*If Local Administrative rights cannot be given, please follow the Limited-Rights Environment document located on our Support Center website.

**JurisSuite is not supported on Vista Home Edition or Windows 7 Home Premium. If you are using Vista Business/Ultimate, or Windows 7 Professional/Ultimate, you must have User Account Control disabled installing the JurisSuite Client.

Citrix/Terminal Server Environments

- Juris supports operation on Citrix® MetaFrame® and Windows Terminal Server. Setup and configuration are not supported by Juris and should be completed by a qualified Systems Administrator. In such environments, the Juris database must reside on a separate server from that used for Citrix or Terminal Server.
- JurisSuite is not available as Thin Client software. JurisSuite operations in these environments require large amounts of RAM and sometimes multiple server configurations performing load balancing.

Juris Database Backup

After the checklist for hardware and software requirements has been met, it is best practice to ***backup*** using the Juris Management Console. Documentation on Juris Management Console Backup is located on our Support Center website.

Juris Support Contact Information

By Phone: 877-377-3740

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

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

Upgrades from *MyJuris* 1.1 and JurisSuite Pre-2405

Server

Download the Installation Files

1. Using a web browser, navigate to the http://support.lexisnexis.com/Juris/
2. Click on Juris and JurisSuite under Downloads and Utilities.
3. Click the JurisSuite downloads link.
4. Follow instructions on the site to save the installation files to a **shared location**.

Uninstall Previous MyJuris and JurisSuite Components

1. Open Add/Remove Programs by going to **Start>Control Panel> Add/Remove Programs.**
2. Locate and uninstall the following programs from the server (depending on what version is currently installed, you may not see all of the items listed below):
    - Deployment Manager
    - Deployment Manager Web Service
    - JurisSuite Client
    - JurisSuite Distribution Service
    - JurisSuite Distributed Reports
    - JurisSuite Server
    - MyJuris
    - *MyJuris* Web Service
3. Open IIS Manager by going to **Start> Programs> Administrative Tools> Internet Information Services**
4. Under **Default Web Site** right click and delete any of the following sites
    - JurisSuite Updater
    - Juris Dashboard Server
    - Juris Distributed Reports
    - Juris WebConnect
    - JurisSuite WebConnect
    - MyJuris Deployment
5. Open Services by going to **Start> Programs> Administrative Tools> Services**
6. Make sure the following Services were removed:
    - Juris Alert Service
    - Juris Distribution Service

If the services above are still loaded, perform the following steps to remove the service.

- Right click the service and go to **properties**.
- Write down the **exact service name** on the General tab.
- Click the **Stop** button if the service is running.
- Open a command prompt by going to **Start>Run** and typing **cmd** and click **OK**.

Type the following command at the prompt. **SC DELETE <ServiceName>** Where **<ServiceName>** is the **exact service name** you obtained from the **General Tab** above.

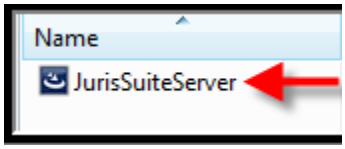
- Press **Enter** and then check Services again for that service. If it's still listed, a reboot may be required.

Caution: When deleting folders, be sure to check the contents of the folder prior to deletion. This prevents accidental deletion of files that were improperly stored in the folder.

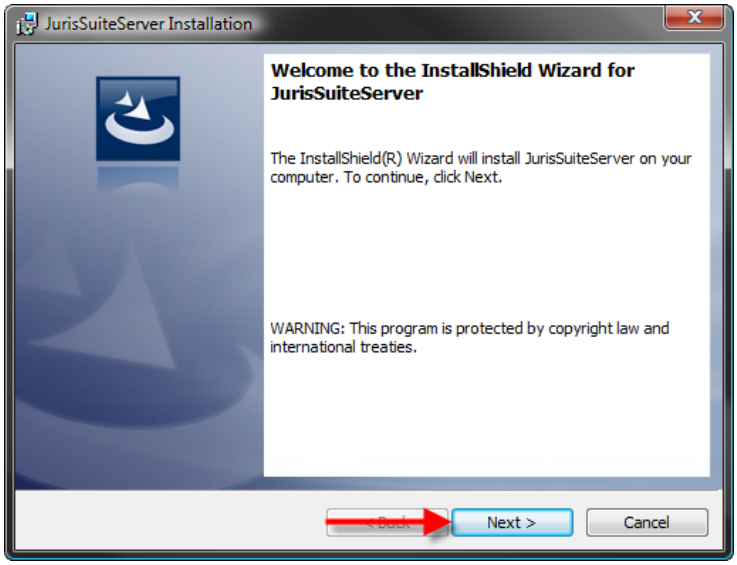
7. Delete the following folders and all subfolders.
   - Program Files\Juris **(Not Juris2)**
   - Program Files\JurisSuite
   - Program Files\Deployment Manager
   - Program Files\JurisSuite Alerting Service
   - Program Files\Distribution Service

Install JurisSuite Server (If using Windows Server 2008, see page 4 for IIS6.0 Compatibility Component Installation before proceeding)

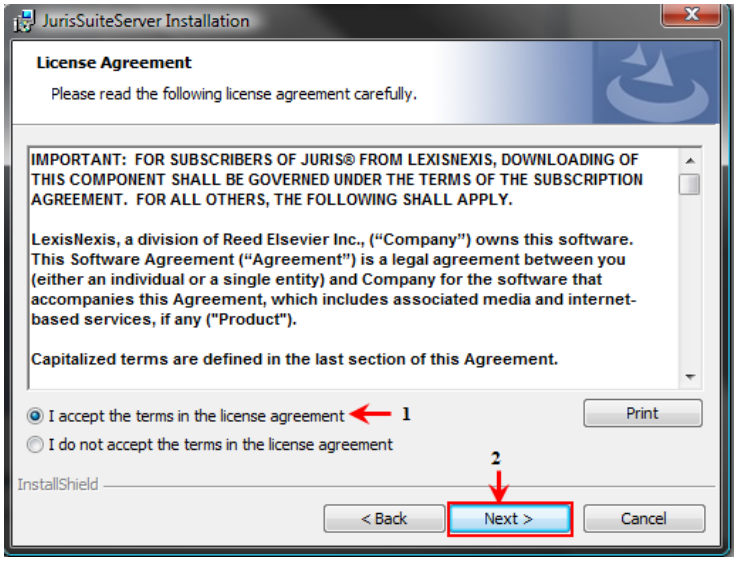
1. Locate the extracted installation files and double click on the **JurisSuiteServer.exe** file to begin the installation.



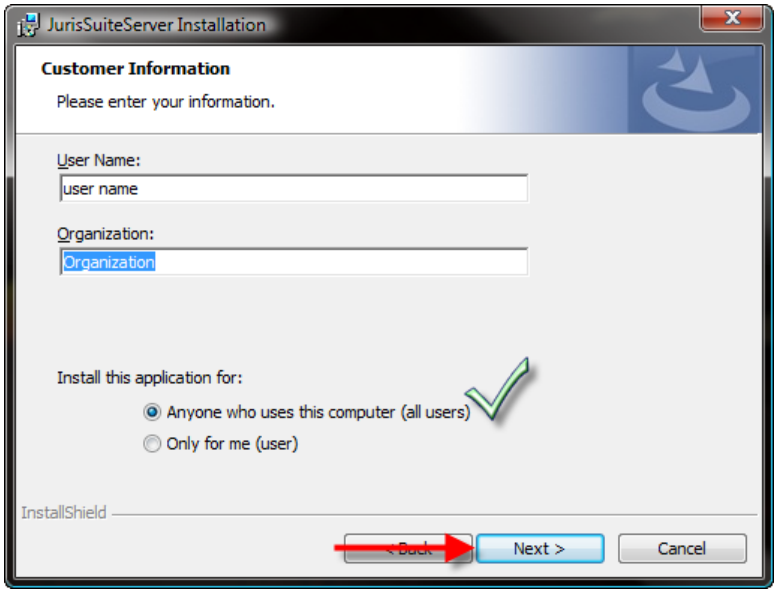
2. Click the ***Next*** button on the **Welcome** installation screen.



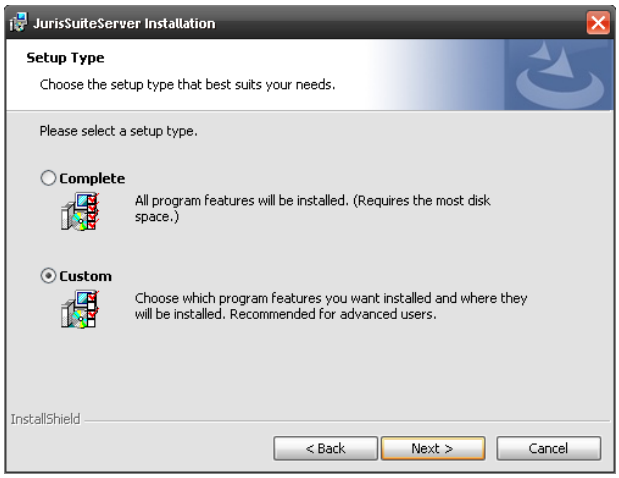
3. Select **"Accept"** on the license agreement window and click the ***Next*** button.



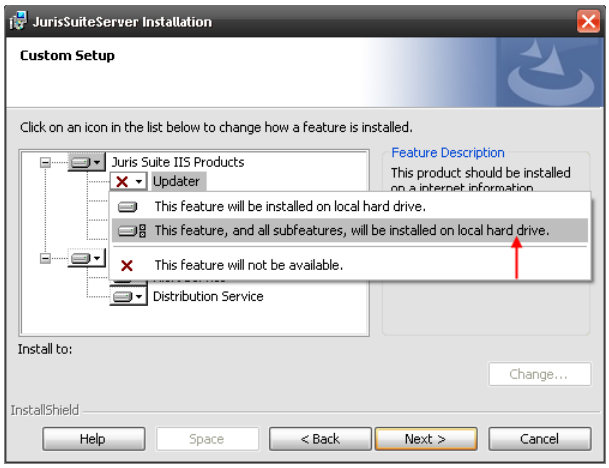
4. Enter the appropriate **Customer Information** and click the ***Next*** button.



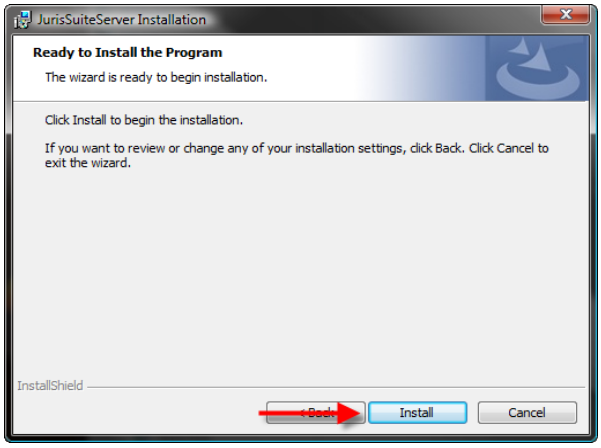
5. On the **Setup Type** window, if JurisSuite is being installed to the Local Disk C: drive, accept the default of ***Complete***, click the ***Next*** button and skip to **step 14**. Otherwise if installing on any drive other than C:\ you should select ***Custom*** and click the ***Next*** button.



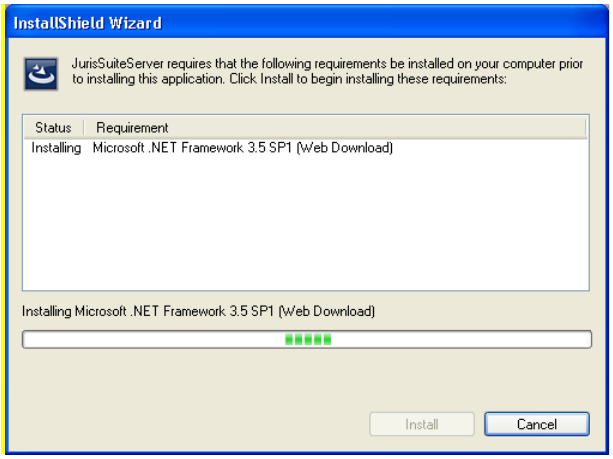
6. From the Custom install screen, you will need to select the ***Updater*** combo box under the JurisSuite IIS Products. Select ***"This feature, and all sub features, will be installed on local hard drive."***



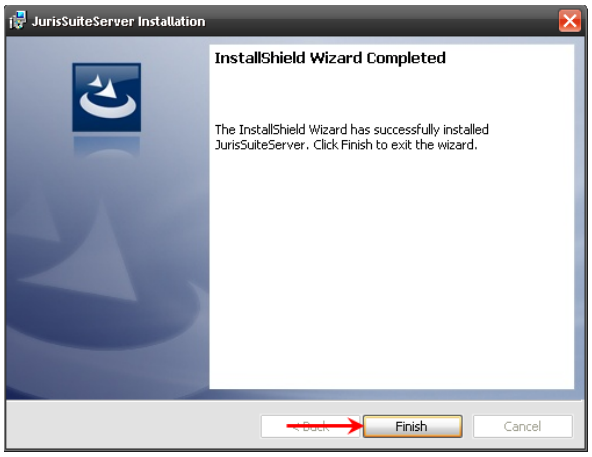
7. Click the ***Install*** button to execute the installation of the server application.



8. If .NET 3.5 SP1 is not already installed, you may be prompted to install it. You may also be required to reboot. Once it is complete, the JurisSuite installation will continue.



9. Click the *Finish* button on the final window.

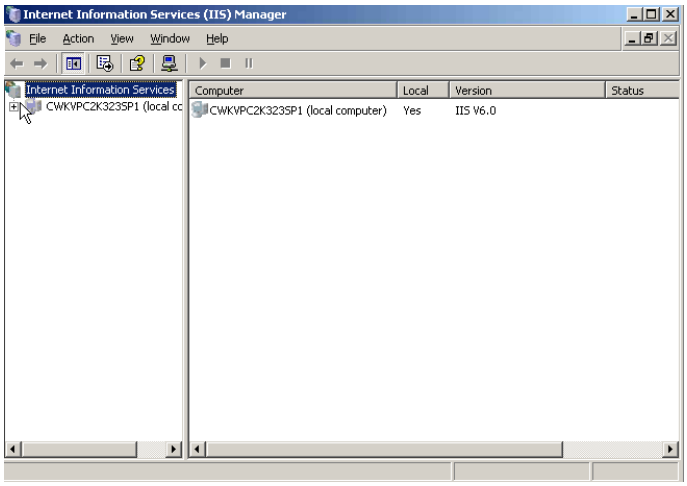


Configuration of IIS Server 2003

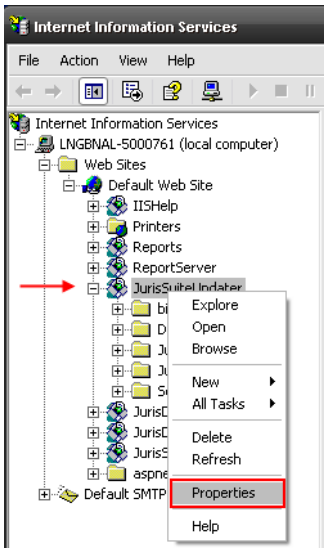
To configure IIS properly for JurisSuite, perform the following:

1. Start the **IIS** management console. This can be accessed from within the **Administrative Tools**. **Start > All Programs > Administrative Tools > Internet Information Services Manager**

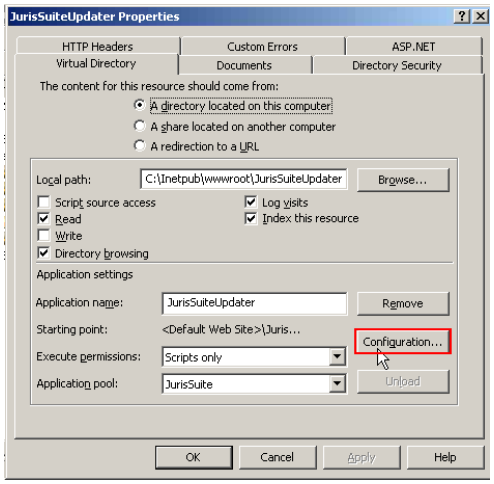
2. Expand the server in the left hand pane.



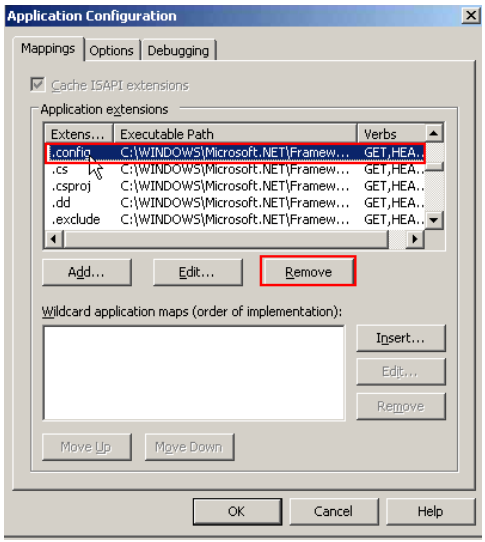
3. Expand the web sites. Right click on the **JurisSuite Updater** and select **Properties**.



4. On the **Virtual Directory** tab, click the ***Configuration*** button.

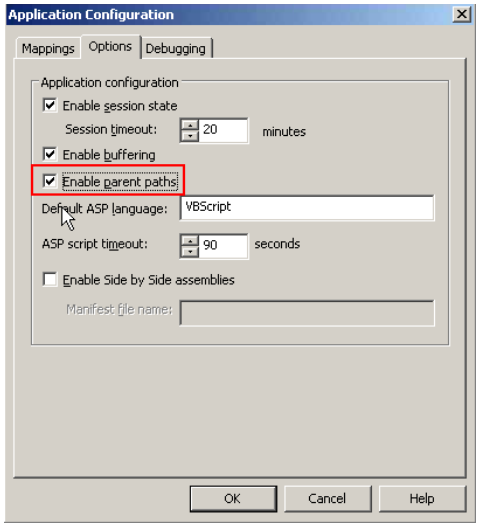


5. Select .config extension, and click the ***Remove*** button.



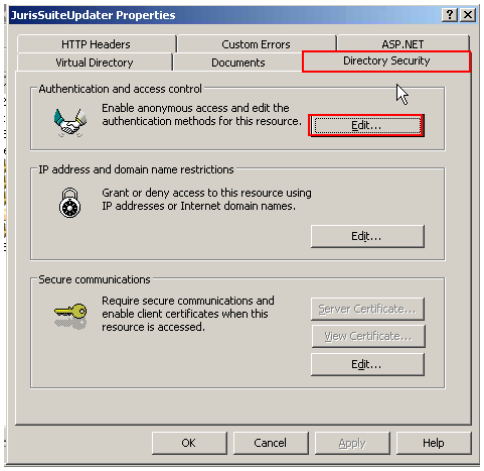
6. Click the ***Yes*** button to confirm removal of the extension.

7. Click the **Options** tab, and place a check in the **Enable parent paths** box.

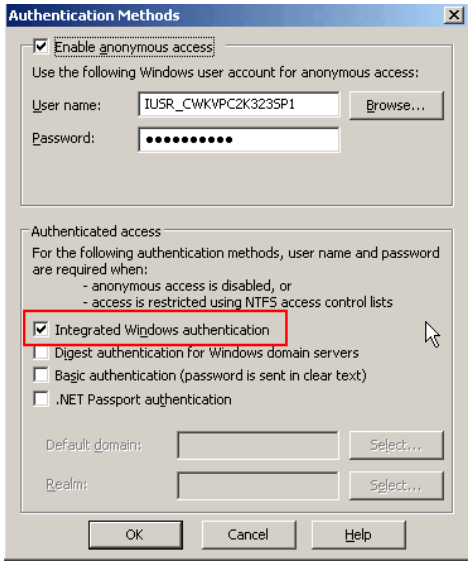


8. Click the **OK** button.

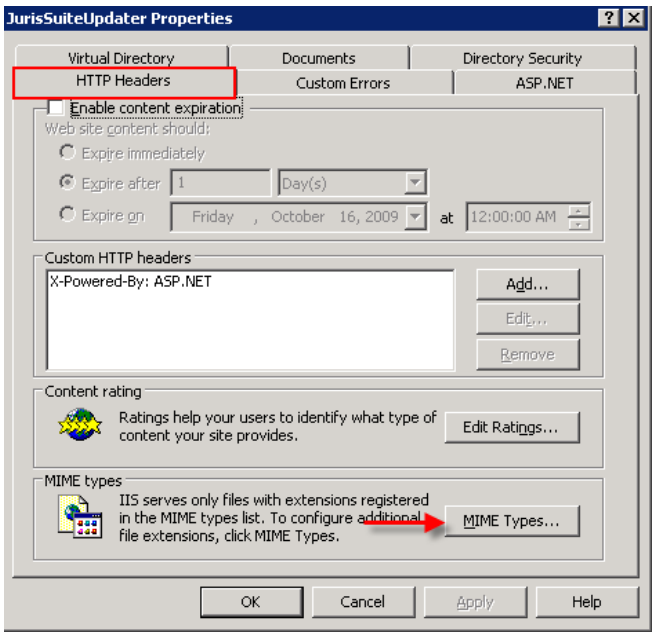
9. Click the **Directory Security** tab, and click the ***Edit*** button under Authentication and access control.



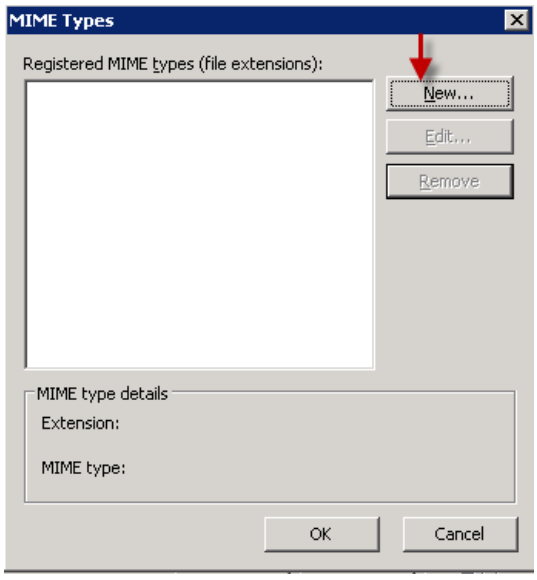
10. Place a checkmark next to the **Integrated Windows Authentication** if no checkmark exists. Click the ***OK*** button.



11. Select the **HTTP Headers** tab. Click the ***MIME Types*** button in the **MIME types** section.

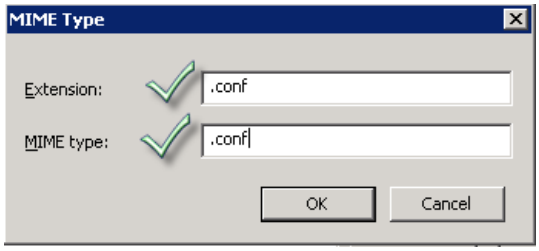


12. Click the ***New…*** button in the **MIME Types** window.

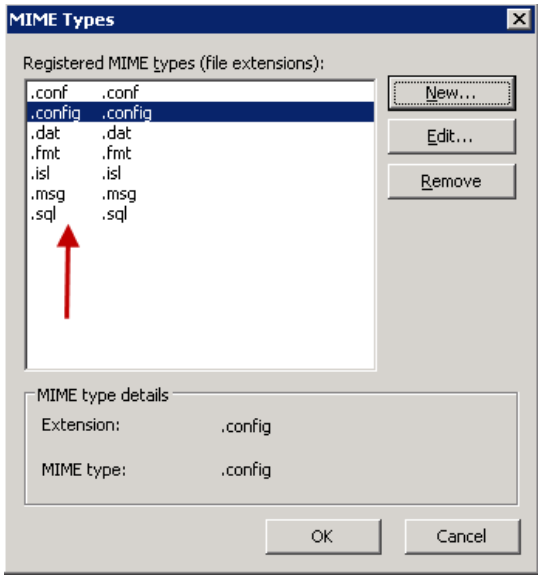


13. Enter each of the following types into the ***Extension*** and ***MIME type*** fields. Be sure to add the period before each extension. Click the ***OK*** button. Repeat the ***steps 27 and 28*** until all the types are added.

- **.conf**
- **.dat**
- **.fmt**
- **.isl**
- **.msg**
- **.sql**
- **.config**



14. When you have completed, the window should look like the figure below. Click the ***OK*** button when complete.

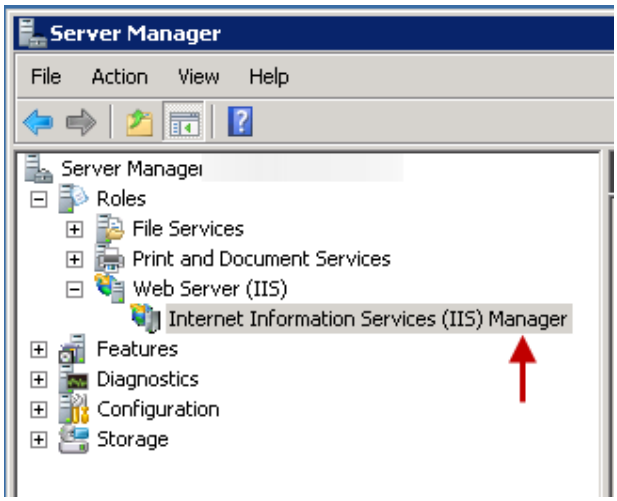


15. Click the ***OK*** button on the **JurisSuite Updater** window. Close the **Internet Information Services** window.

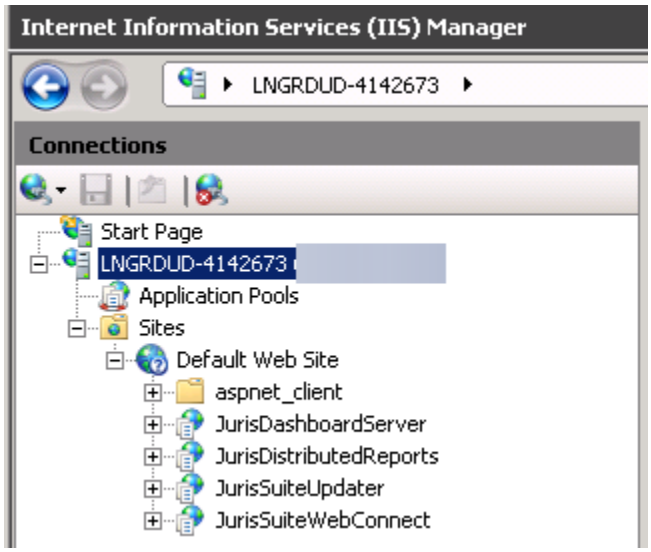
Configuration of IIS7/Windows Server 2008

The following steps are for Windows Server 2008 IIS7 Setup.

1. Select **Server Manager>Roles>Web Server (IIS)>Internet Information Services (IIS) Manager**.

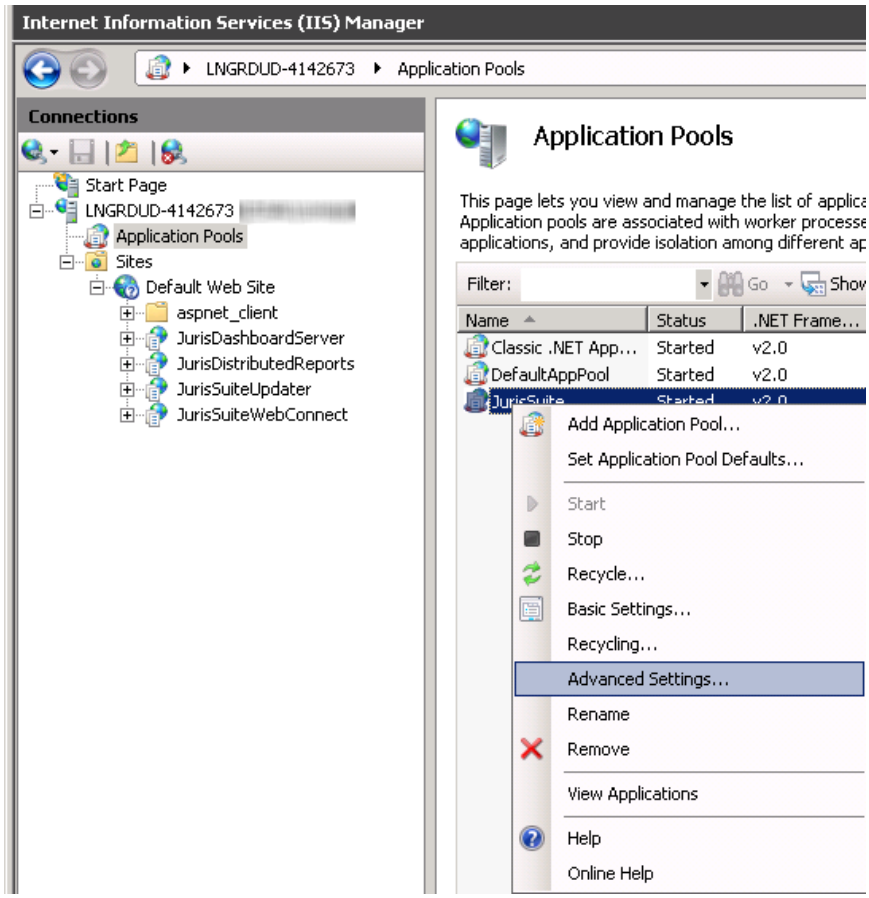


2. Expand the server and sites node.



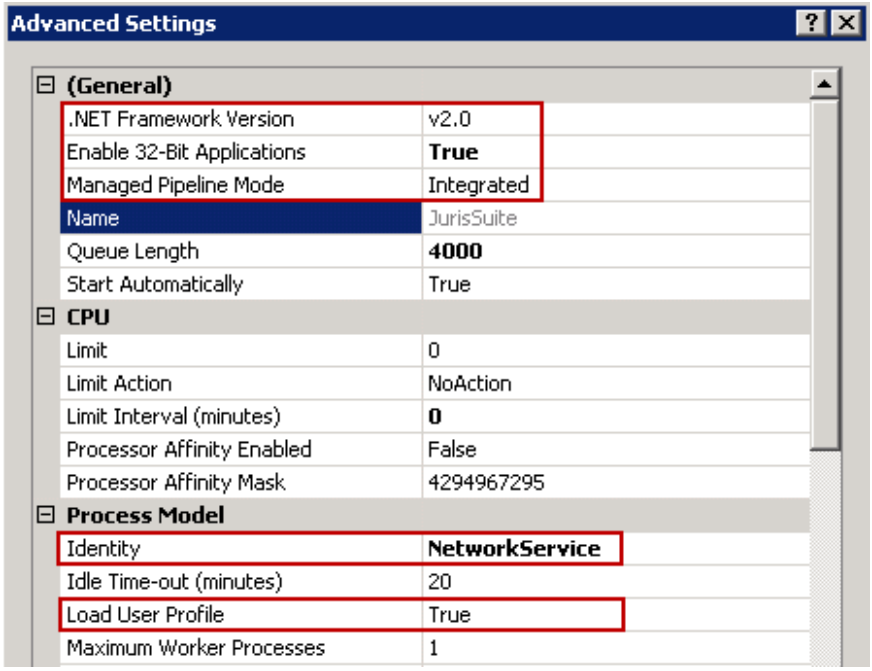
3. Select Application Pools.

4. In the display pane, right click on JurisSuite and select Advanced Settings.

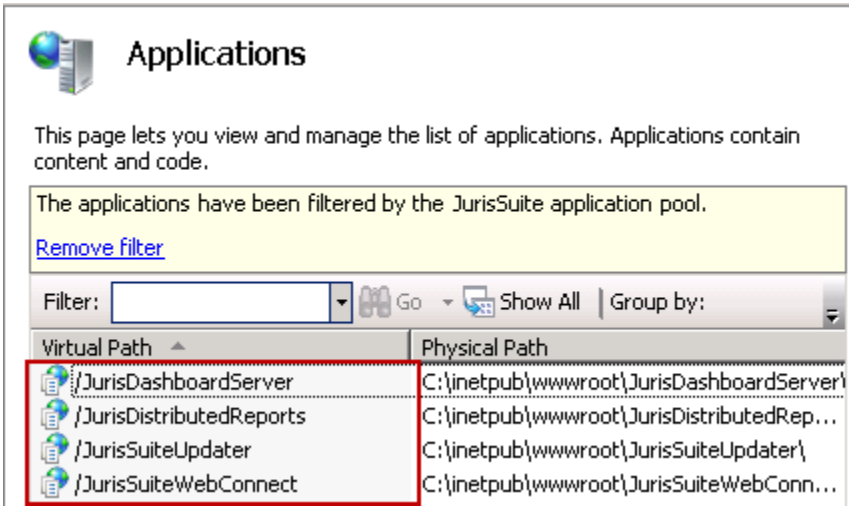


5. Ensure that the following settings are enabled:

- (General) Section
    - .NET Framework Version – v2.0
    - Enable 32-bit Application – True (if you are running 64 bit machine)
    - Managed Pipeline Mode – Integrated
- Process Model Section
    - Identity – Network Service
    - Load User Profile – True

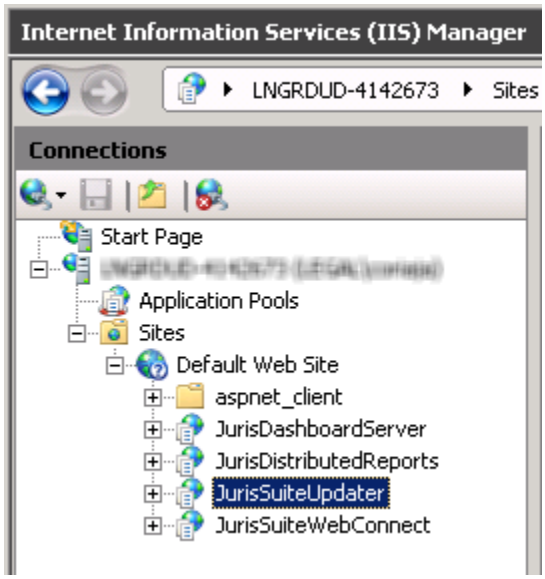


6. Click the ***OK*** button.
7. Right click on JurisSuite and select **View Applications**.
8. Ensure the following Applications are listed:
    - JurisDashboardServer
    - JurisDistributedReports
    - JurisSuiteUpdater
    - JurisSuiteWebConnect



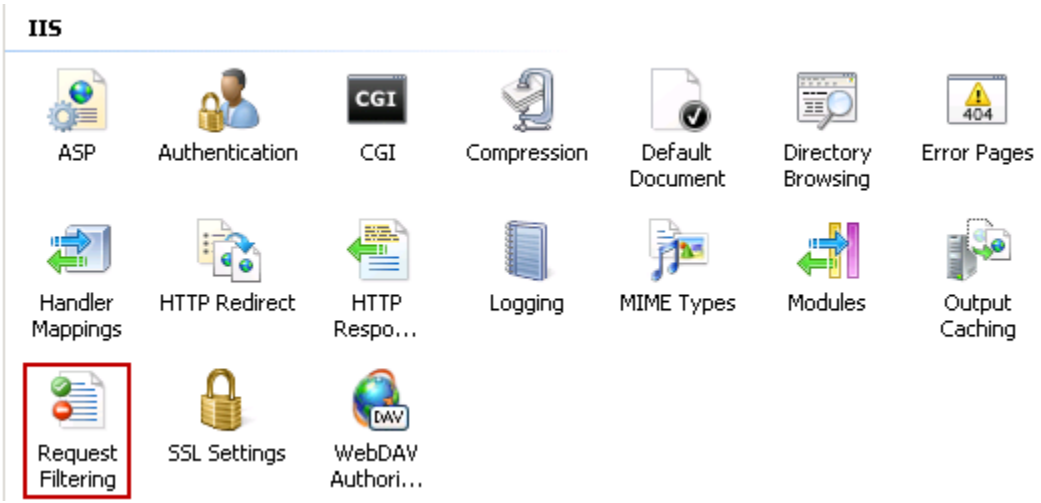
JurisSuiteUpdater Setttings

9. Under **Sites**, select **JurisSuiteUpdater**.

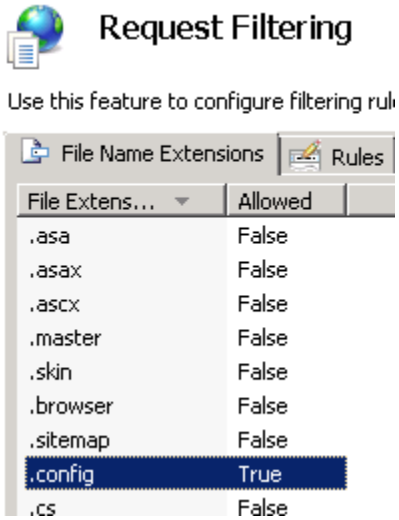


10. In the **IIS** section, double click **Request Filtering**.

Note: In some instances, Request Filtering may not show as below even if it is installed. Please refer to the following article on how to edit the Request Filtering file list via the ApplicationHost.config file.
http://support.microsoft.com/kb/942045/

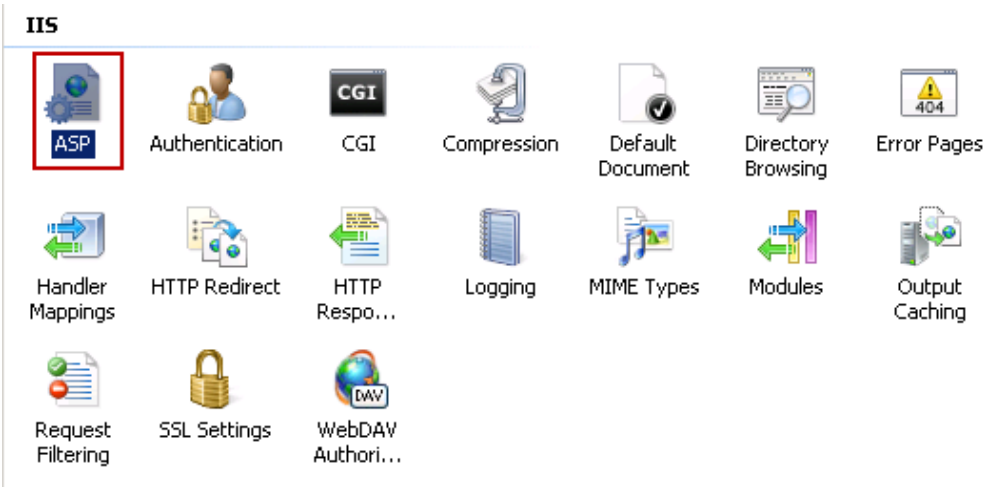


11. Ensure **File Extension** .**config** is set to **'True'**.

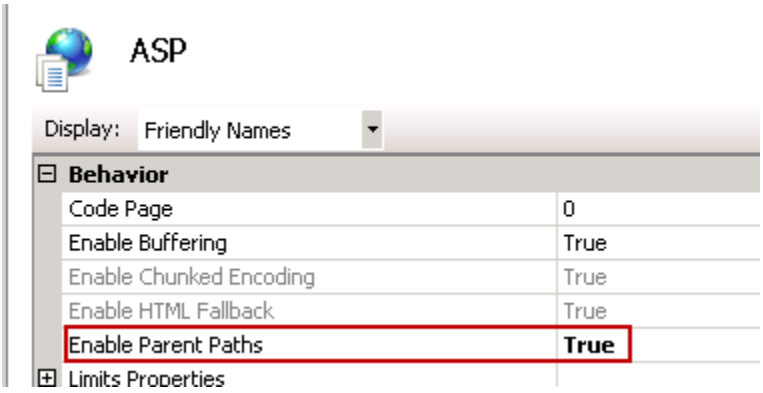


12. Return to the **JurisSuiteUpdate** site. You use the back browser button or simply re-select **JurisSuiteUpdater** under **Sites**.

13. In the **IIS** section, double click **ASP**.

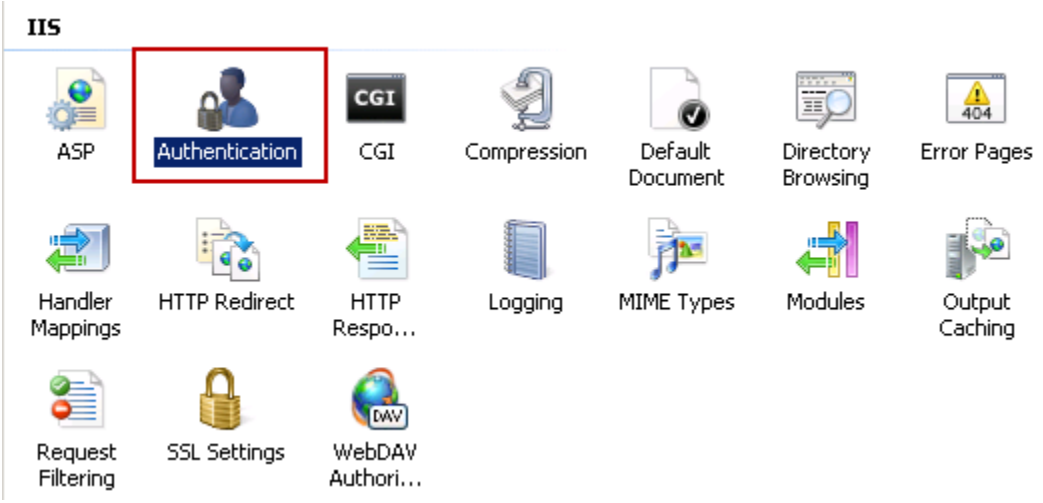


14. Ensure **Enable Parent Paths** is set to '**True**'

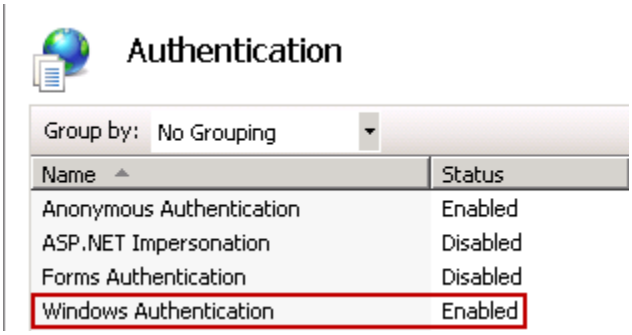


15. Return to the JurisSuiteUpdate site. You use the back browser button or simply re-select JurisSuiteUpdater under **Sites**.

16. In the **IIS** section, double click **Authentication**.

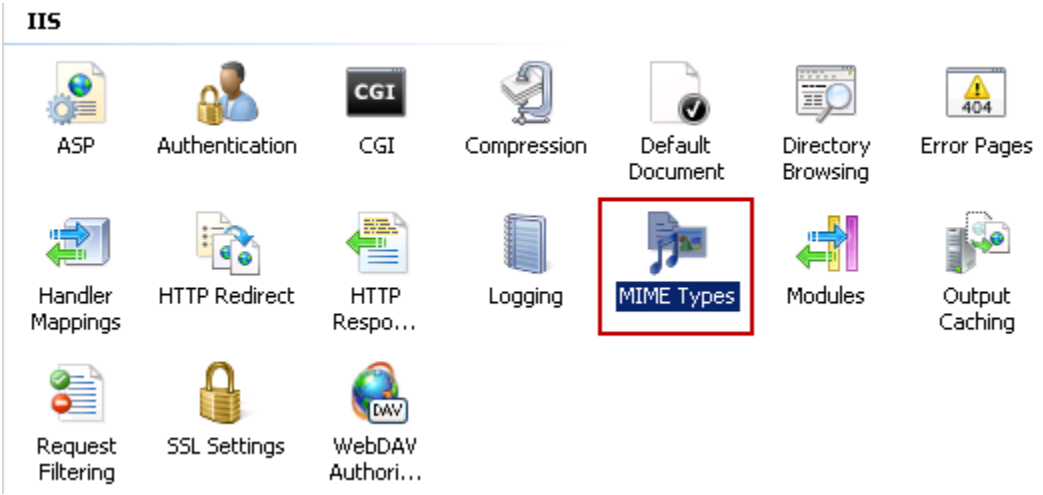


17. Ensure **Windows Authentication** is set to '**True**'

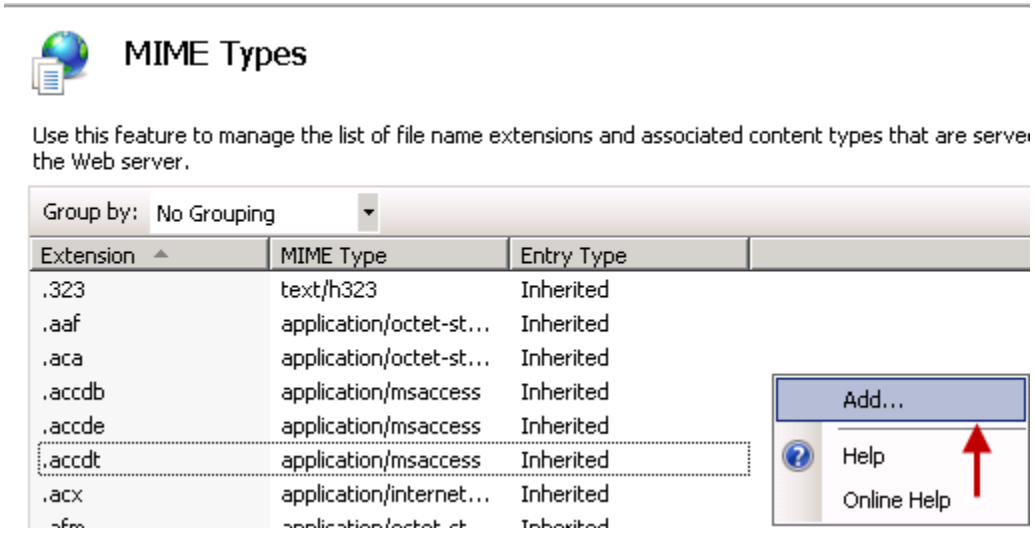


18. Return to the JurisSuiteUpdate site. You use the back browser button or simply re-select JurisSuiteUpdater under **Sites**.

19. In the **IIS** section, double click **MIME Types**.

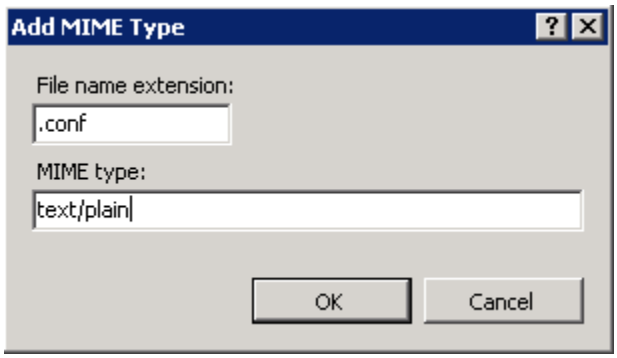


20. Right mouse click in the display pane and select **Add**. You can also use the **Add** link under the **Actions** pane.



21. Add the following types. You will have to add one at a time, entering 'text/plain' as the MIME type.

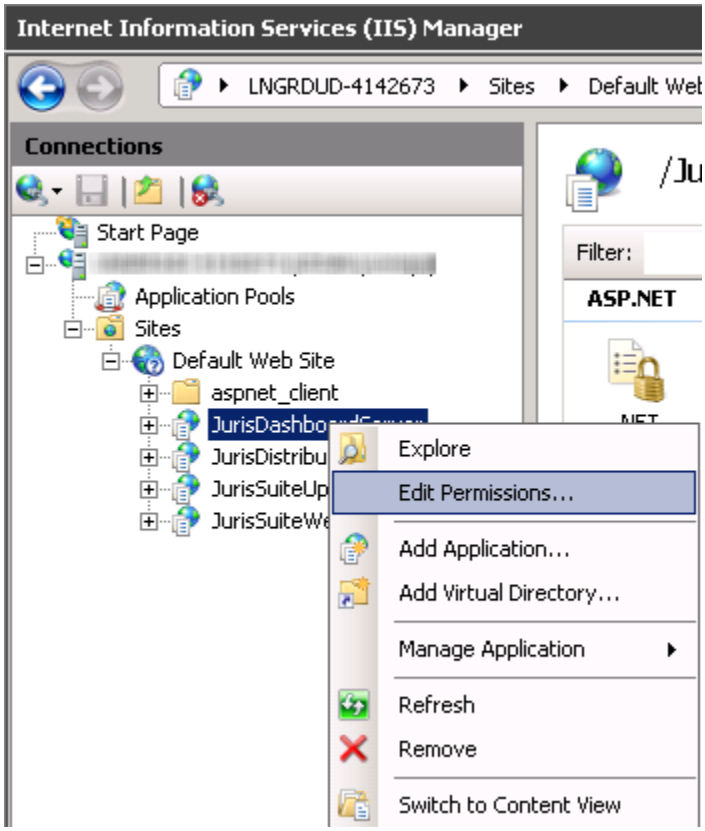
- .conf
- .dat
- .fmt
- .isl
- .msg
- .sql
- .config



Be sure to click the ***OK*** button each time to complete the additions.

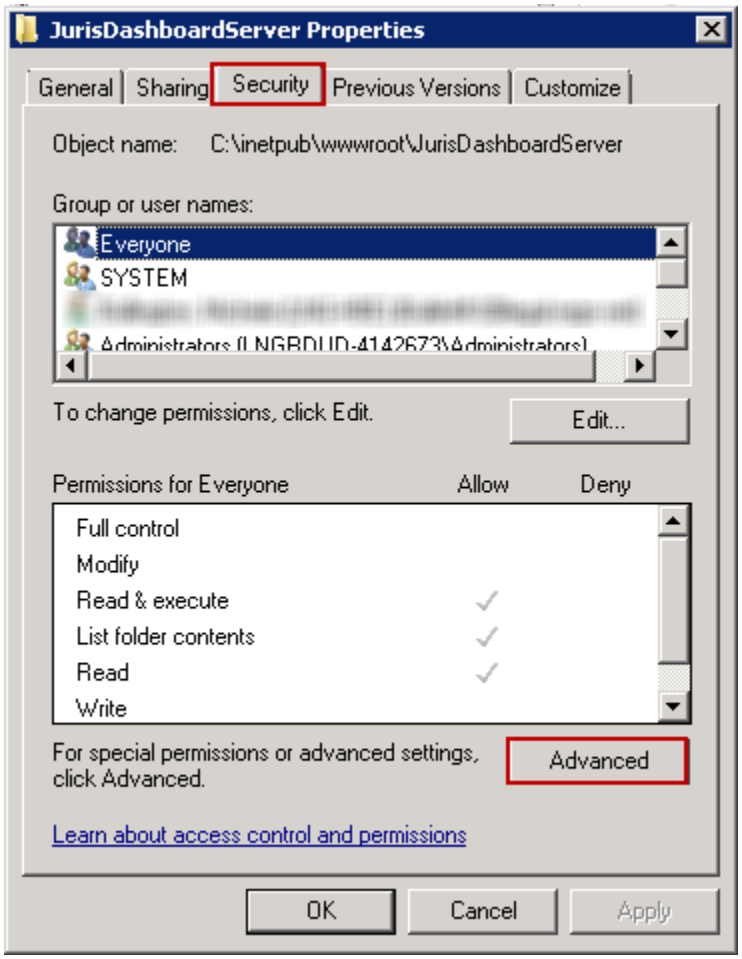
JurisDashboardServer Settings

22. Right click on the JurisDashboardServer and select **Edit Permissions**.

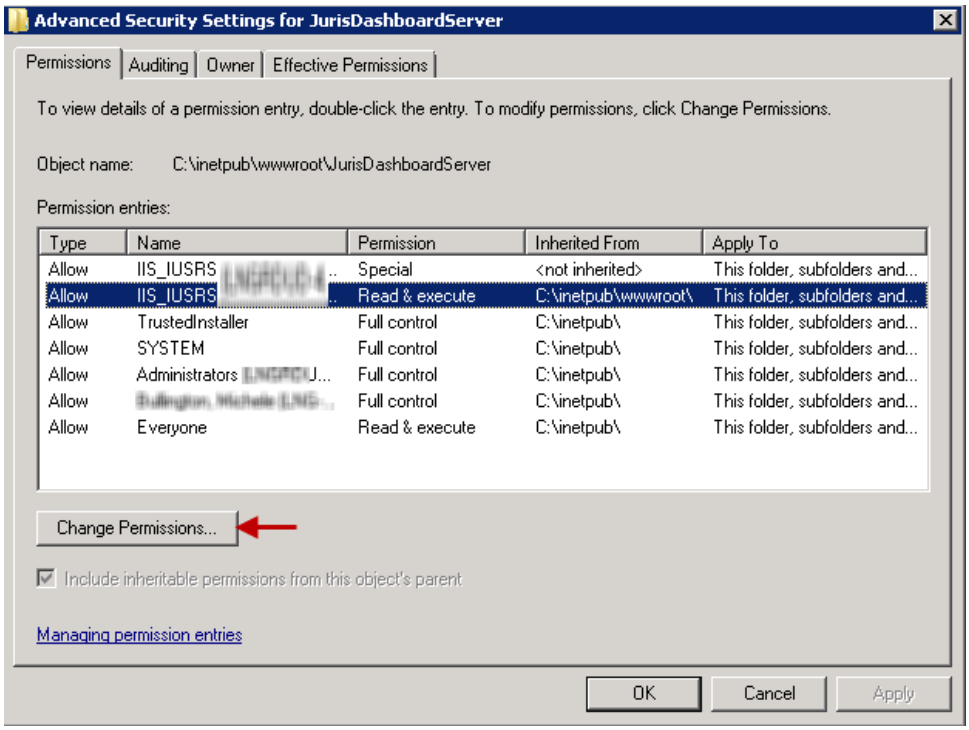


23. Select the **Security Tab**.

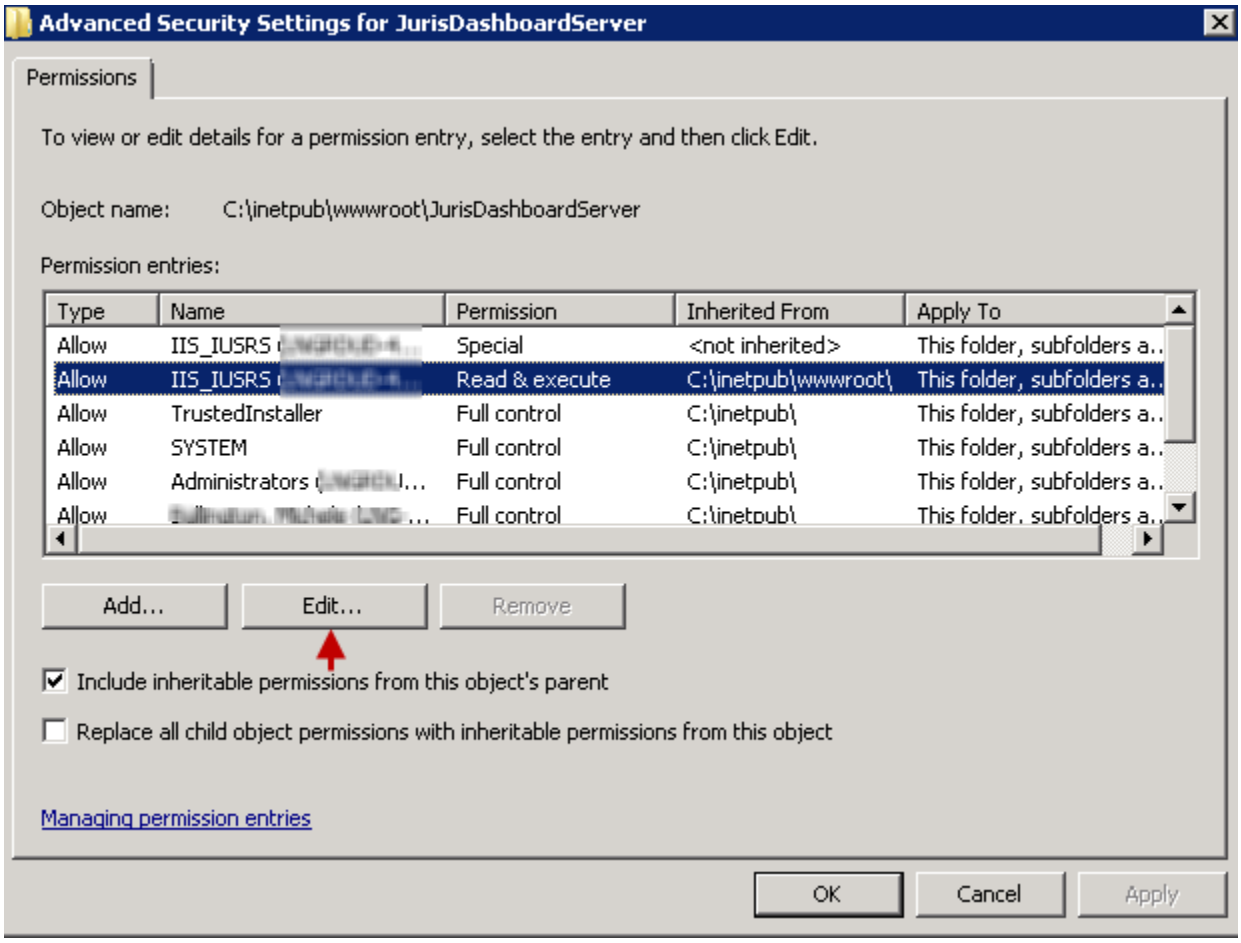
24. Click the ***Advanced*** button.



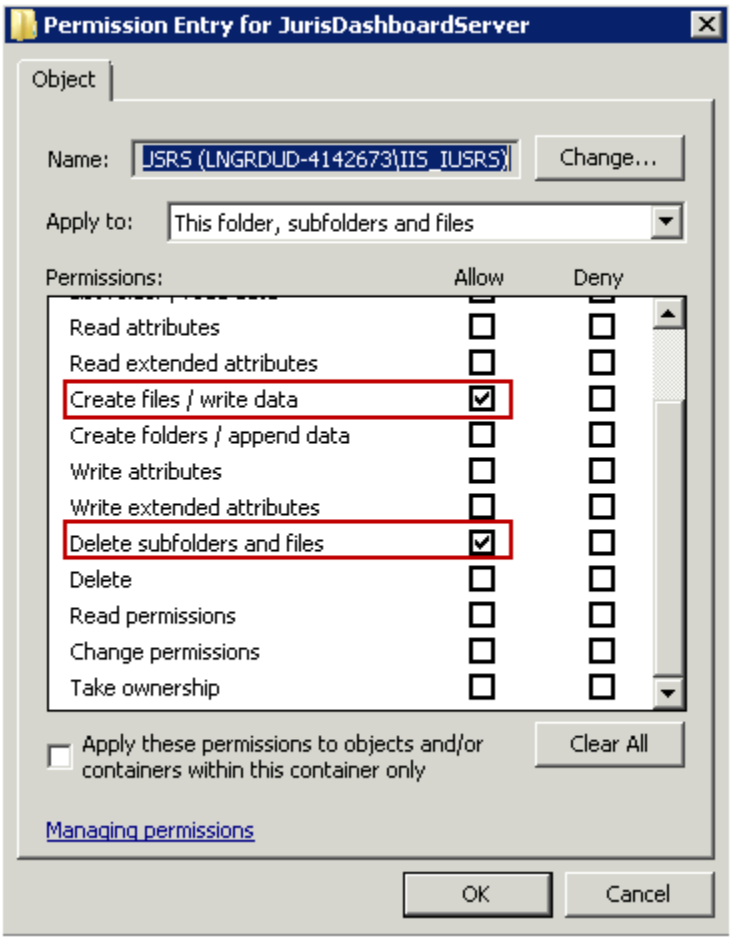
25. Select IIS_IUSRS as indicated below, and click the ***Change Permissions*** button.



26. Select the same IIS_IUSRS entry and click the ***Edit*** button.

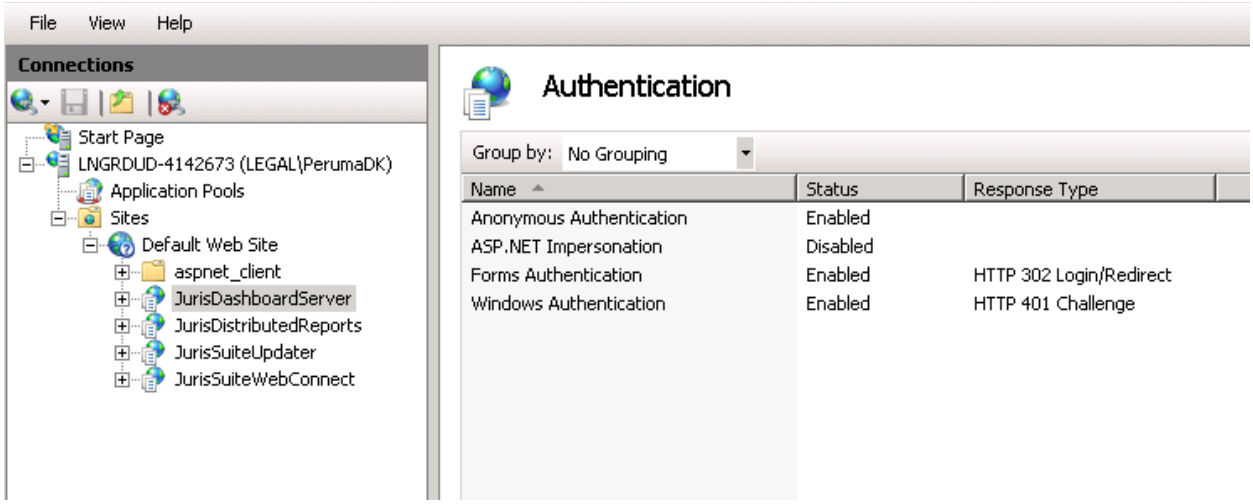


27. Ensure the **Create files / write data** and **Delete subfolders** and files is set to '**Allow'**



28. Click the ***OK*** button. Click the ***OK*** button on each of the open windows.

29. For theJurisDashboardServer, ensure **Anonymous Authentication**, **Forms Authentication** and **Windows Authentication** are enabled.



30. Ensure the C:\inetpub\wwwroot\JurisDashboardServer\" folder has full access to **Network Services**

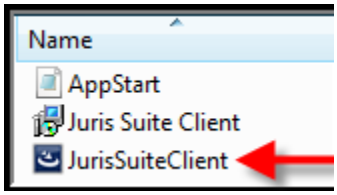
31. Exit IIS Manager.

IIS7 Configuration is completed.

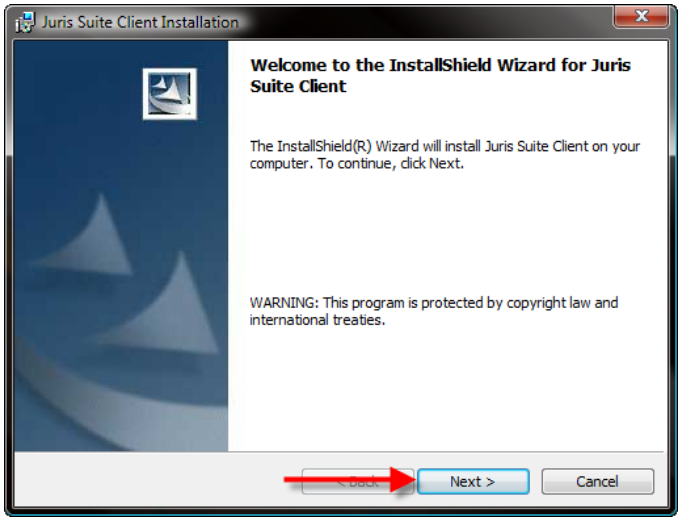
Deployment Manager Installation

Deployment Manager is the key component to upgrading the Juris database and pushing out updates to installed JurisSuite clients on workstations. **It is designed to be installed only on the SQL Server.**

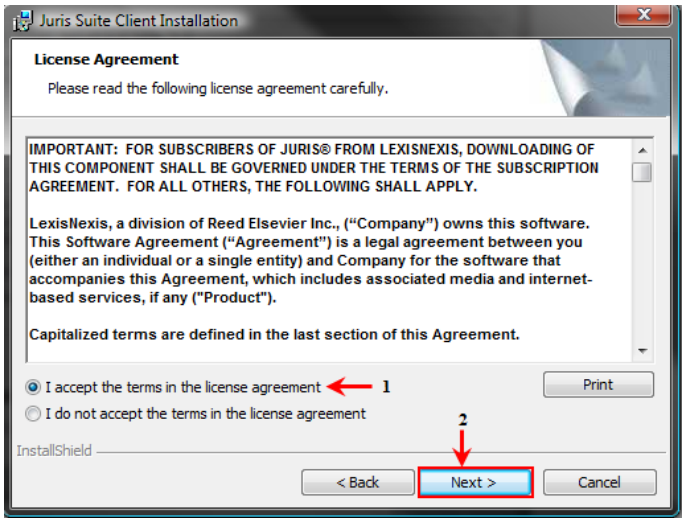
1. Navigate to the extracted JurisSuite installation files and double click the ***JurisSuiteClient.exe*** file.



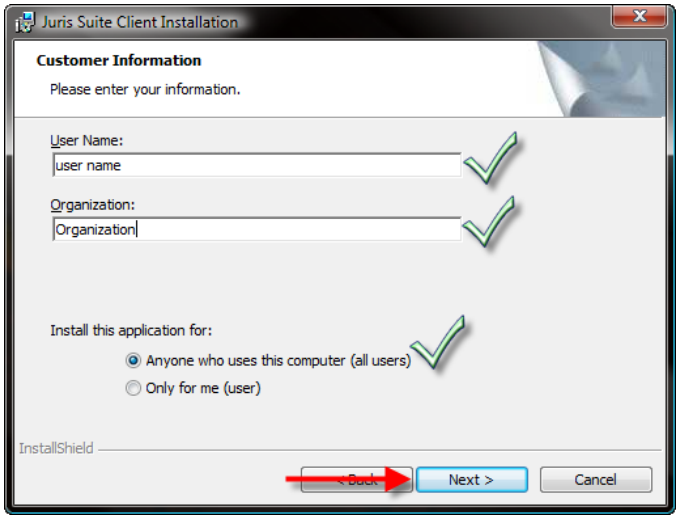
2. Click the ***Next*** button on the Welcome window.



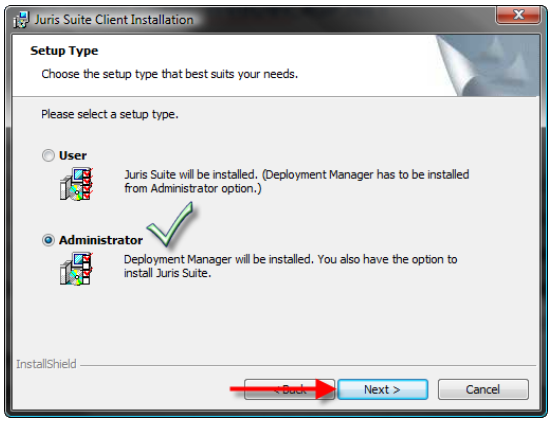
3. Accept the license agreement and click the ***Next*** button.



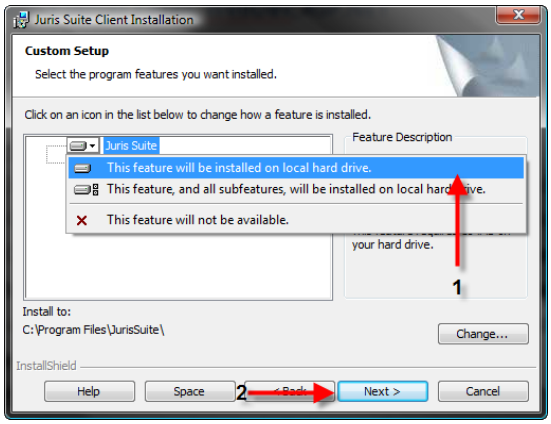
4. 1Enter the appropriate **Customer Information**, and click the ***Next*** button.



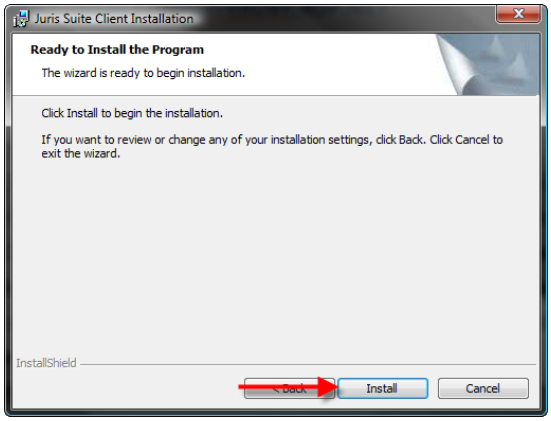
5. Choose ***Administrator*** and click **Next**.



6. If you **only** want the **Deployment Manager** click the **Next** button**.** However**,** if you want **both** the **Deployment manager** and the **JurisSuite client**, click on the **X** next to JurisSuite and select ***"This feature will be installed on local hard drive***". Click the ***Next*** button***.***



7. Click **Install.**



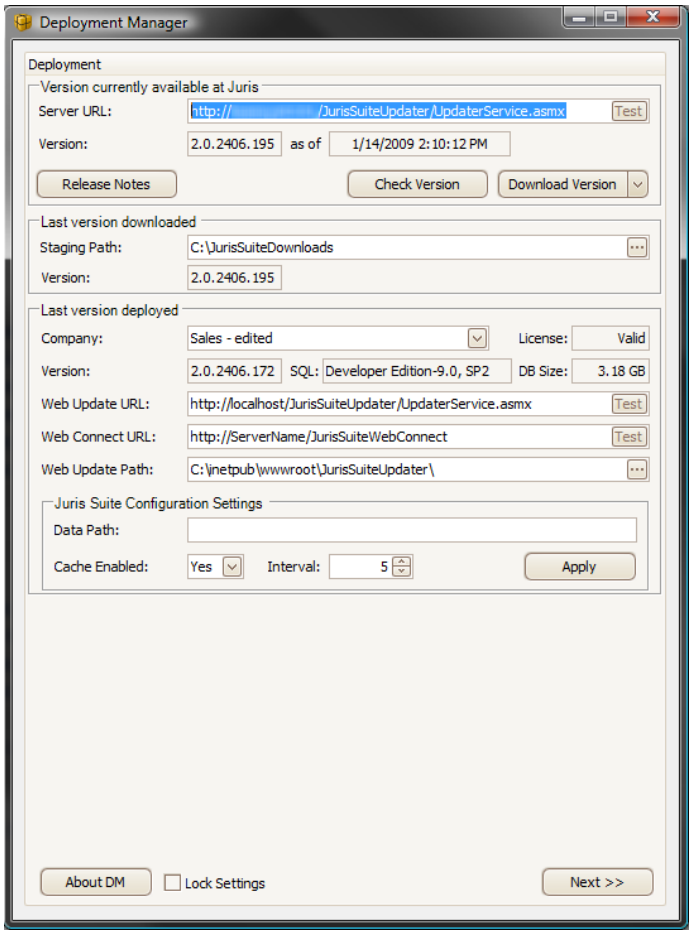
8. When the installation has completed, click the ***Finish*** button.

Deployment Manager Configuration

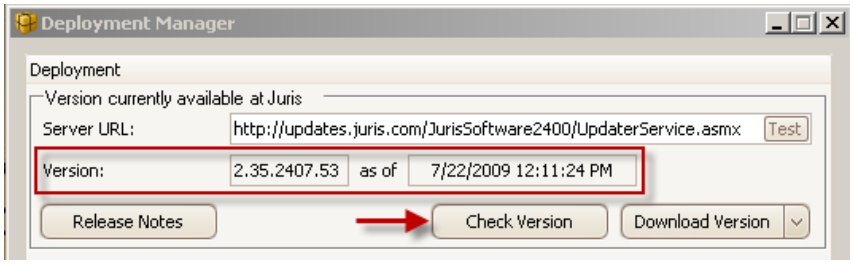
9. Start **JurisSuite Deployment Manager**. **Start>All Programs>Juris> JurisSuite Deployment Manager**

10. **Deployment Manager** will load and prompt you to enter and validate some basic information.

Note: If Deployment Manager does not start up, this means either Deployment Manager wasn't installed on the SQL server or the SQL Management Objects Collection wasn't installed during the Pre-Install Requirements section.



11. Click the ***Check Version*** button.



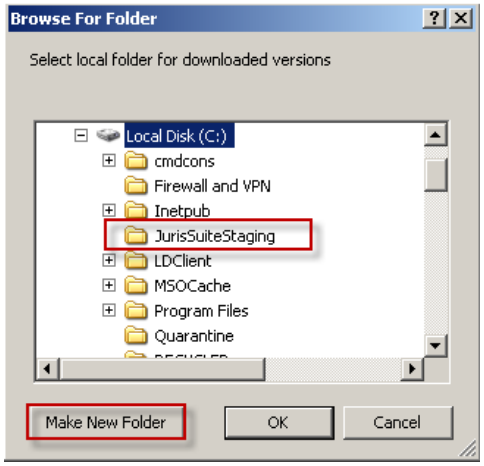
Note: Version number will differ from the image above. It is only used as an example. If you want to review the release notes for the version listed, click the **Release Notes** button. This will launch a separate window in the form of a browser.

The next section is for the Staging Path. This is for storing deployment files. Workstations will not need access to this folder.

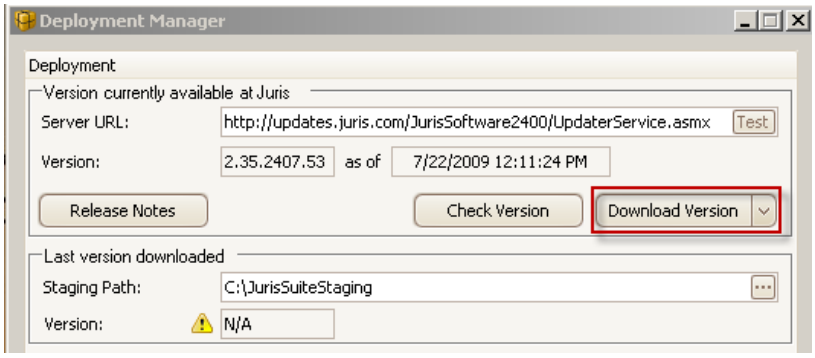
12. Use the ellipses button (…) to open the **"Browse For Folder"** Window.

13. Click once on the root directory that JurisSuite is being installed to.

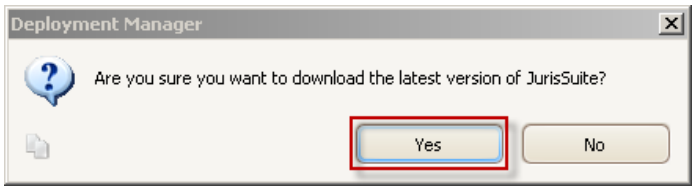
14. Click **Make New Folder** and name the new folder **JurisSuiteStaging**. Then click **OK**.



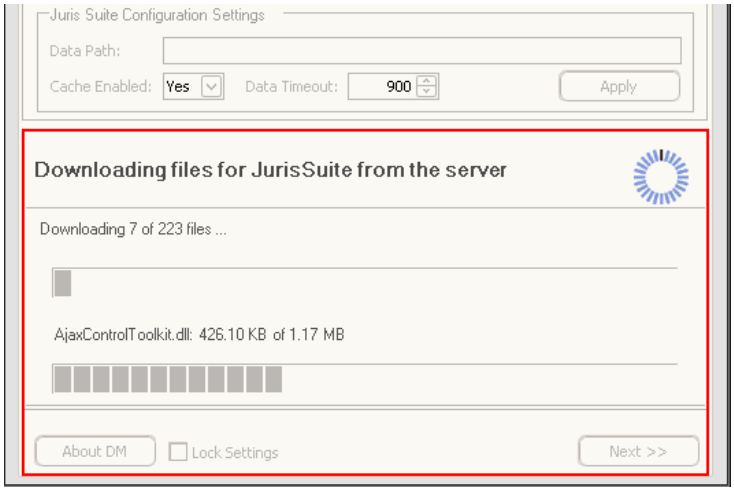
15. Now that the Staging Path is set we can start downloading files. By clicking on the ***Download Version*** button.



16. You will be asked if you are sure you want to download the latest version of JurisSuite. Click **Yes**.



The files will begin to download. This process can take up to 1 hour depending on your connection speed. A status window displays progress of the files being downloaded.



Upon completion, a download log will be displayed at the bottom of the main Deployment Page. This log is useful in determining cause of a failed file download.

The next area to configure is the Last version Deployed section. If you have multiple licenses that are licensed for JurisSuite then you will have to come back to this section after deploying and select the next Company to be deployed.

17. Select the **Company** that you will be deploying JurisSuite against.

18. Check that the **License** is Valid and make note of the **Database Size**.

Note: Servers running **SQL 2005/2008 Express** will not want to deploy if DB Size is **larger than 3.3GB** as this will put the database very close to the **4GB limit** after deployment. The firm will have to upgrade to **Full SQL 2005/2008** in order to deploy JurisSuite.

19. Replace the word **ServerName** in the Web Update URL with the name of the server JurisSuite Server was installed on.

20. Click **Test** to validate the site.

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****.*

21. Click **OK** on the validation box.

22. Click **Yes** to the Replace Client Path box.

WebConnect 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 **WebConnect** follow ***steps 23 through 25***, otherwise skip to ***step 26***.

23. Replace the word **ServerName** in the Web Connect URL with the Outside IP address that remote users will be able to access to.

24. Click **Test** to validate the site

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.

25. Click **OK** on the validation box.

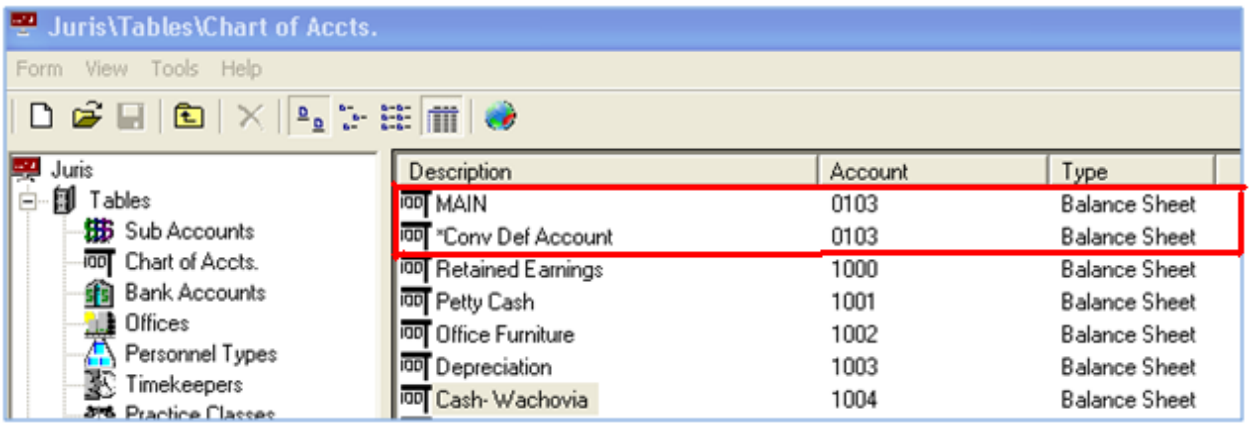
Citrix Installation Settings

The **JurisSuite Configuration Settings** 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.

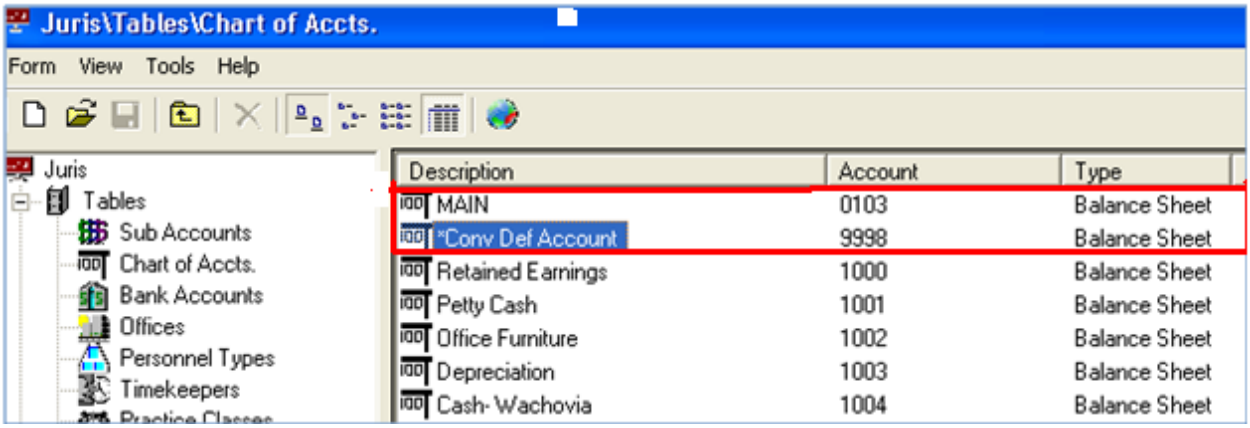
- **Data Path -** This setting is not required for regular environment setups. It is to be used as an alternate path for Juris support files (like cache database). For example: **'C:\Juris' or 'C:\Juris\@profileuser'**. You may also use a UNC path to if the user has a Home folder setup on the network. If '@profileuser' is used, it will be replaced with the current user's network login. This is ideal for a Citrix or Terminal Server environment where you want to designate the data location.
- **Cache Enabled -** Cache Enabled is designed to help speed up data requests for users on WebConnect. This setting is set to 'Yes' by default. It should be changed to 'No' unless the firm has mostly laptops that will be using the WebConnect feature. Citrix and Terminal Server environments do not require cache to be enabled since they are on the network already.
- **Interval –** This sets the amount of time between cache synchronizations. This should be increased if workstations are constantly synchronizing the cache. This means synchronizations are overlapping and not completing.

26. Place a check in **Lock Settings** at the bottom to prevent all the settings from being changed.

*****NOTE*** There is a potential issue for some clients that must be addressed before they deploy their database to 2.4. 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. See below.**



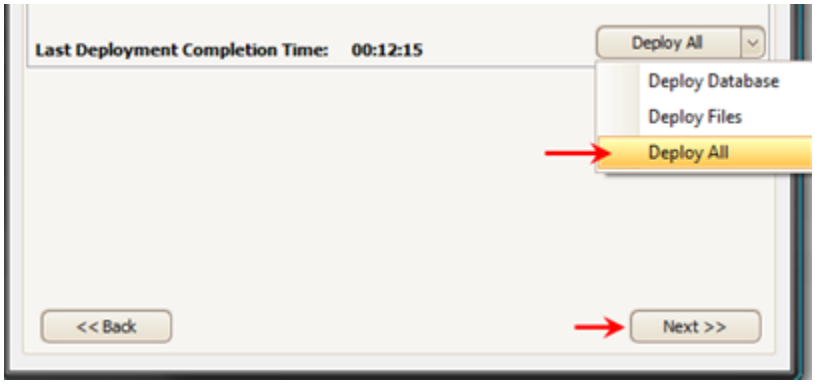
Before deploying, one of the duplicate accounts must be re-numbered so that there are no duplicates. See below. Failure to do this will cause a failed deployment. Once this is done, please proceed with deployment.



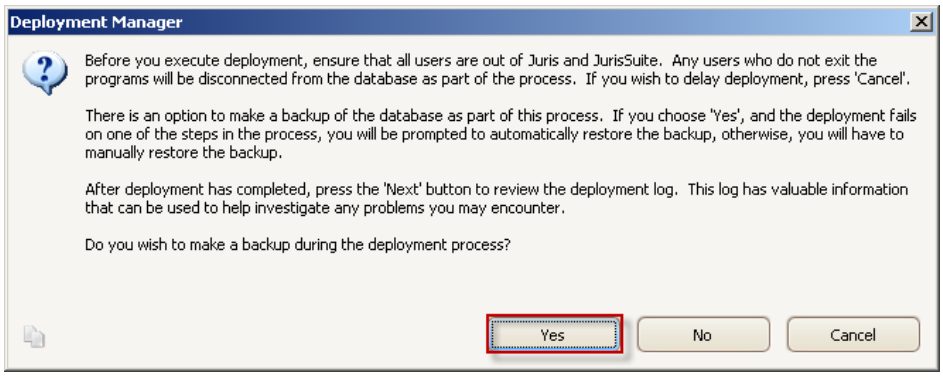
Deploy JurisSuite Updates

27. Click the ***Next*** button to proceed with the **Deployment** phase.

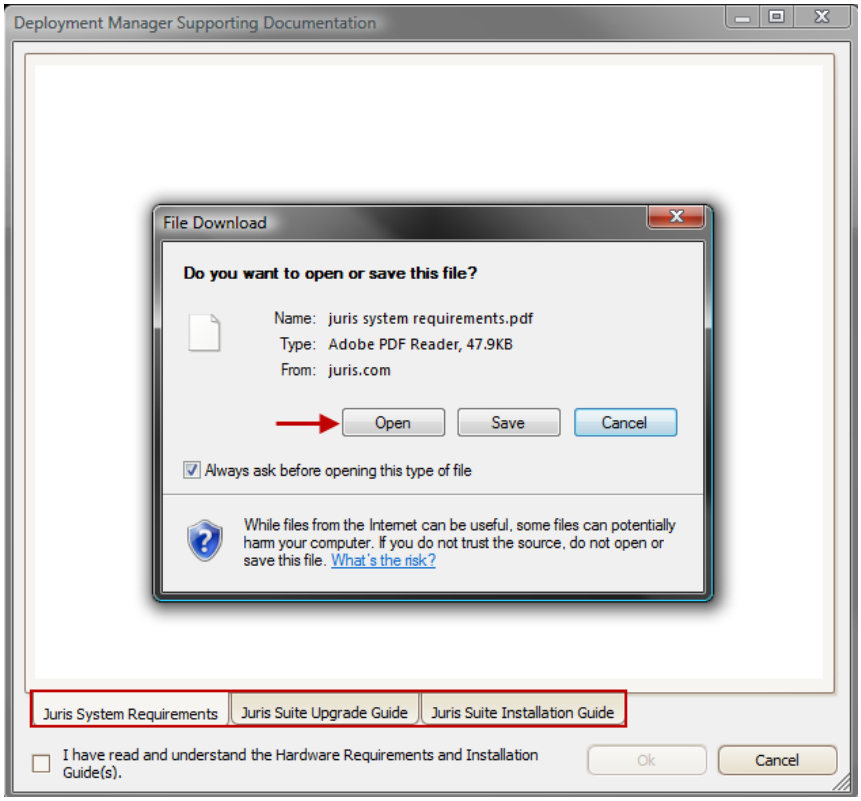
28. The **Deploy** button has three choices. Accept the default of '**Deploy All**'. This will ensure all of the components are updated properly. Using the '**Deploy Database**' can be used to simplify the process for clients that have multiple databases. Each database must be deployed with the updates. Using the '**Company'** combo box on the initial **Deployment Manager** page allows for database selection.



29. A window will display providing you with advice and the inquiry as to whether or not you want to make a **Backup** of the database during the deployment. Click the ***Yes*** button.

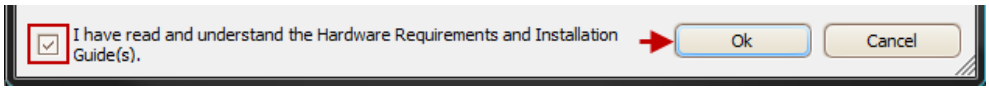


The next screen is a review of documents (including this one) and acceptance of the review. Included are the ***Juris System Requirements***, ***JurisSuite Upgrade Guide*** and the ***Installation Guide***. Read the appropriate documents.

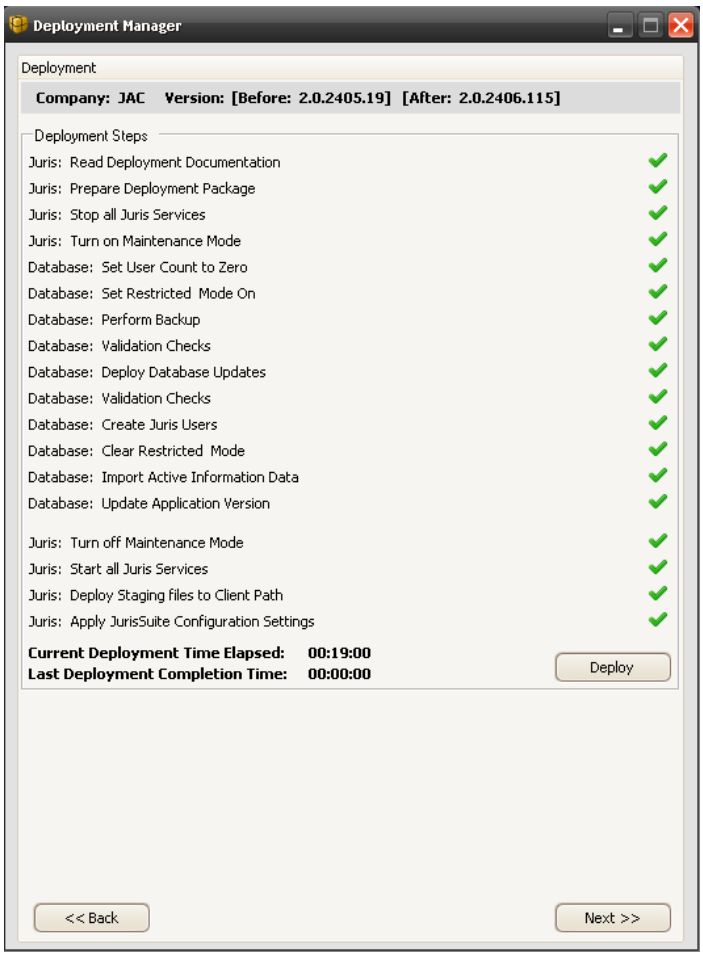


Note: You must have a program to view the **PDF** format files. Adobe Acrobat Reader is the most common and is available as a free download.

30. Click inside the checkbox for '**I have read and understand the System Requirements and Install Guide(s)'**



31. Click the ***OK*** button. The deployment will commence and check off the steps as they complete.



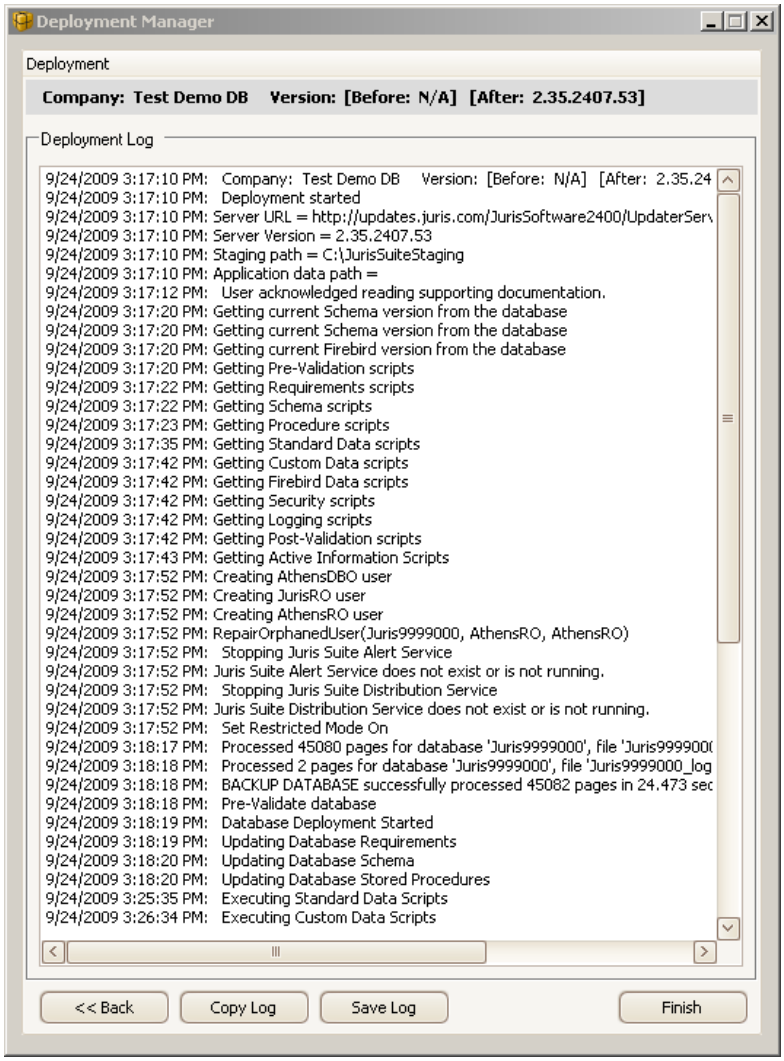
32. When the deployment completes, depending on the outcome you will be prompted for one of these two items. Perform the step below that corresponds with the screen.

a. If deployment is successful, click **Yes** to the prompt to delete the backup created. Continue to **step 34**.

b. If deployment failed, click **Yes** to restore the backup created. After restoring, follow **step 35** and be sure to save the error log and call **Juris Support** at **877-377-3740.**

A deployment summary will disclose all the tasks that finished without error or with error.

33. Click the ***Next*** button. The **Deployment Log** window will appear.



34. If you want to save a version of the log, click the ***Save Log*** button. This will prompt you to save the log file with a .txt file extension. You can also use the ***Copy*** button if you want to send the contents of the log to the **Clipboard**. Click the ***Finish*** button when complete.

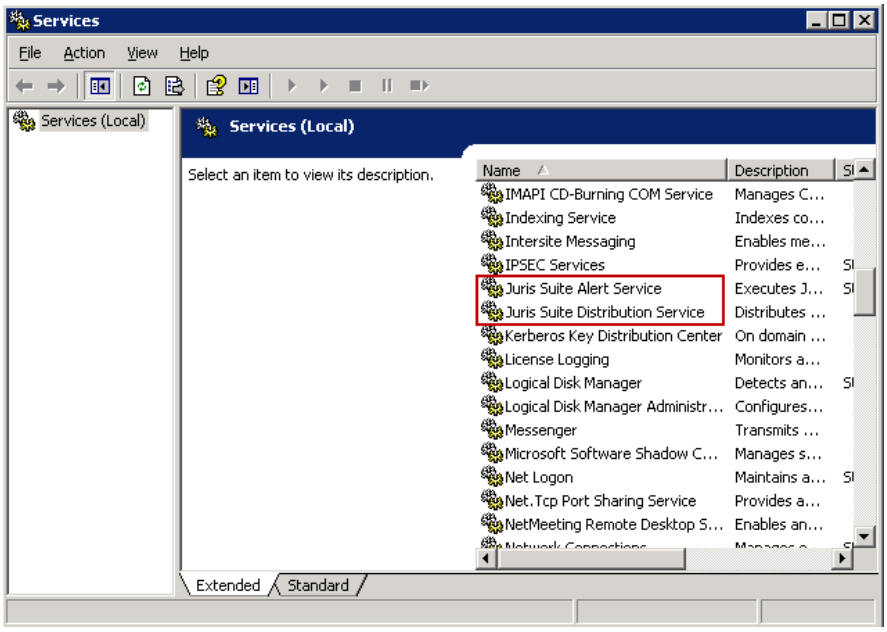
35. Click **Yes** to exit Deployment Manager.

Configuring and Starting JurisSuite Services

This is a requirement for the **JurisSuite Business Intelligence** and **JurisSuite Core Reporting** Snap Ins to function properly. Skip this section if both of these modules were not purchased.

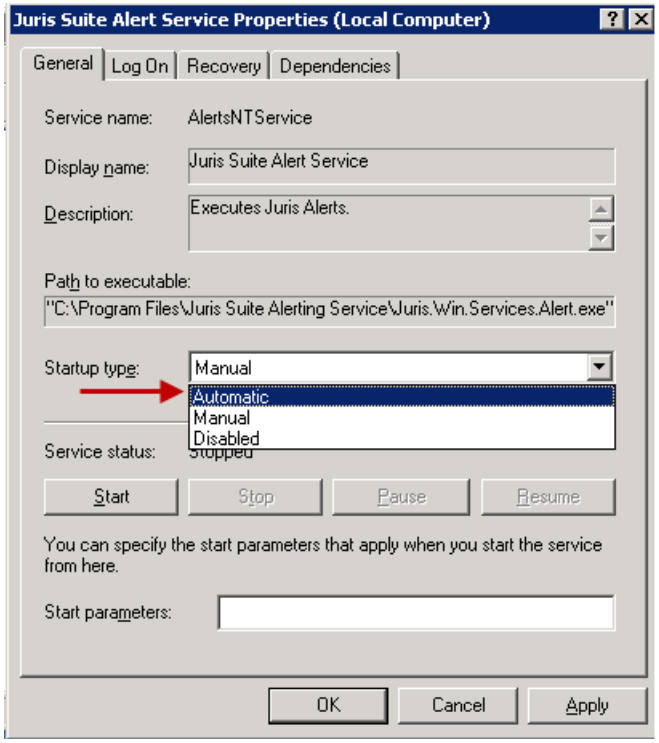
36. Open services by going to **Start> All Programs> Administrative Tools> Services.**

37. Scroll down to the **JurisSuite Alert Service** and **JurisSuite Distributions Service**. First we'll configure and start the JurisSuite Alert Service.



38. Double click the ***JurisSuite Alert Service*** to bring up the **JurisSuite Alert Service Properties** window.

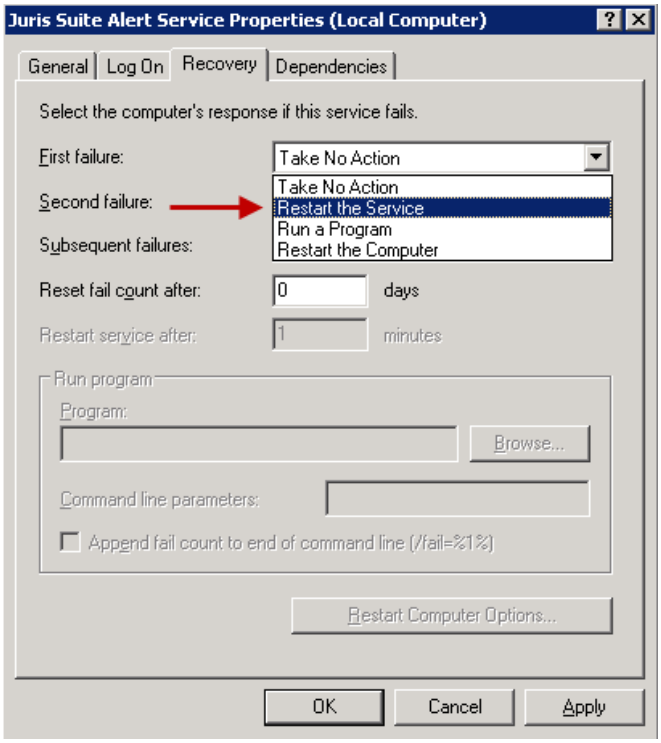
39. In the **Startup type** drop down, select ***Automatic***



40. Click the ***Start*** button to start the service.

41. Click on the ***Recovery*** tab at the top.

42. For **First Failure**, **Second Failure** and **Subsequent failures**, click on the drop down menu and select ***Restart the Service***.



43. Click the ***OK*** button to close out of the properties and accept changes.

44. Repeat **Steps 38 through 43** using the **JurisSuite Distribution Service**.

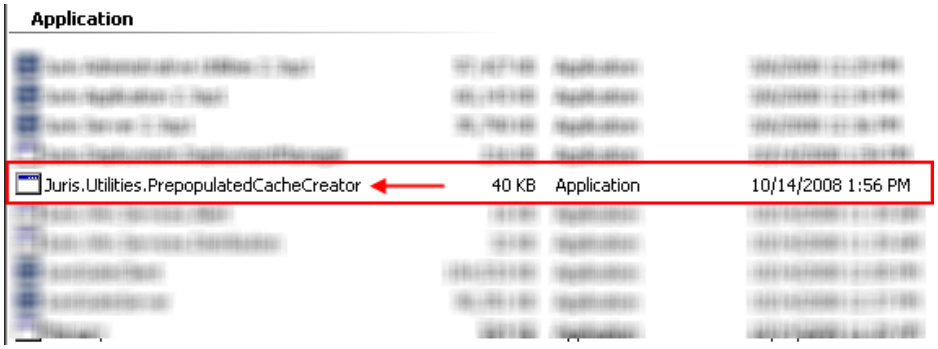
Creating a Pre-populated Cache (Optional)

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 PC 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 user only or if they have to rebuild and 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 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 a Windows 7 or Windows Server 2008 machine, you must choose to **run as administrator**.

On the drive JurisSuite Client was **installed**, navigate to **Program Files\JurisSuite\GeneralRelease.**

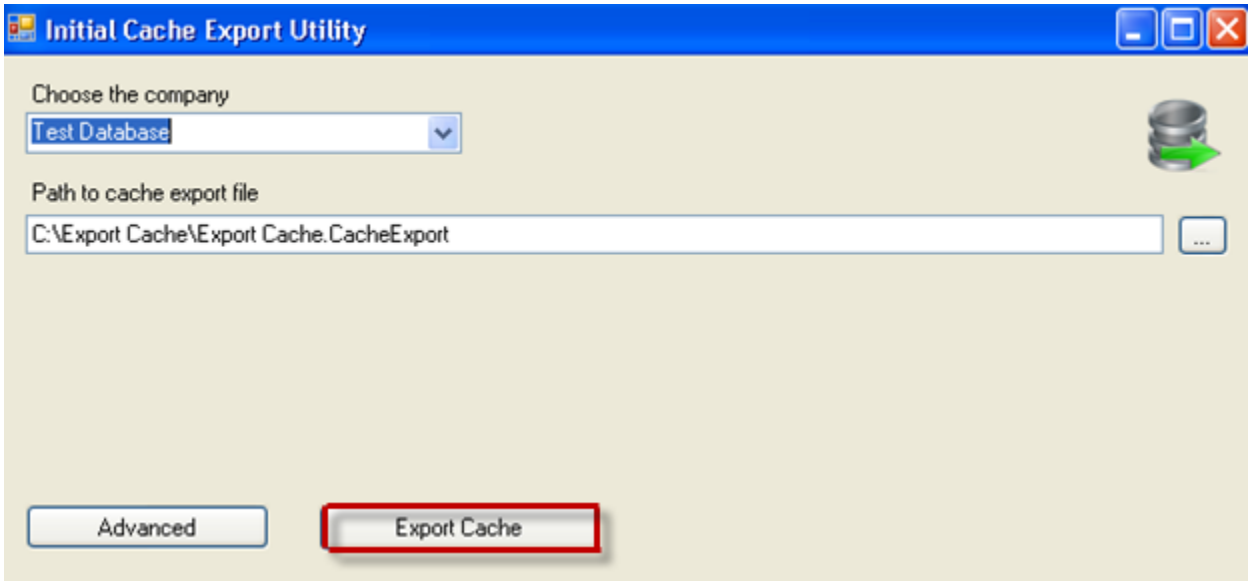
1. Locate and double click the executable file ***'Juris.Utilities.PrepopulatedCacheCreator.exe'.***



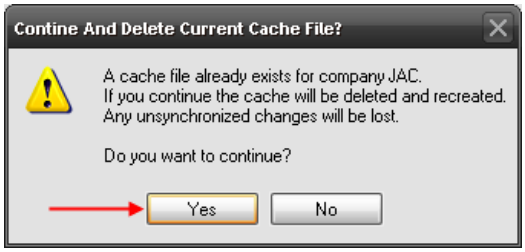
2. Select the Company to Export. You must do this for each company if you have more than one.

3. Enter the path to save the cache file. Remember to make sure that it is a location that can be accessed by those wanting to import. You can also use the ***ellipses*** button to navigate to the location.

4. Click the ***Export Cache*** button.



5. Click the ***Yes*** button on the continuation window.



6. When the Export has completed. Click the ***OK*** button.

7. Refer to the Juris Help file for instructions on how to create the attachment add-on files (if needed).

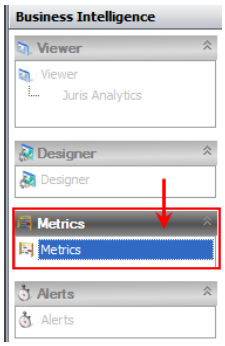
Publish the JurisSuite Dashboard Metrics

This is a requirement for **JurisSuite Business Intelligence** Snap In to display data in the dashboards. Skip this section if the module was not purchased.

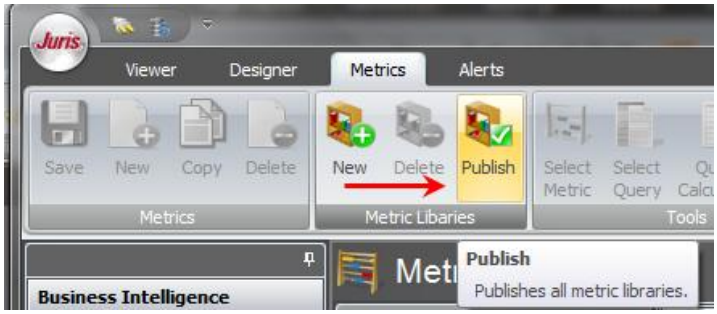
1. Log into **JurisSuite** as **SMGR.**

2. Click on the **Business Intelligence** snap in.

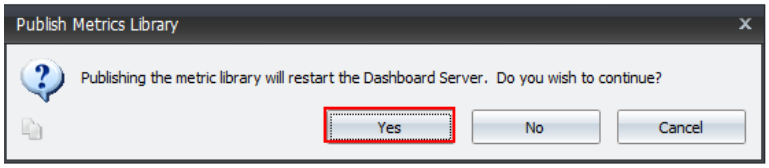
3. Click on the **Metrics Tab**.



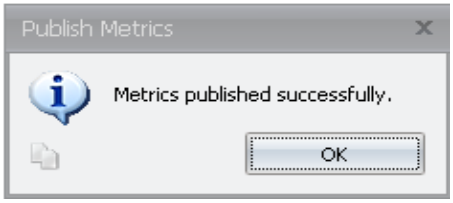
4. Click **Publish** on the **Metric Libraries** tool ribbon.



5. Click the ***Yes*** button to proceed.



6. Click **OK** after the Metrics have been published.

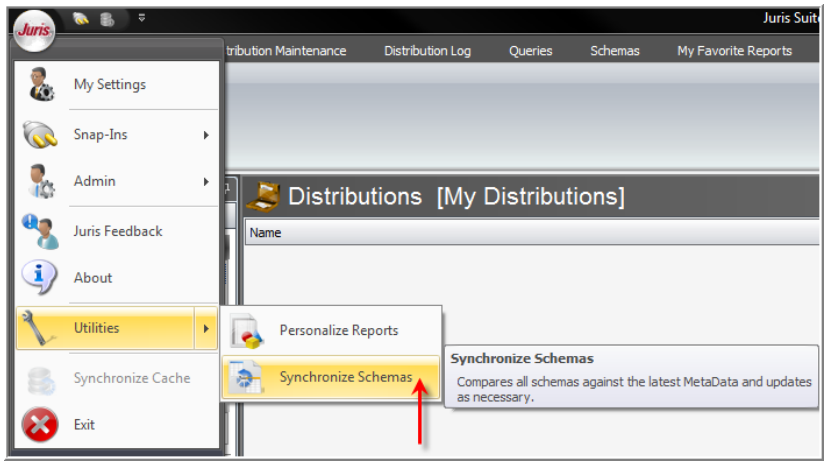


Synchronize Schemas

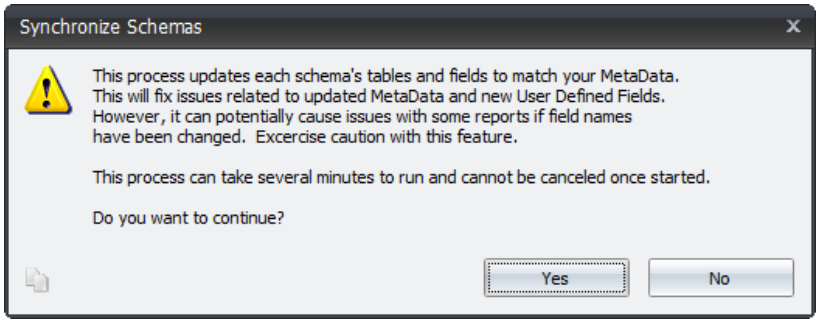
Synchronize Schemas is an important function that adds updated/changed information made to the Juris database table structure including metadata and UDFs (User Defined Fields). When you create a schema, it uses the metadata to display the tables and the fields. If additional tables or fields have been added to the metadata, they will not be in the existing standard or custom schemas. To make the fields available, you MUST run **'Synchronize Schemas'** to add that information to the existing schemas. This is an **Administrator** only function

1. Log In to **JurisSuite** as **SMGR**.

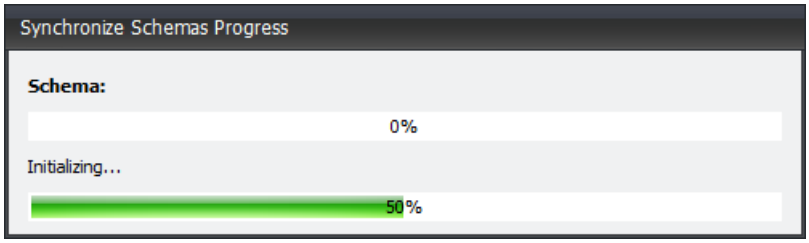
2. Select the **Synchronize Schemas** function from the **Utilities** menu item.



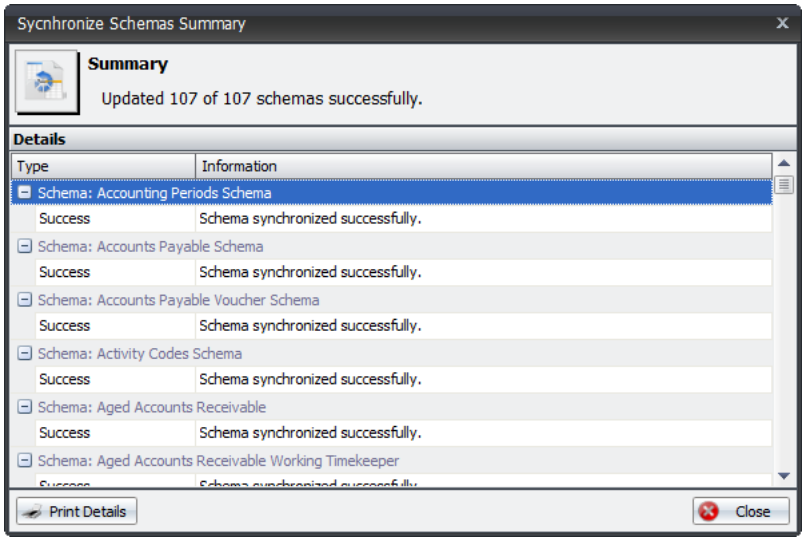
3. The **Synchronize Schemas** window will appear explaining the conditions of the function and whether you want to continue.



4. The process will begin and a status window will be displayed.



Upon completion, a summary window will appear.



5. You can click the ***Print Details*** button to print out the finished report.

6. Click the ***Close*** button when finished.

Client

Uninstall Previous MyJuris and JurisSuite Components

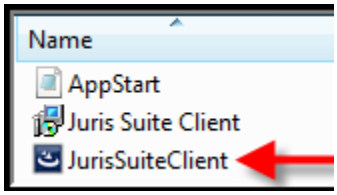
1. Open Add/Remove Programs by going to Start**>Control Panel> Add/Remove Programs.**
2. Locate and uninstall the following programs from the server (depending on what version was installed, you may not see all of the items below):
    - JurisSuite Client
    - MyJuris

Caution: When deleting folders, be sure to check the contents of the folder prior to deletion. This prevents accidental deletion of files that were improperly stored in the folder.

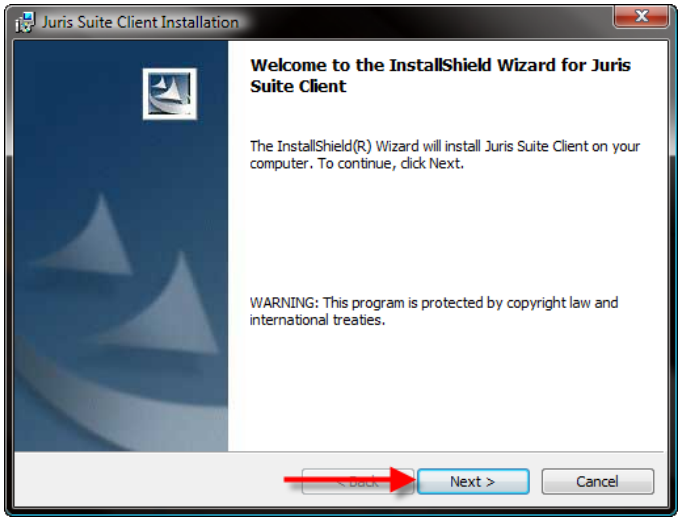
3. Delete the following folders and all subfolders.
    - Program Files\Juris **(Not Juris2)**
    - Program Files\JurisSuite

Install JurisSuite Client

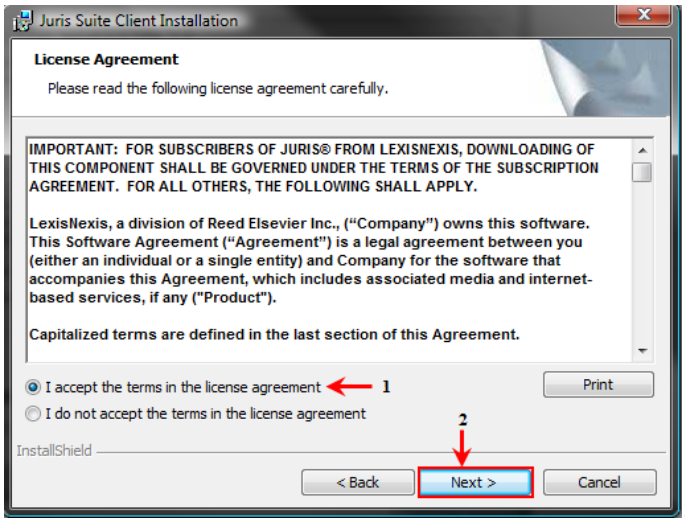
1. Browse to the extracted install files on the network share and double click the ***JurisSuiteClient.exe*** file.



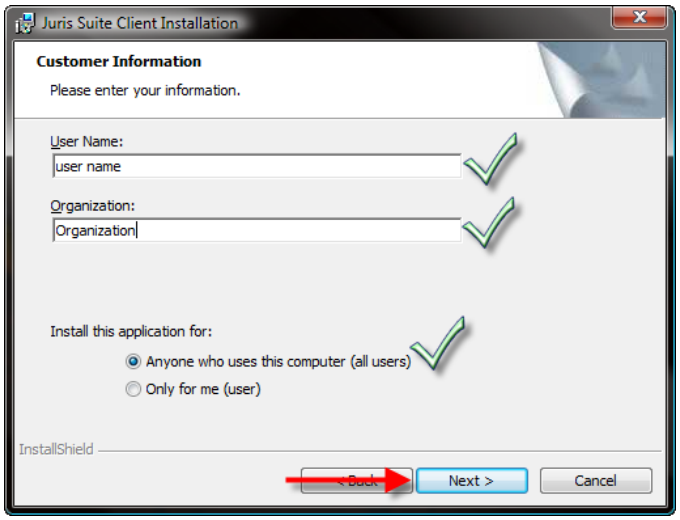
2. Click the ***Next*** button on the Welcome window.



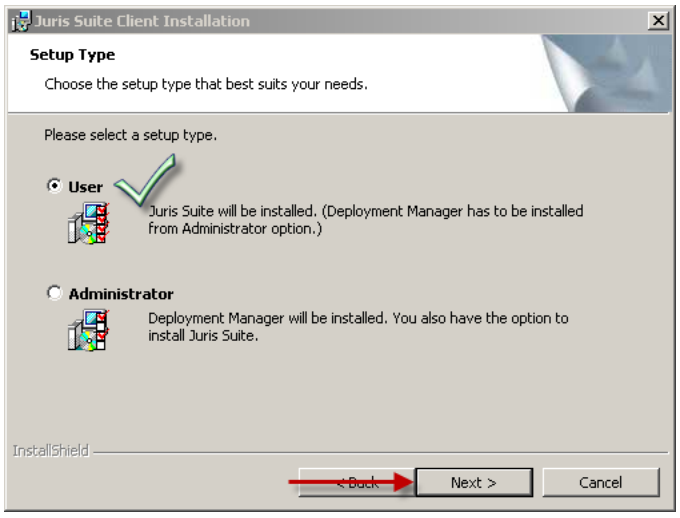
3. Accept the license agreement and click the ***Next*** button.


Juris Suite Client Installation
License Agreement
Please read the following license agreement carefully.
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.
I accept the terms in the license agreement
1
Print
I do not accept the terms in the license agreement
2
InstallShield
< Back
Next >
Cancel
2

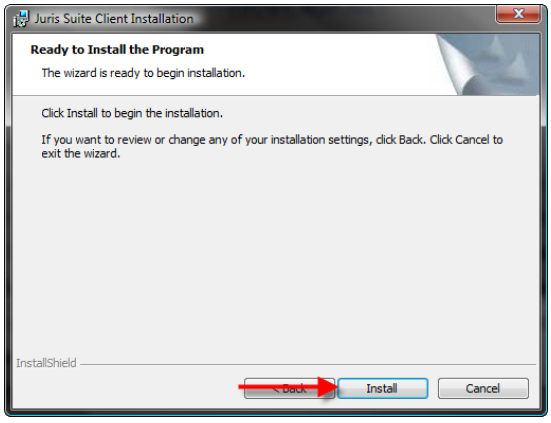
4. Enter the appropriate **Customer Information**, and click the ***Next*** button.



5. Keep the default of **User** and click **Next**.



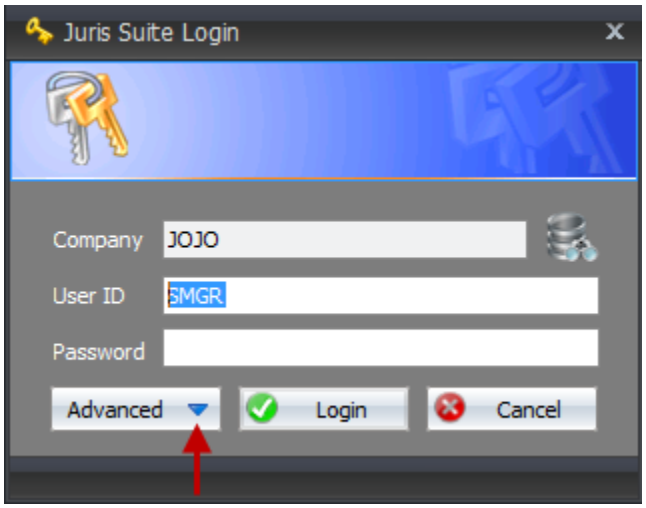
6. Click **Install**



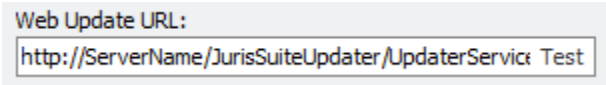
7. When the installation has completed, click the ***Finish*** button.

Client Configuration

1. Click the **Advanced** down arrow.



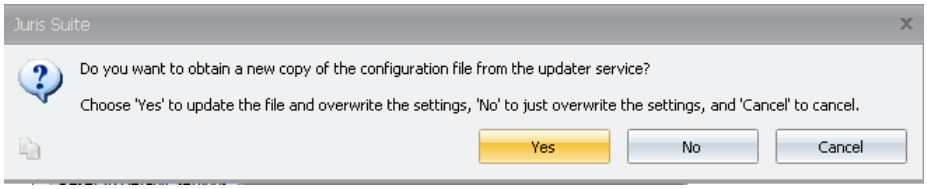
2. Replace **ServerName** for **Web Update URL** with the name of the server (for internal users) or the Outside IP Address (for WebConnect users).



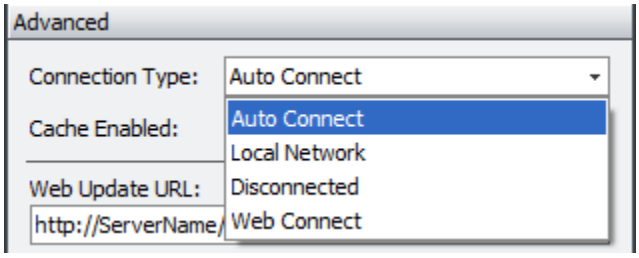
3. Click **Test** to validate the site. Then click **Ok**.

4. Click **Reset to Default Settings.**

5. Choose **Yes** to get a new configuration file. This will automatically populate the settings that were set in Deployment Manager and restart the program.



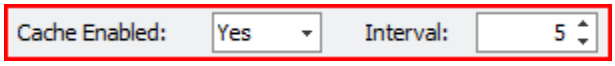
6. If WebConnect is required click **Advanced** again and select the **Connection Type** that the user will be mainly using. The default is '**Auto Connect'**. The program is designed to choose the next lowest connection type if the selected fails.



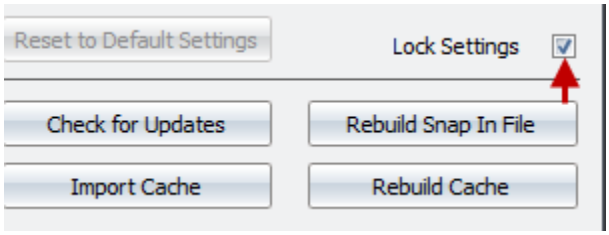
- **Auto Connect –** Allows the application to choose the connection. Recommended for Laptop that go between the office and home that does not have a VPN available.
- **Local Network –** Used if you are on a LAN. Does not require cache. Recommended for Citrix/Terminal Server Client installations and desktop/laptop computers in the office or working off VPN.
- **Disconnected –** Offline mode for users without an internet connection. Requires cache.
- **Web Connect –** Allows you to remotely use JurisSuite via an Internet Connection. Requires cache and the WebConnect URL to be filled out.

7. Set **Cache Enabled** to the appropriate setting for the above connection type**.** Cache Enabled **"No"** will automatically set the Connection type to **Local Network**.

8. Make note of the **Interval** times minutes. (Adjusted only for slower networks).



9. Check the **Lock Settings** box to prevent accidental changes to the above settings.

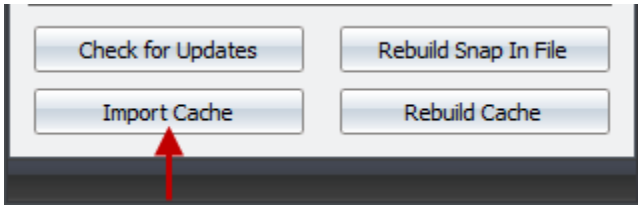


If cache is **enabled** for most of the company, it is strongly recommended to create a **pre-populated cache** to import initially to save time. Use the **Import Cache** button to Import a saved pre-populated **cache file** on a shared drive. See **Importing a Cache** section of this document.

Importing a Cache (Optional)

After a new install of JurisSuite client, you can import the cache before logging in. To import the saved cache, perform the following:

1. Launch the **JurisSuite** application.
2. On the log in screen, click the down arrow on the ***Advanced*** button.
3. 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 **JurisSuite**.

Conclusion for Upgrades from *MyJuris* 1.1 and JurisSuite Pre-2405

This concludes the upgrade of JurisSuite. It is recommended that you go through the JurisSuite Settings and Permissions document before allowing users to use JurisSuite. This document can be found in our Additional Product Documentation section of the Juris Support Center.

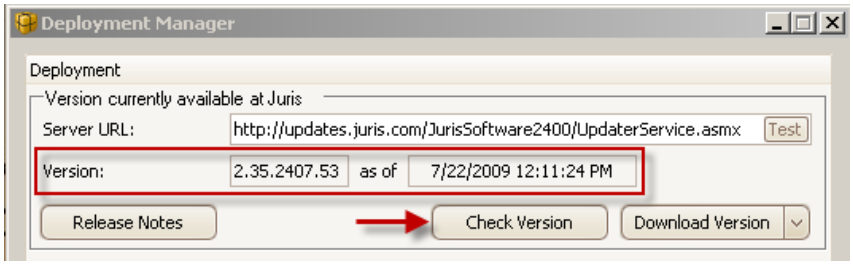
Upgrades from 2405 and above versions of JurisSuite

Server

Download the Deployment and Setup Files

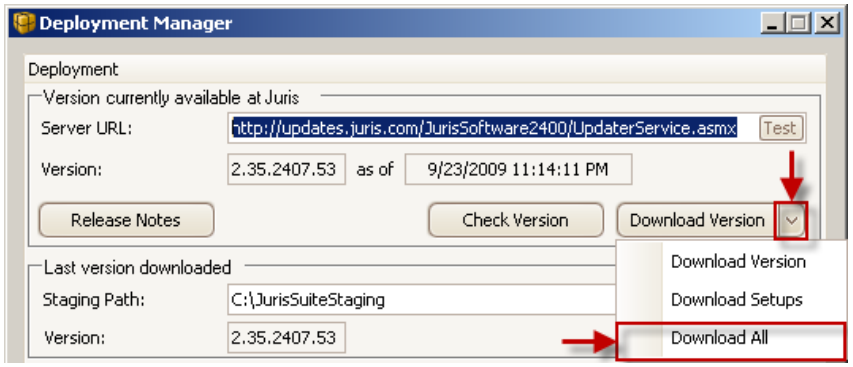
1. Start **JurisSuite Deployment Manager** by going to **Start>All Programs>Juris> JurisSuite Deployment Manager**

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

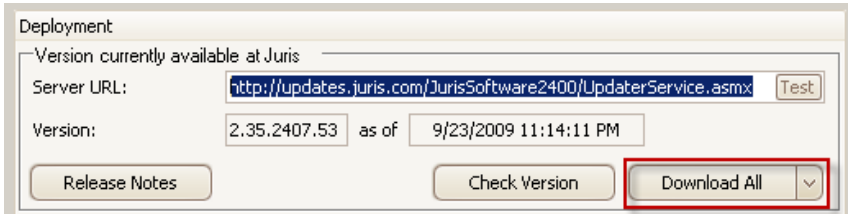


Note: Version number will differ from the image above. It is only used as an example. If you want to review the release notes for the version listed, click the **Release Notes** button. This will launch a separate window in the form of a browser.

3. Click the drop down for the Download Version button and select Download All.



4. Click the Download All button.



5. After downloads are finished, close out of Deployment Manager.

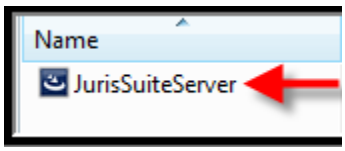
6. Navigate to the **Staging Path** and open the **Setups** folder**.**

Uninstall JurisSuite Server

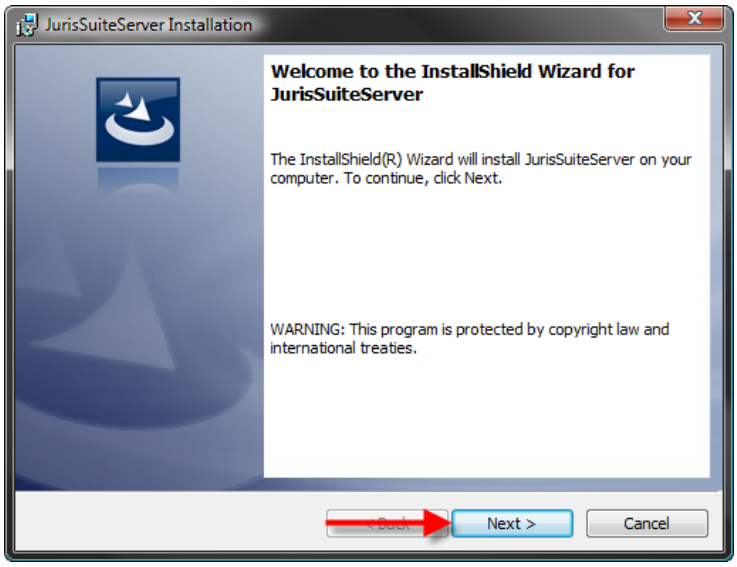
1. Open Add/Remove Programs by going to Start**>Control Panel> Add/Remove Programs.**
2. Locate and uninstall the following programs from the server:
    - JurisSuite Server
3. Open IIS Manager by going to **Start> Programs> Administrative Tools> Internet Information Services**
4. Under **Default Web Site** right click and delete any of the following sites if found
    - JurisSuite Updater
    - Juris Dashboard Server
    - Juris Distributed Reports
    - JurisSuite WebConnect

Installing JurisSuite Server (If using Windows Server 2008, see page 4 for IIS6.0 Compatibility Component Installation before proceeding)

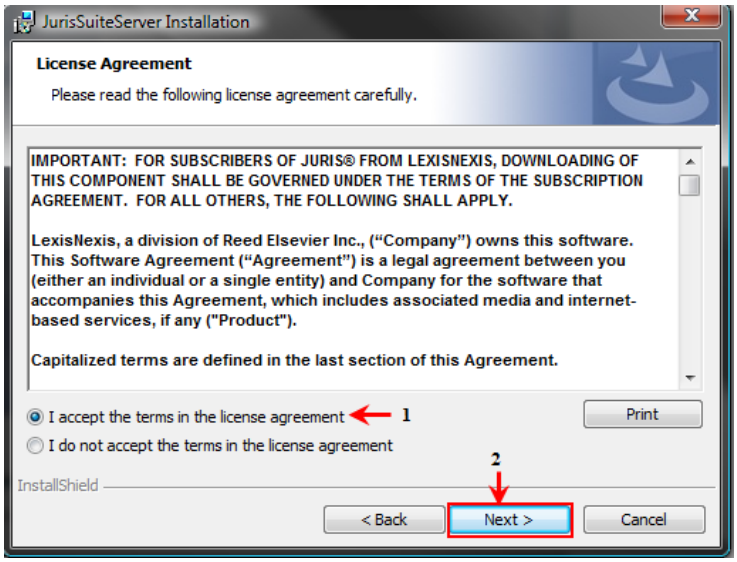
1. Navigate back to the ***Setups*** folder in the **JurisSuiteStaging** path and double click on the **JurisSuiteServer.exe** file to begin the installation.



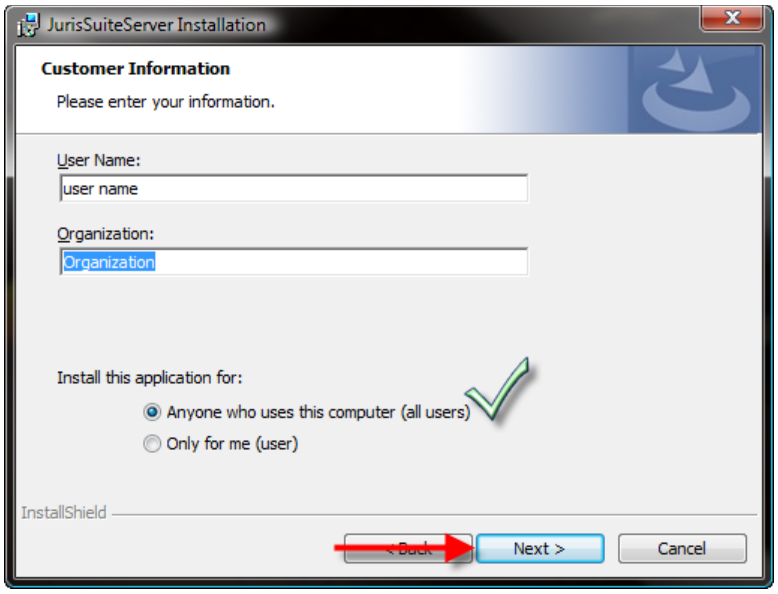
2. Click the ***Next*** button on the **Welcome** installation screen.



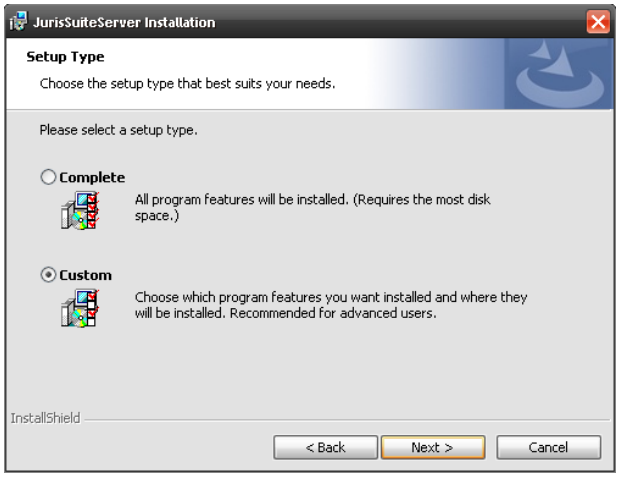
3. Select **"Accept"** on the license agreement window and click the ***Next*** button.



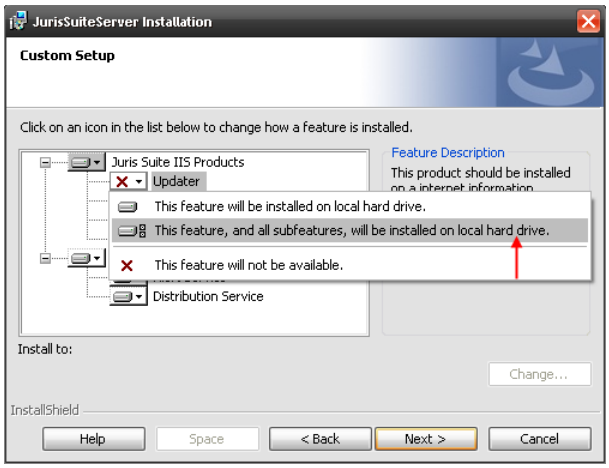
4. Enter the appropriate **Customer Information** and click the ***Next*** button.



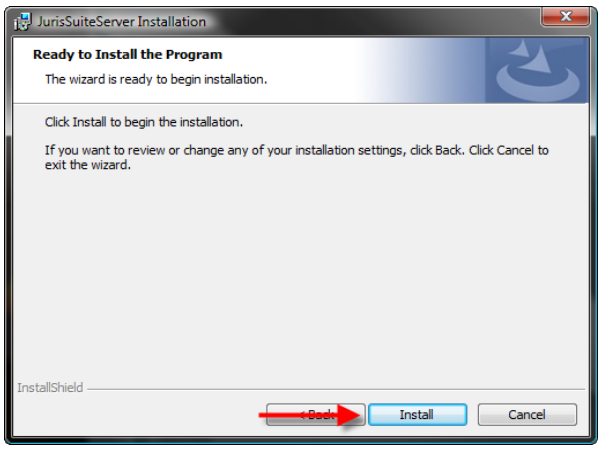
5. On the **Setup Type** window, if JurisSuite is being installed to the Local Disk C: drive, accept the default of ***Complete***, click the ***Next*** button and skip to ***step 20***. Otherwise if installing on any drive other than C:\ you should select ***Custom*** and click the ***Next*** button.



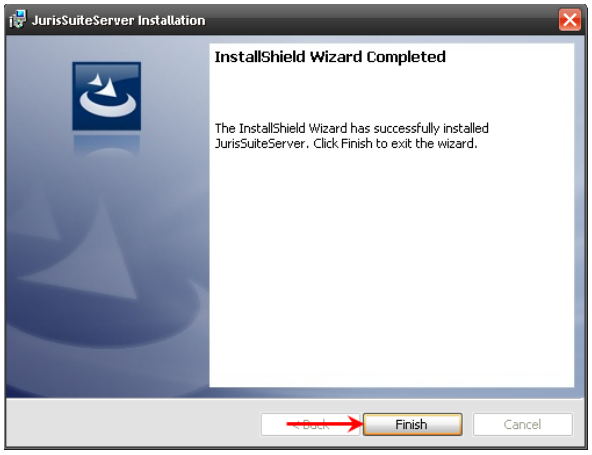
6. From the Custom install screen, you will need to select the ***Updater*** combo box under the JurisSuite IIS Products. Select ***"This feature, and all sub features, will be installed on local hard drive."***



7. Click the ***Install*** button to execute the installation of the server application.



8. Click the *Finish* button on the final window.

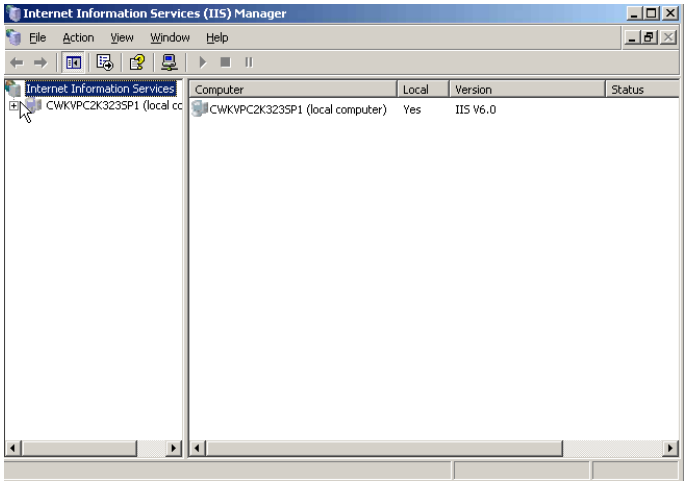


Configuration of IIS Server 2003

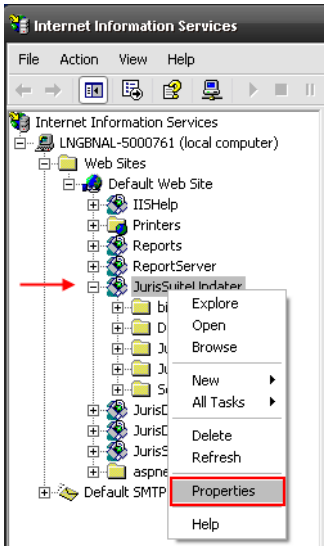
To properly configure IIS for JurisSuite, perform the following:

1. Start the **IIS** management console. This can be accessed from within the **Administrative Tools**. **Start > All Programs > Administrative Tools > Internet Information Services Manager**

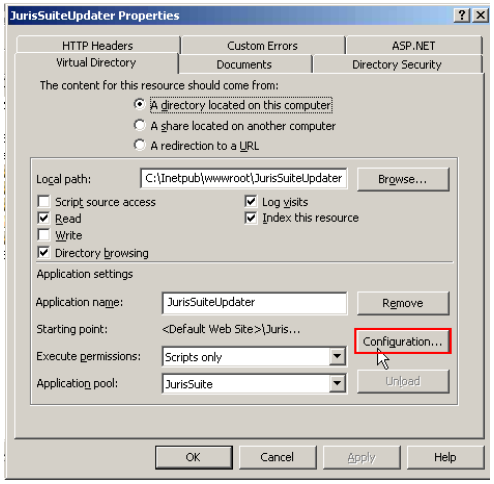
2. Expand the server in the left hand pane.



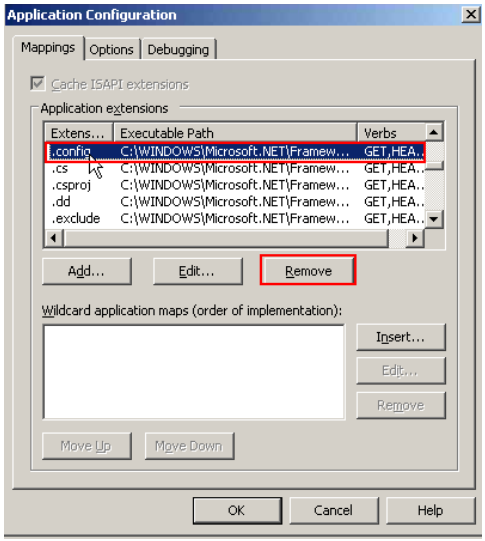
3. Expand the web sites. Right click on the **JurisSuite Updater** and select **Properties**.



4. On the **Virtual Directory** tab, click the ***Configuration*** button.

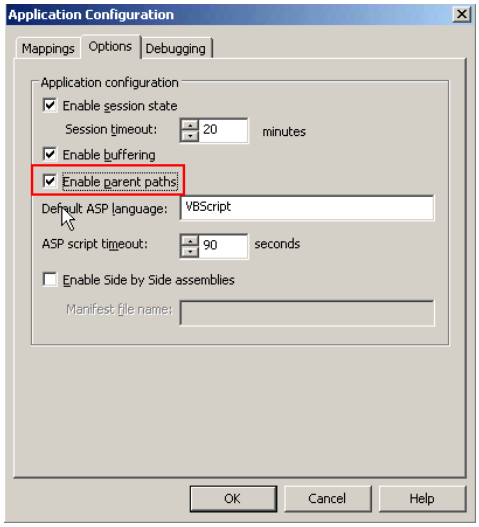


5. Select .config extension, and click the ***Remove*** button.



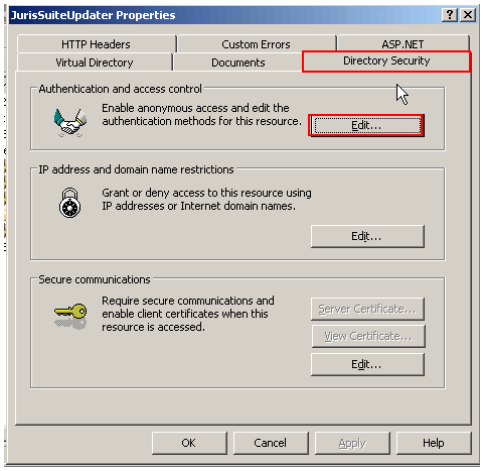
6. Click the ***Yes*** button to confirm removal of the extension.

7. Click the **Options** tab, and place a check in the **Enable parent paths** box.



8. Click the **OK** button.

9. Click the **Directory Security** tab, and click the ***Edit*** button under Authentication and access control.



10. Place a checkmark next to the **Integrated Windows Authentication** if no checkmark exists. Click the ***OK*** button.

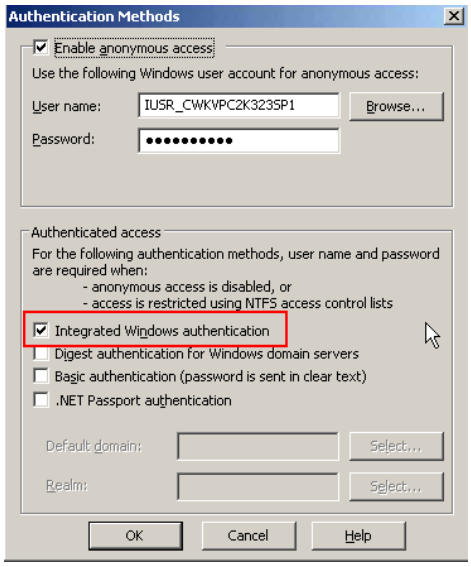
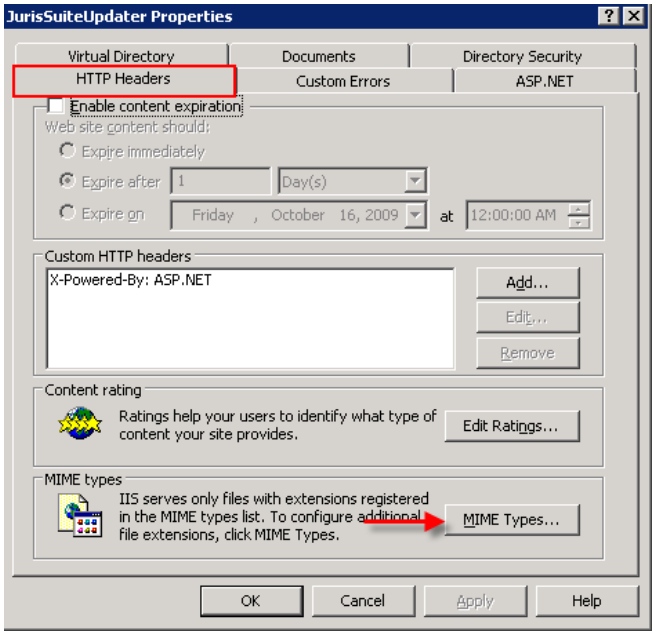
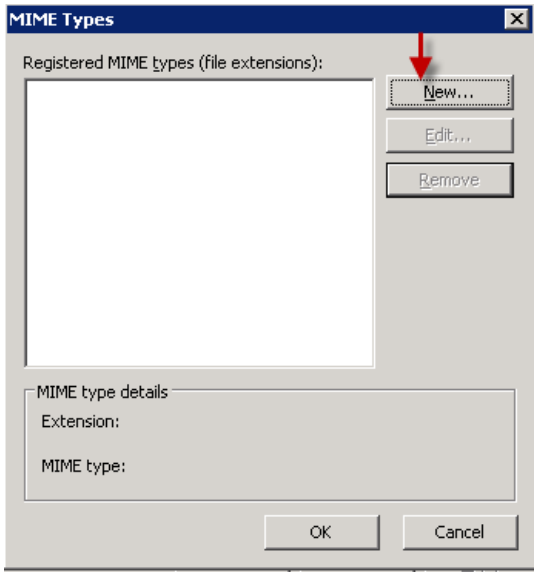


Figure 18.0

11. Select the **HTTP Headers** tab. Click the ***MIME Types*** button in the **MIME types** section.

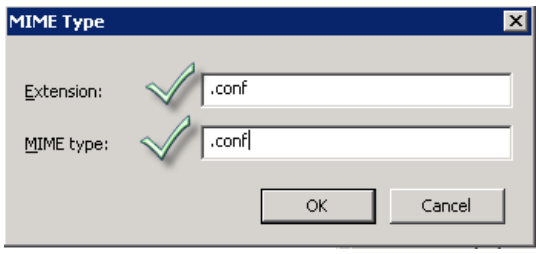


12. Click the ***New…*** button in the **MIME Types** window.

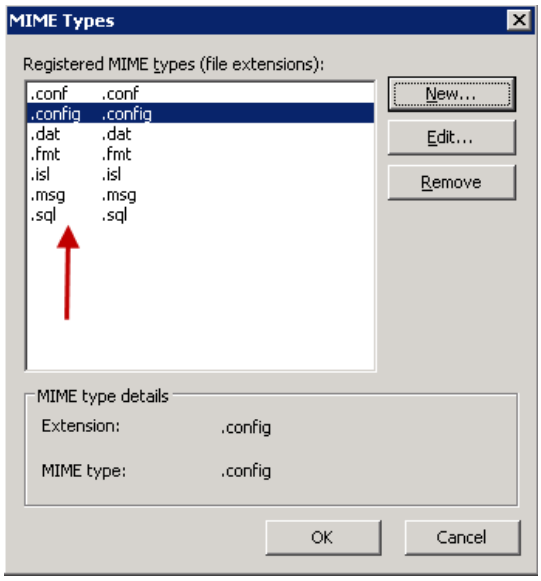


13. Enter each of the following types into the ***Extension*** and ***MIME type*** fields. Be sure to add the period before each extension. Click the ***OK*** button. Repeat the ***steps 33 and 34*** until all the types are added.

- **.conf**
- **.dat**
- **.fmt**
- **.isl**
- **.msg**
- **.sql**
- **.config**



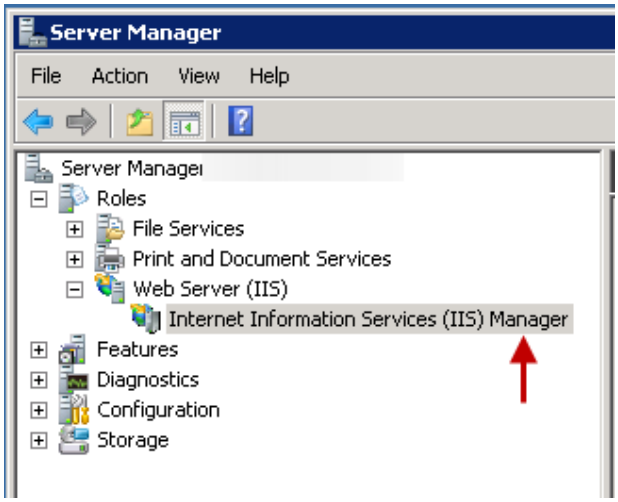
14. When you have completed, the window should look like the figure below. Click the ***OK*** button when complete.



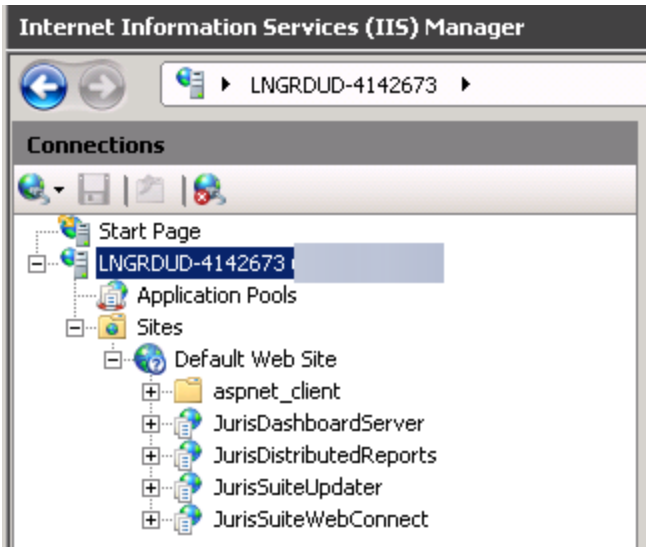
15. Click the ***OK*** button on the **JurisSuite Updater** window. Close the **Internet Information Services** window.

Configuration of IIS7/Windows Server 2008

1. Select **Server Manager>Roles>Web Server (IIS)>Internet Information Services (IIS) Manager**.

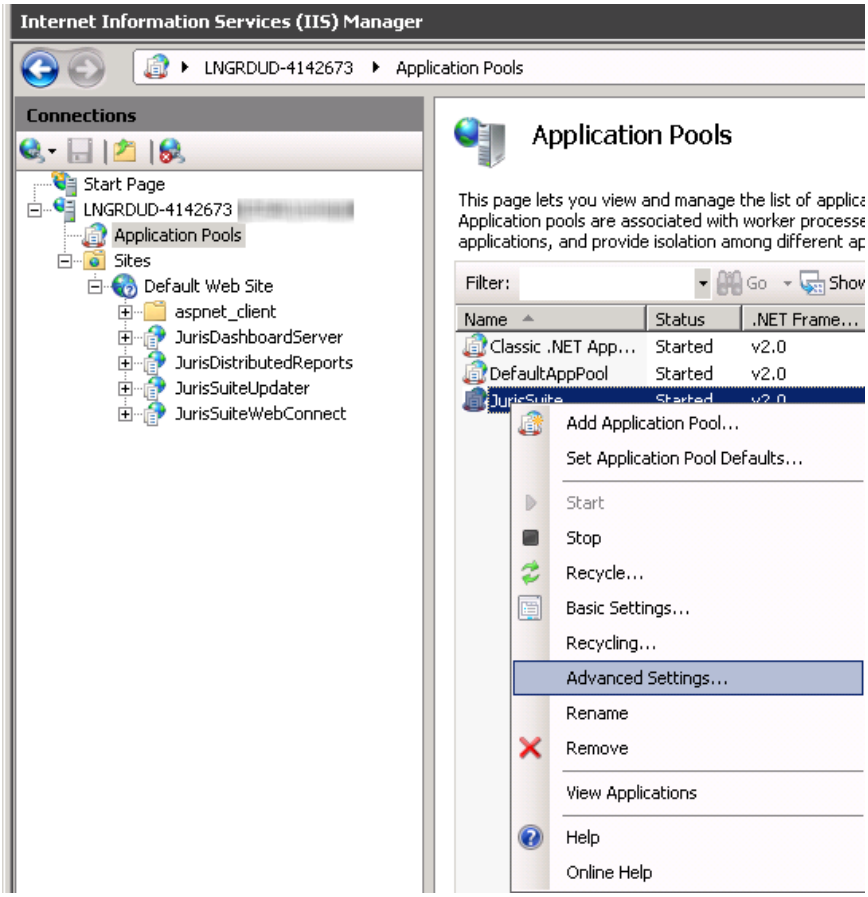


2. Expand the server and sites node.



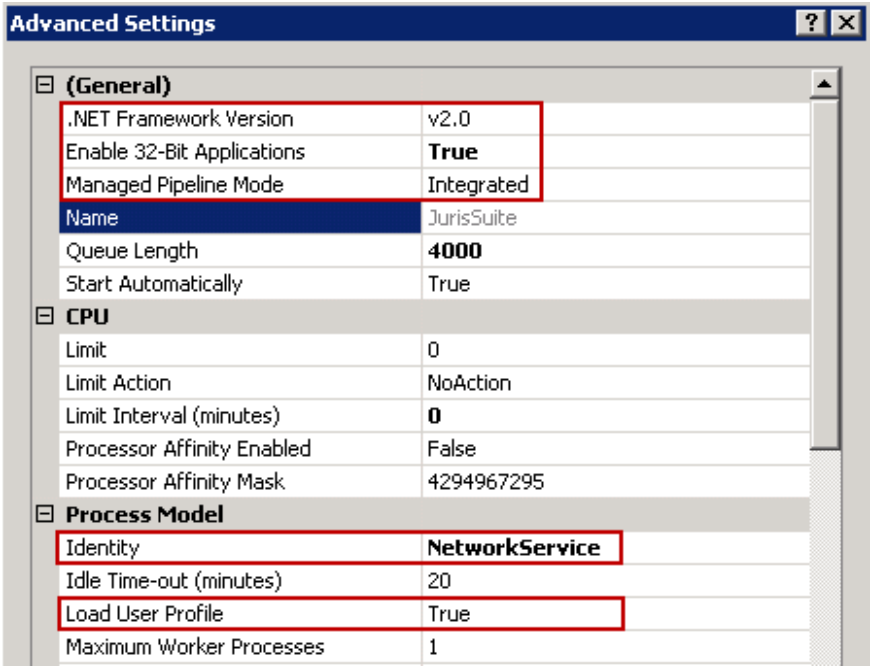
3. Select Application Pools.

4. In the display pane, right click on JurisSuite and select Advanced Settings.



5. Ensure that the following settings are enabled:

   - (General) Section
     - .NET Framework Version – v2.0
     - Enable 32-bit Application – True (if you are running 64 bit machine)
     - Managed Pipeline Mode – Integrated
   - Process Model Section
     - Identity – Network Service
     - Load User Profile – True

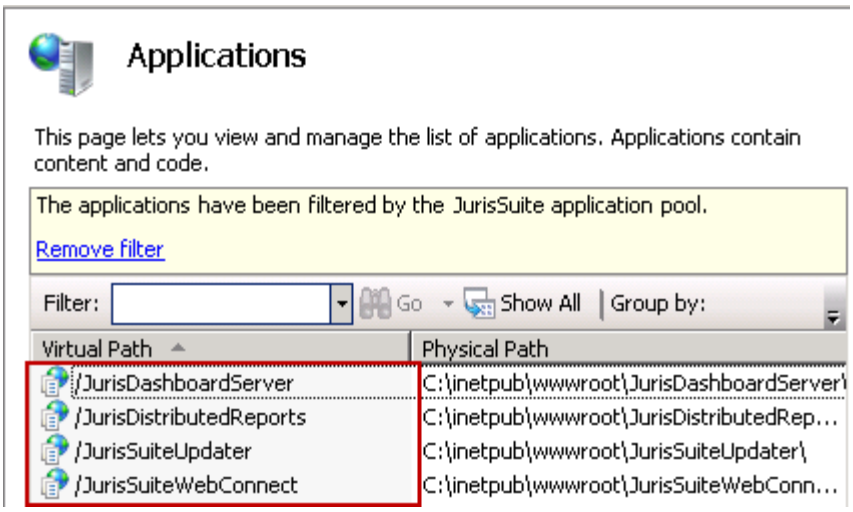


6. Click the ***OK*** button.

7. Right click on JurisSuite and select **View Applications**.

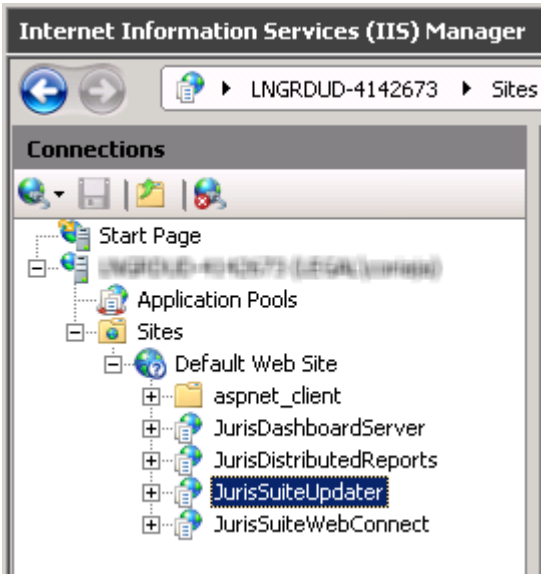
8. Ensure the following Applications are listed:

   - JurisDashboardServer
   - JurisDistributedReports
   - JurisSuiteUpdater
   - JurisSuiteWebConnect



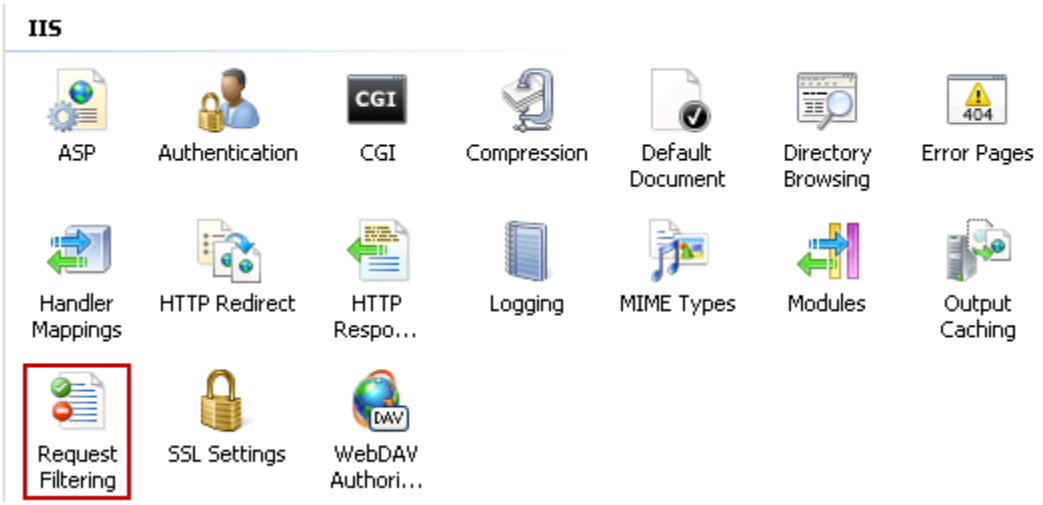
JurisSuiteUpdater Setttings

9. Under **Sites**, select **JurisSuiteUpdater**.

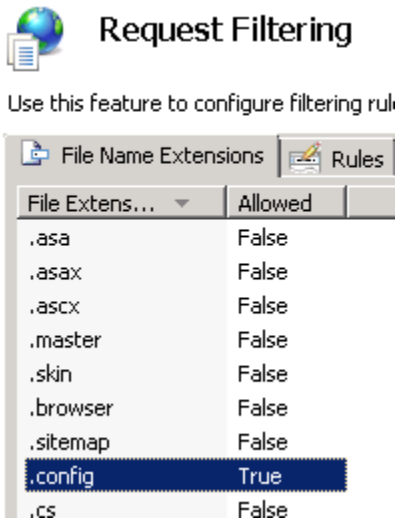


10. In the **IIS** section, double click **Request Filtering**.

Note: In some instances, Request Filtering may not show as below even if it is installed. Please refer to the following article on how to edit the Request Filtering file list via the ApplicationHost.config file.
http://support.microsoft.com/kb/942045/

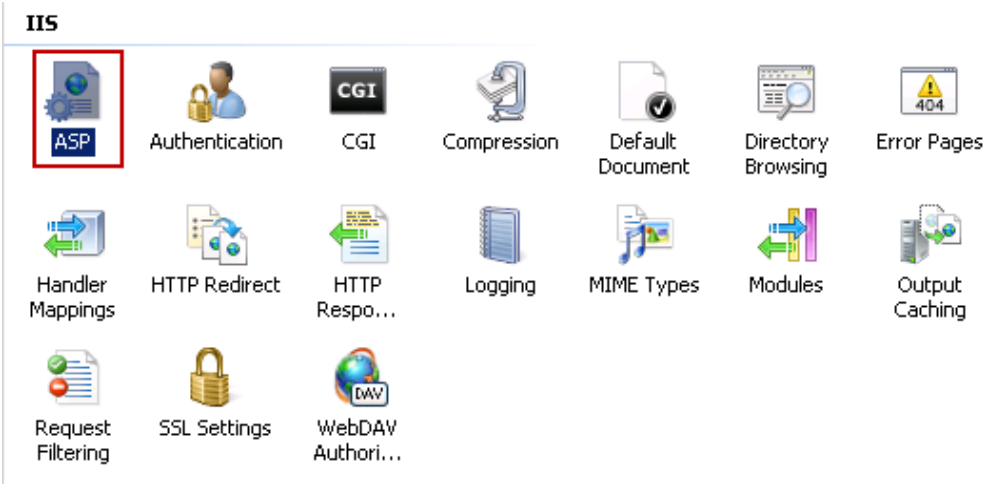


11. Ensure **File Extension** .**config** is set to **'True'**.

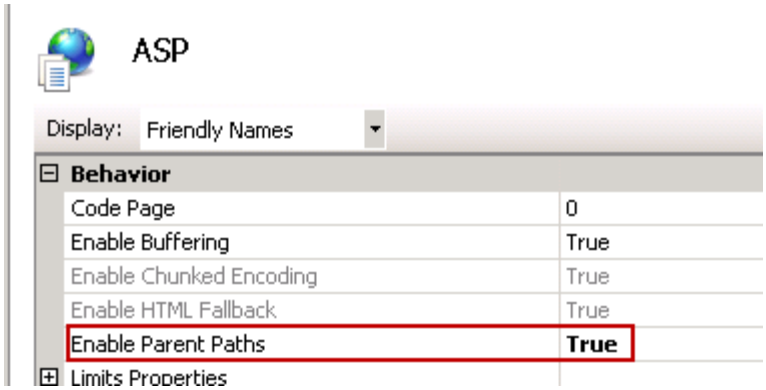


12. Return to the **JurisSuiteUpdate** site. You use the back browser button or simply re-select **JurisSuiteUpdater** under **Sites**.

13. In the **IIS** section, double click **ASP**.

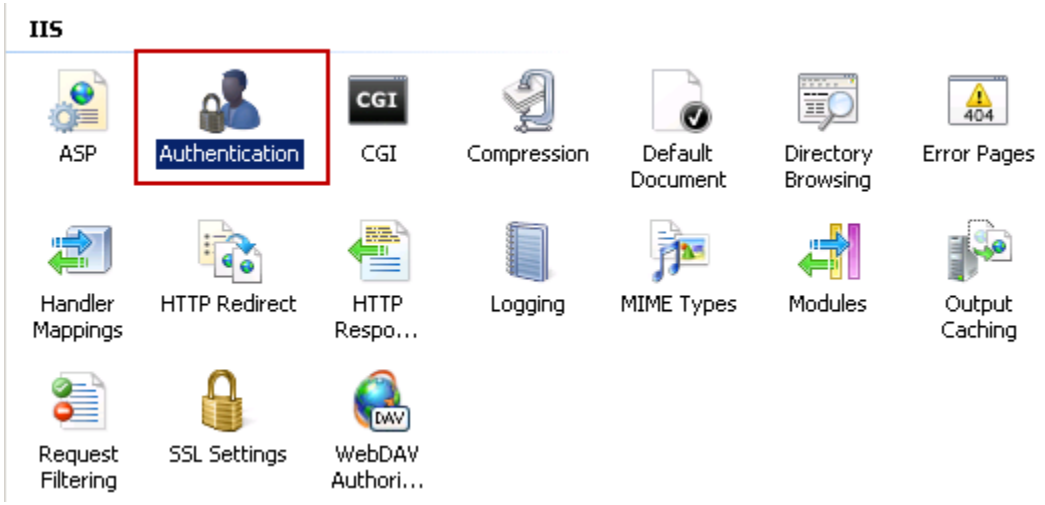


14. Ensure **Enable Parent Paths** is set to '**True**'

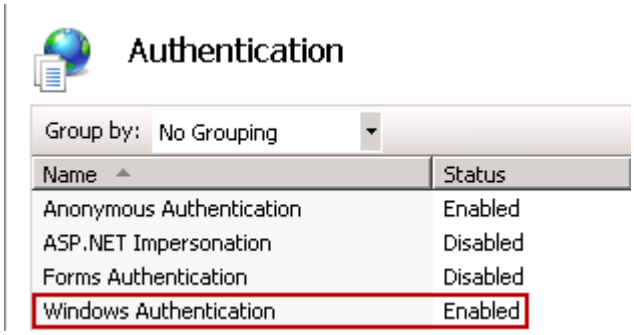


15. Return to the JurisSuiteUpdate site. You use the back browser button or simply re-select JurisSuiteUpdater under **Sites**.

16. In the **IIS** section, double click **Authentication**.

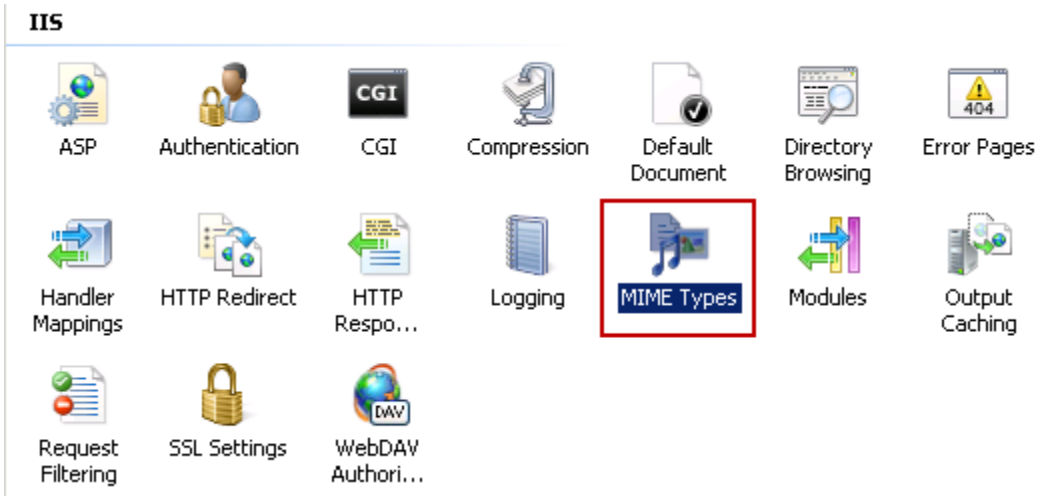


17. Ensure **Windows Authentication** is set to '**True**'

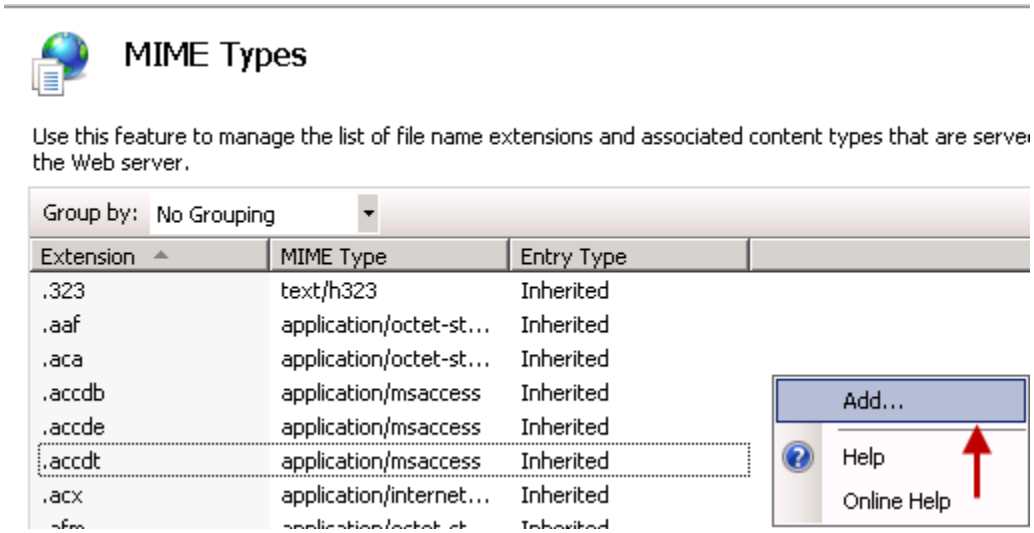


18. Return to the JurisSuiteUpdate site. You use the back browser button or simply re-select JurisSuiteUpdater under **Sites**.

19. In the **IIS** section, double click **MIME Types**.

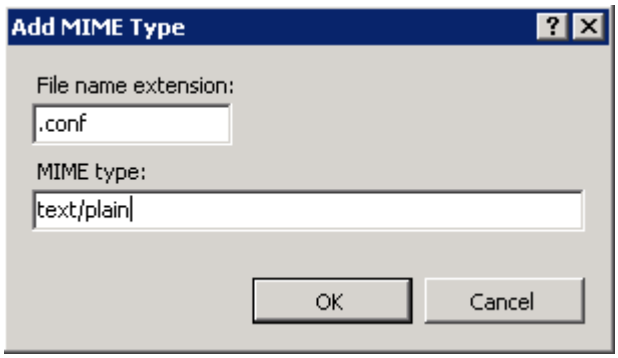


20. Right mouse click in the display pane and select **Add**. You can also use the **Add** link under the **Actions** pane.



21. Add the following types. You will have to add one at a time, entering 'text/plain' as the MIME type.

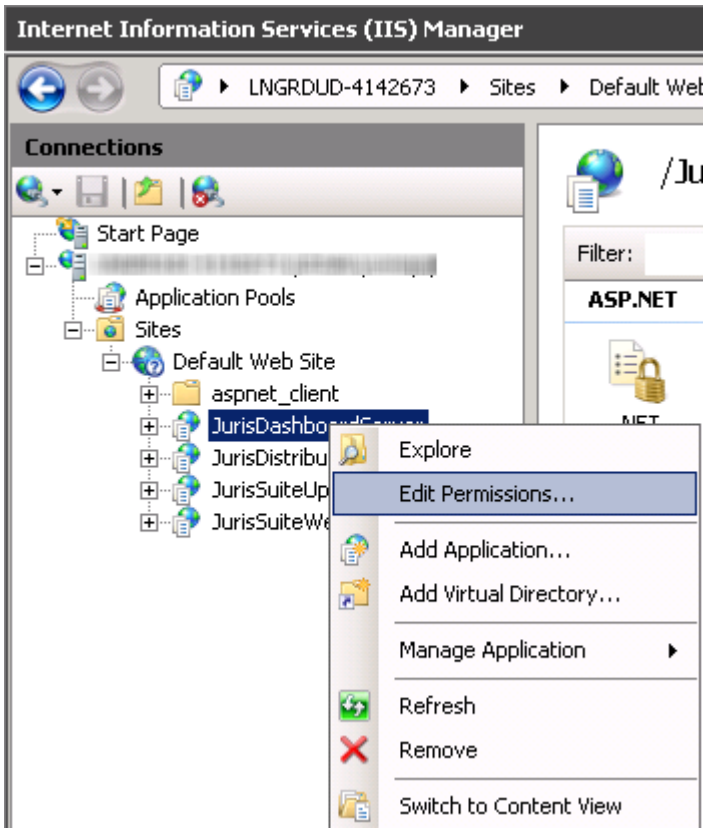
- .conf
- .dat
- .fmt
- .isl
- .msg
- .sql
- .config



Be sure to click the ***OK*** button each time to complete the additions.

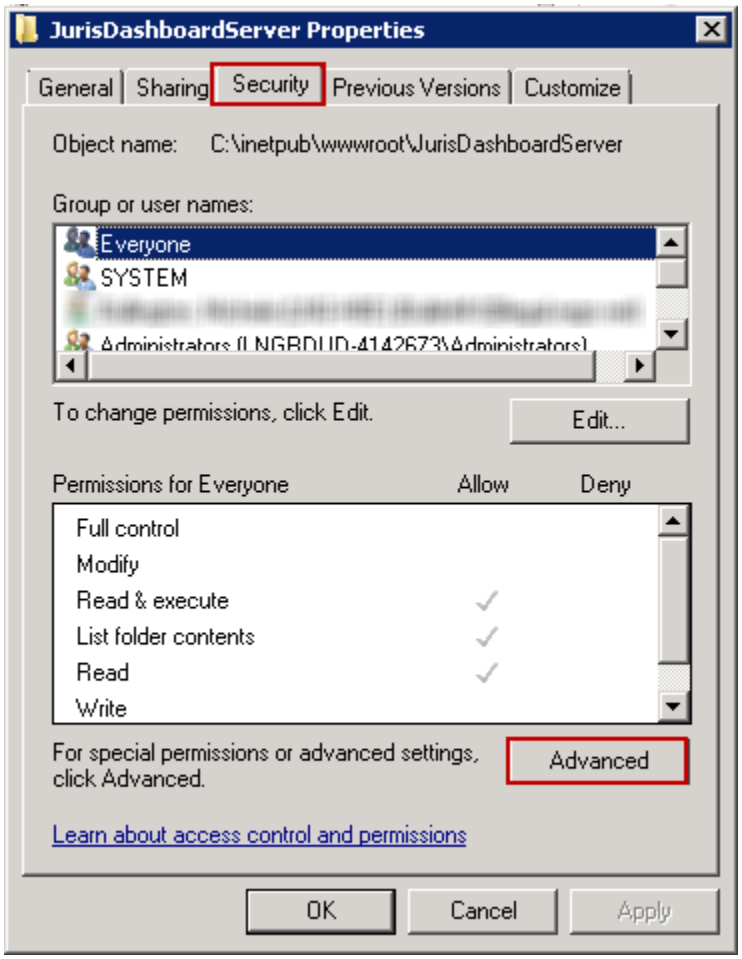
JurisDashboardServer Settings

22. Right click on the JurisDashboardServer and select **Edit Permissions**.

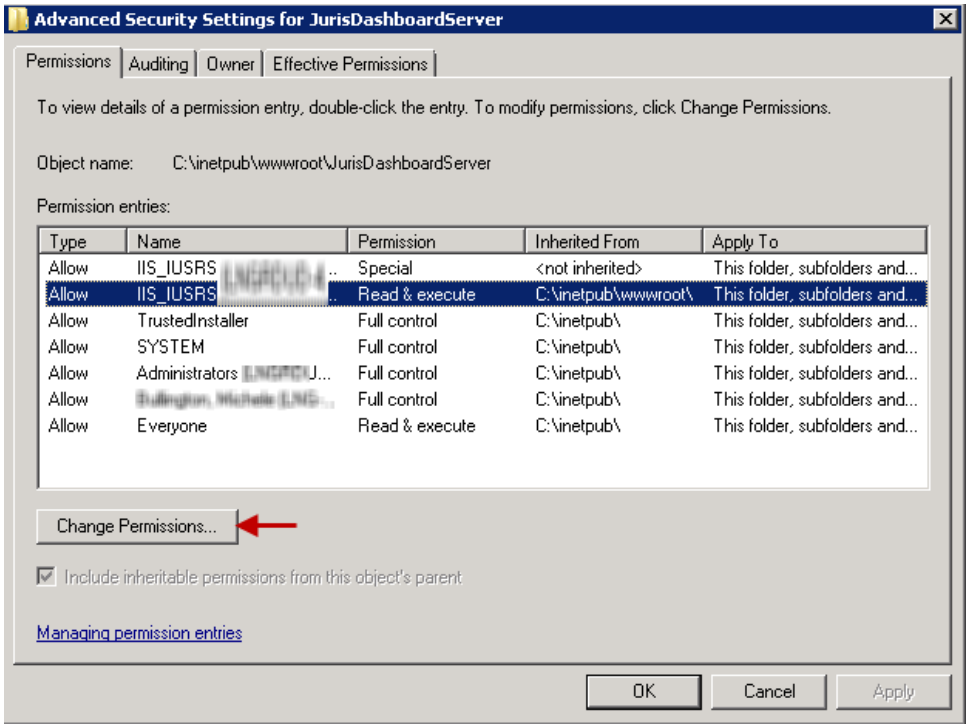


23. Select the **Security Tab**.

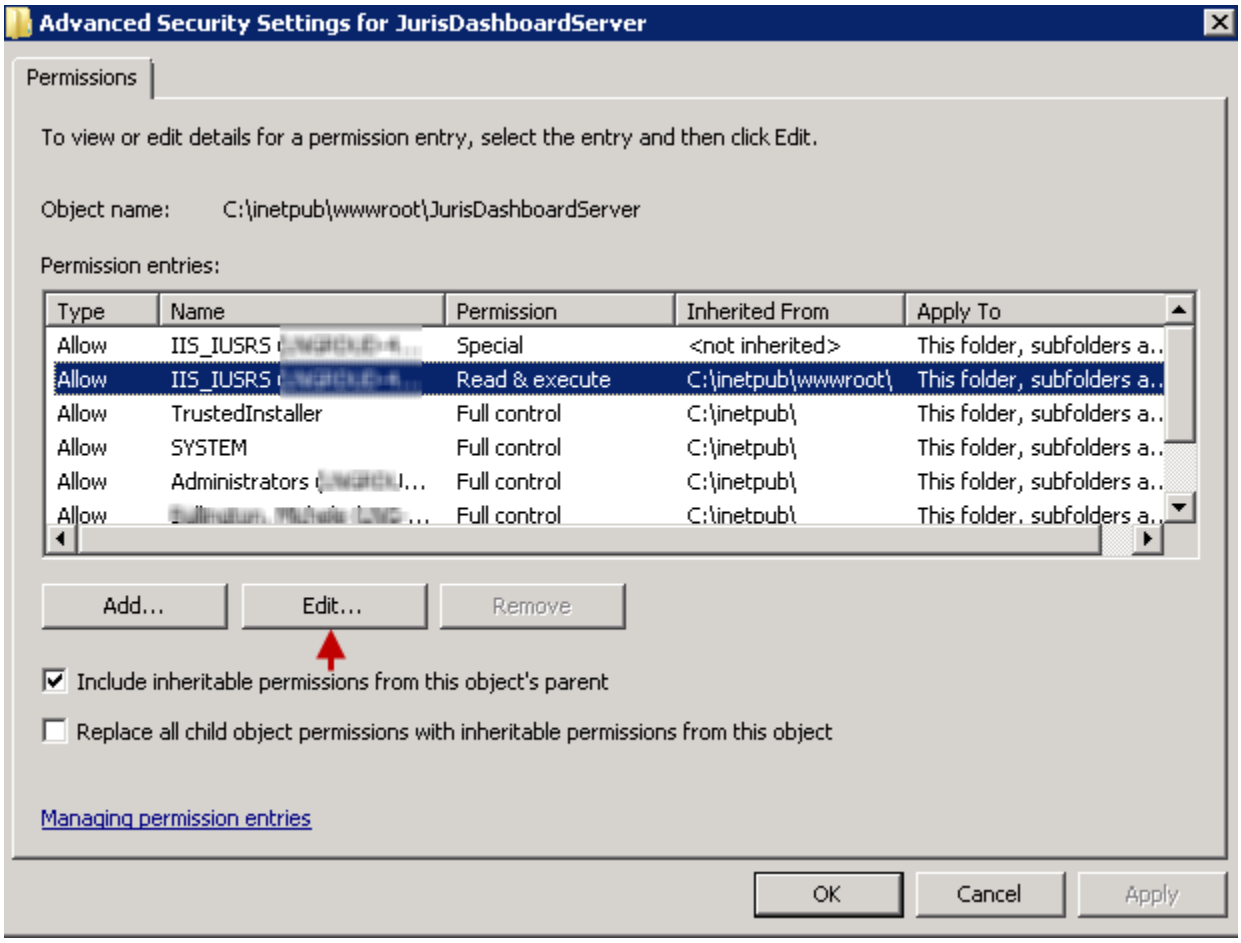
24. Click the ***Advanced*** button.



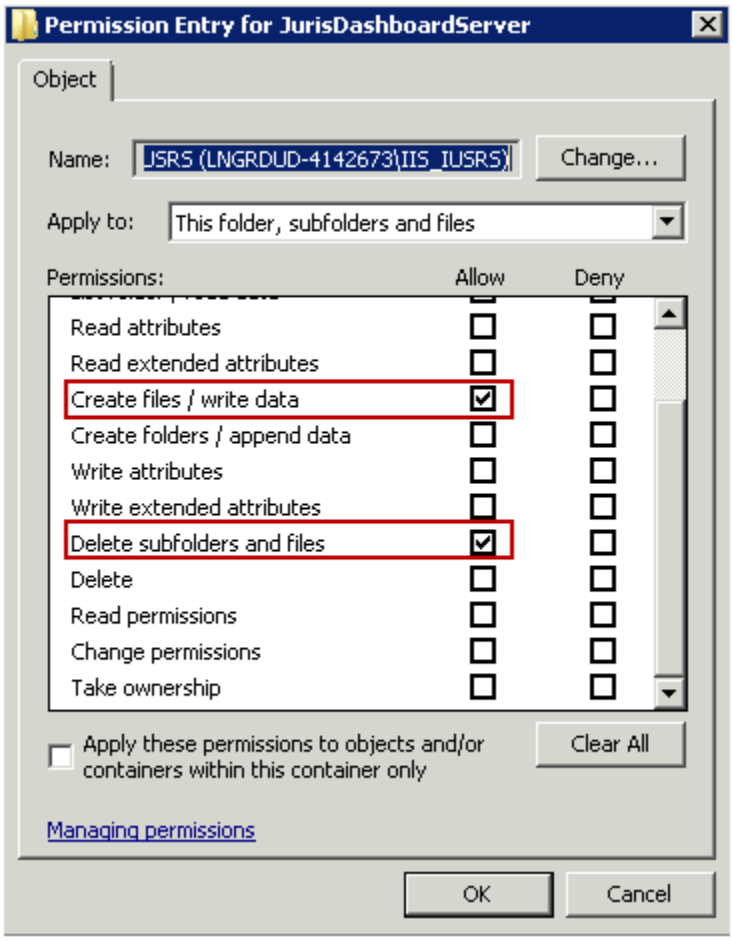
25. Select IIS_IUSRS as indicated below, and click the ***Change Permissions*** button.



26. Select the same IIS_IUSRS entry and click the ***Edit*** button**.**

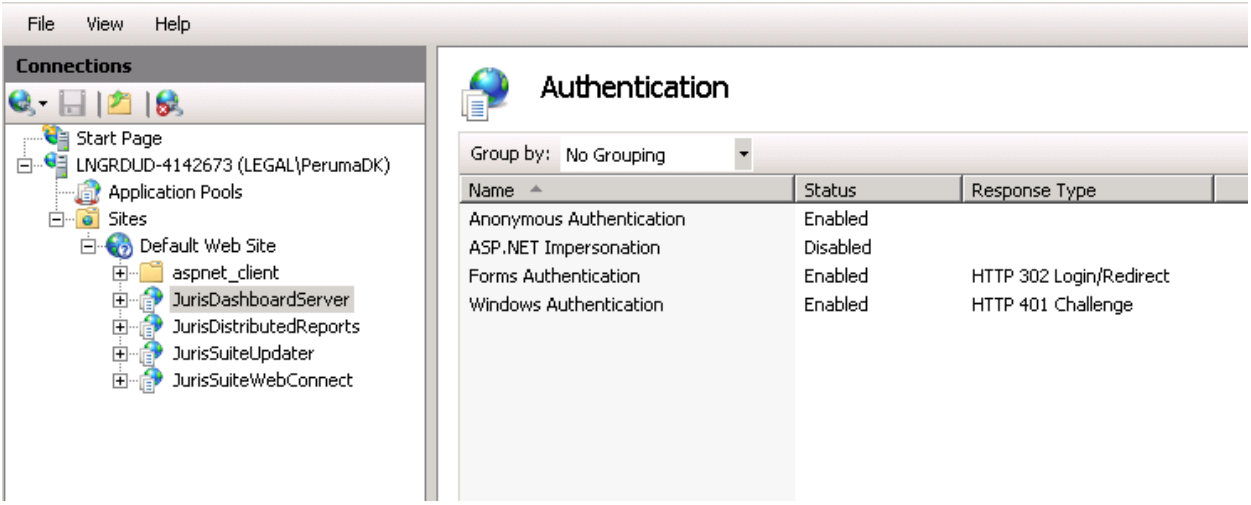


27. Ensure the **Create files / write data** and **Delete subfolders** and files is set to '**Allow'**



28. Click the ***OK*** button. Click the ***OK*** button on each of the open windows.

29. For theJurisDashboardServer, ensure **Anonymous Authentication**, **Forms Authentication** and **Windows Authentication** are enabled.

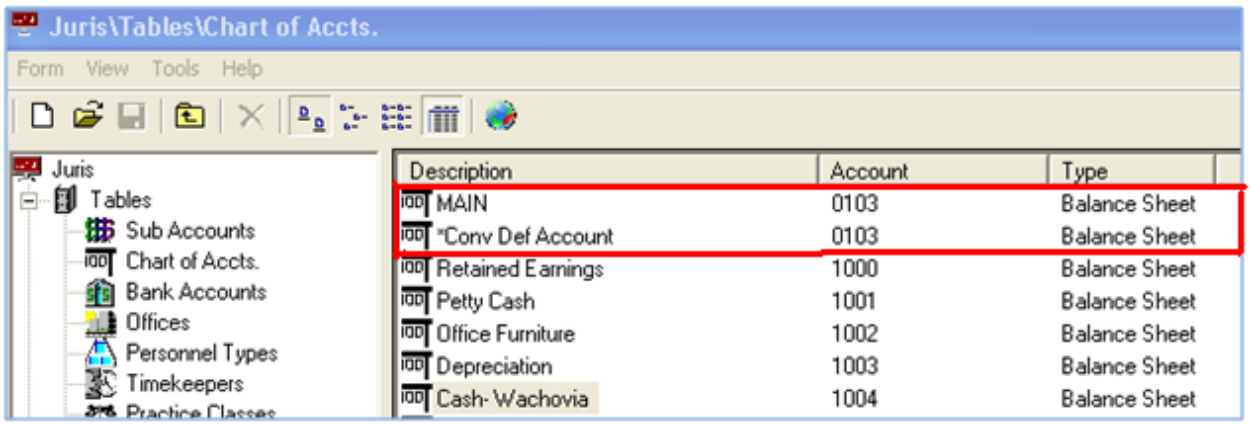


30. Ensure the C:\inetpub\wwwroot\JurisDashboardServer\" folder has full access to **Network Services**

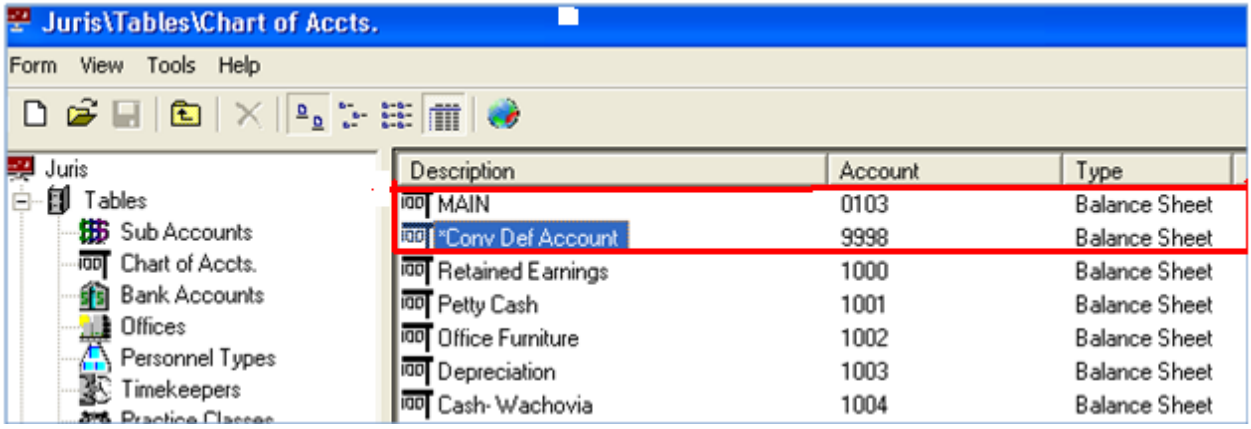
31. Exit IIS Manager.

IIS7 Configuration is completed.

*****NOTE*** There is a potential issue for some clients that must be addressed before they deploy their database to 2.4. If there is a Conf Def Account present, it may conflict with an existing Chart of Account number the customer may have in place. See below.**



Before deploying, one of the duplicate accounts must be re-numbered so that there are no duplicates. See below. Failure to do this will cause a failed deployment. Once this is done, please proceed with deployment.



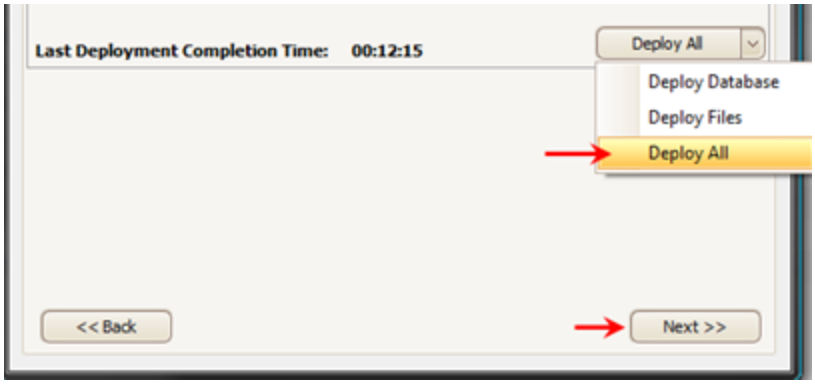
Deploying JurisSuite Updates

30. Start **JurisSuite Deployment Manager** by going to **Start>All Programs>Juris> JurisSuite Deployment Manager**

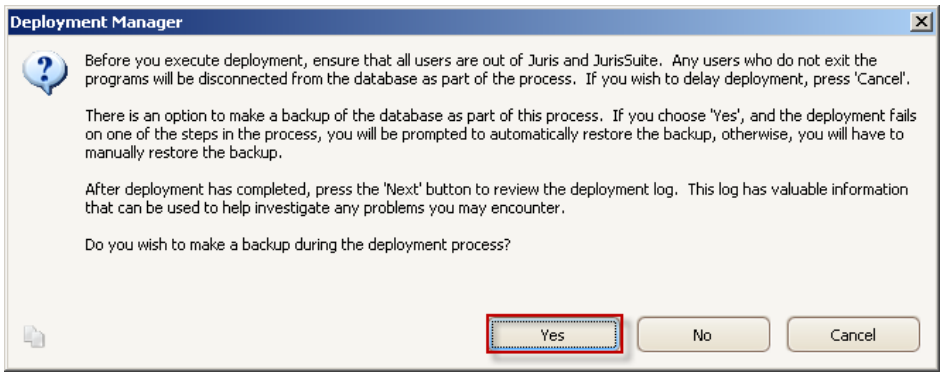
31. Click the **Next** button at the bottom to proceed with the Deployment phase.

32. The **Deploy** button has three choices. Accept the default of '**Deploy All**'. This will ensure all of the components are updated properly. Using the '**Deploy Database**' can be used to simplify the process for clients that have multiple databases. Each database must be deployed with the updates. Using the '**Company'** combo box on the initial

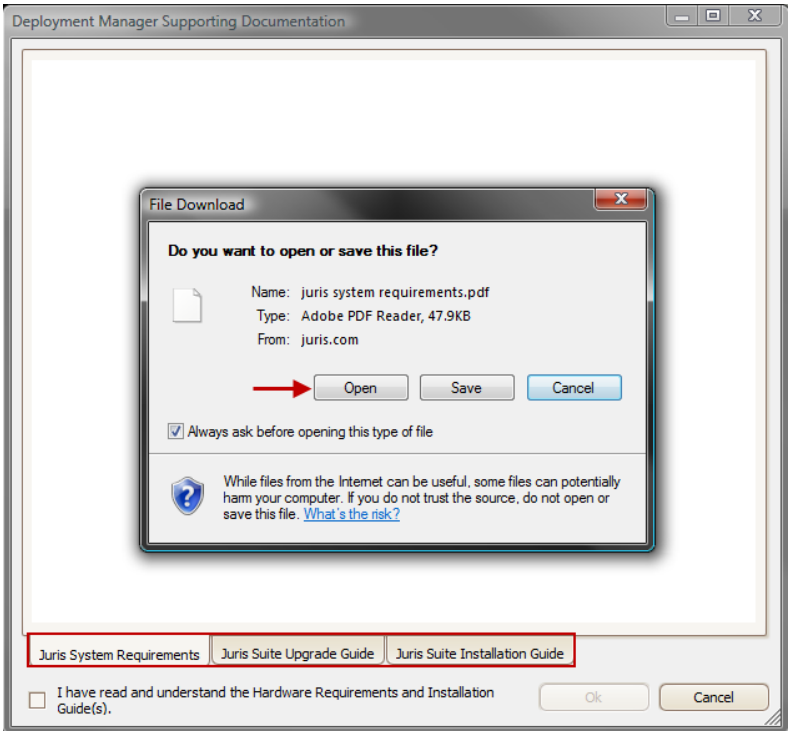
Deployment Manager page allows for database selection.



33. A window will display providing you with advice and the inquiry as to whether or not you want to make a **Backup** of the database during the deployment. Click the ***Yes*** button.



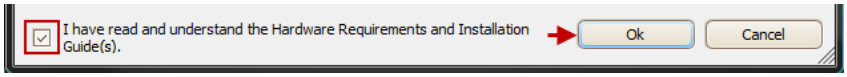
34. The next screen is a review of documents (including this one) and acceptance of the review. Included are the ***Juris System Requirements***, the ***JurisSuite Upgrade Guide***, and the ***JurisSuite Installation Guide.*** Read the appropriate documents



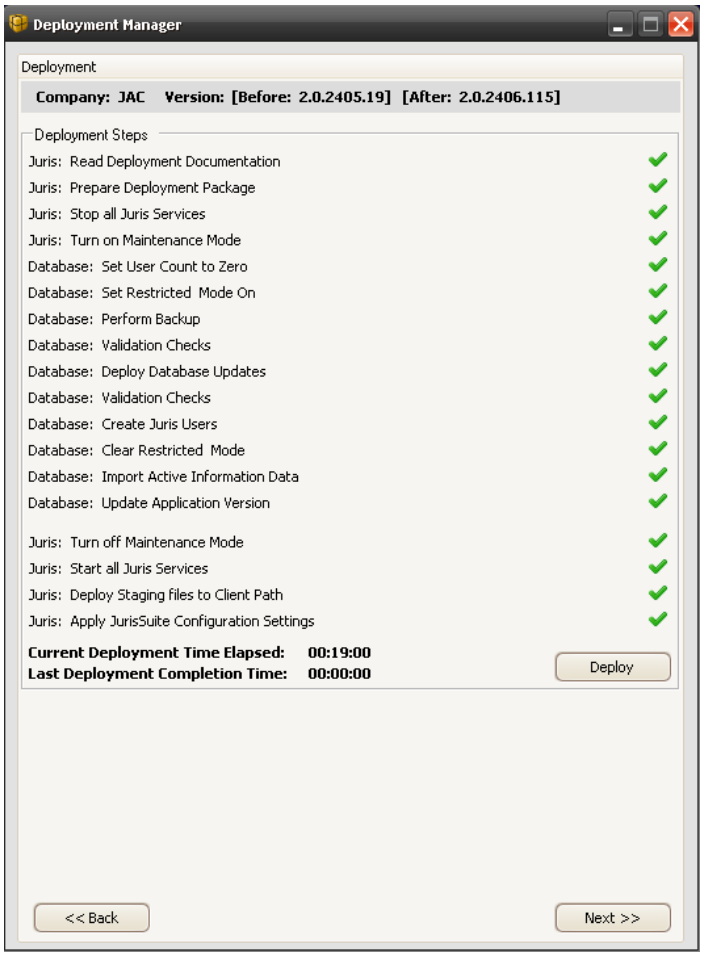
.

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

35. Click inside the checkbox for '**I have read and understand the System Requirements and Installation Guide(s)'**



36. Click the ***OK*** button. The deployment will commence and check off the steps as they complete.



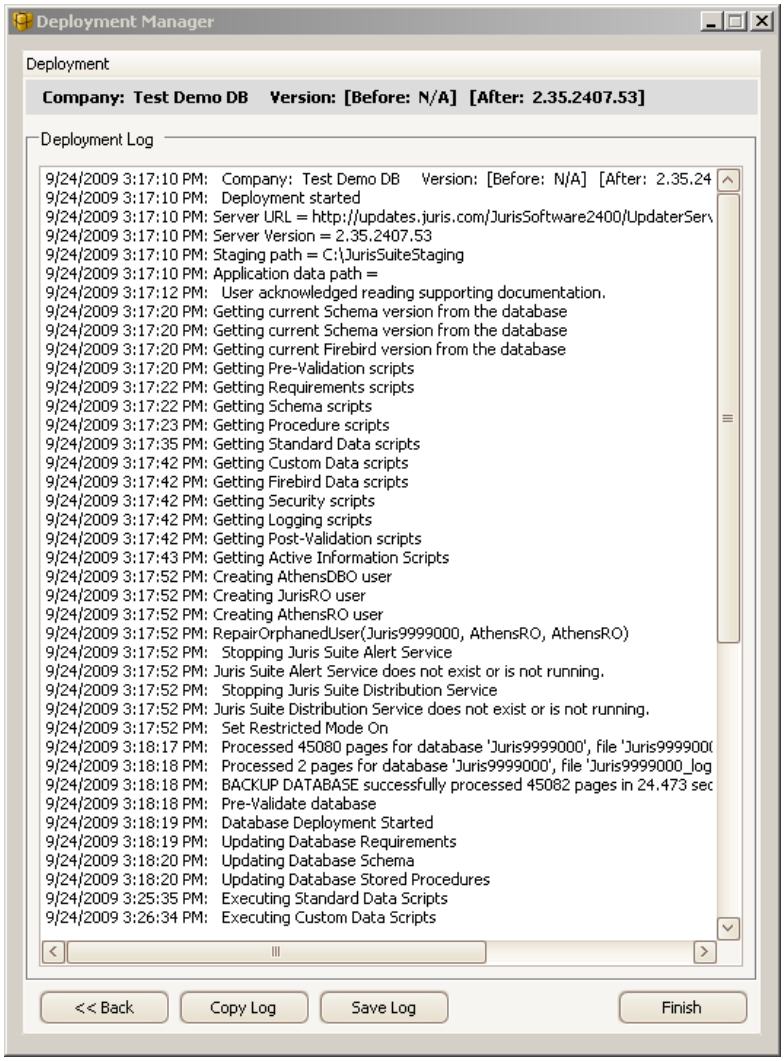
37. When the deployment completes, depending on the outcome you will be prompted for one of these two items. Perform the step below that corresponds with the screen.

a. If deployment is successful, click **Yes** to the prompt to delete the backup created. Continue to **step 45**.

b. If deployment failed, click **Yes** to restore the backup created. After restoring, follow **step 46** and be sure to save the error log and call **Juris Support** at **877-377-3740.**

A deployment summary will disclose all the tasks that finished without error or with error.

38. Click the ***Next*** button. The **Deployment Log** window will appear.



39. If you want to save a version of the log, click the ***Save Log*** button. This will prompt you to save the log file with a .txt file extension. You can also use the ***Copy*** button if you want to send the contents of the log to the **Clipboard**. Click the ***Finish*** button when complete.

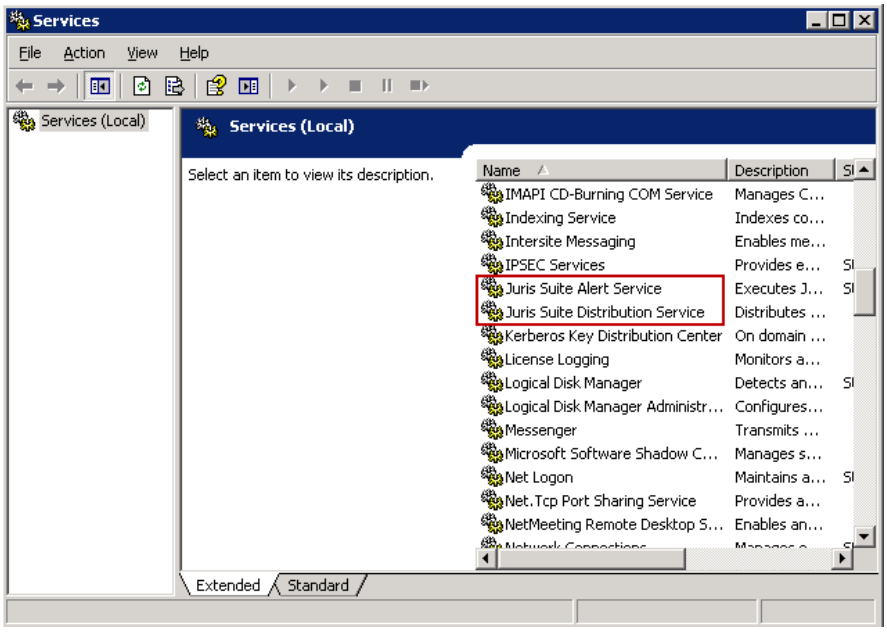
40. Click **Yes** to exit **Deployment Manager**.

Configuring and Starting JurisSuite Services

This is a requirement for the **JurisSuite Business Intelligence** and **JurisSuite Core Reporting** Snap Ins to function properly. Skip this section if both of these modules were not purchased.

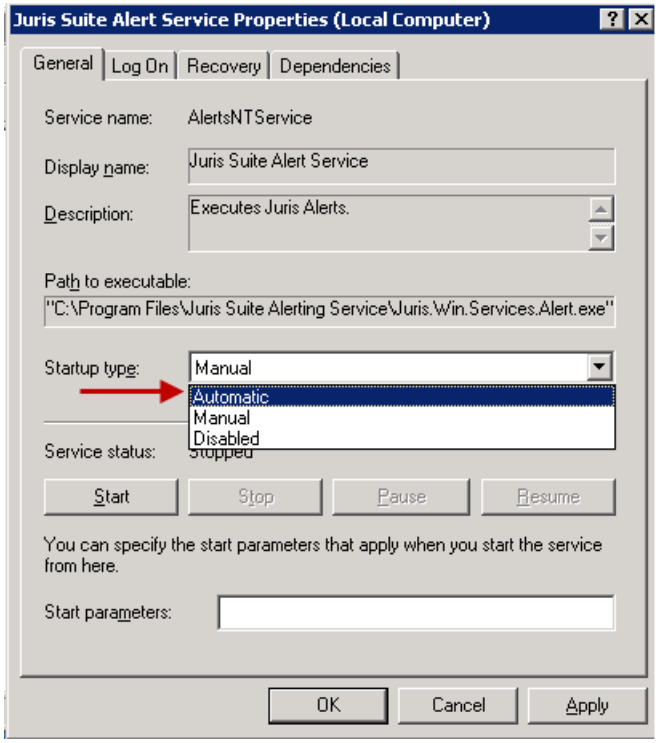
41. Open services by going to **Start> All Programs> Administrative Tools> Services.**

42. Scroll down to the **JurisSuite Alert Service** and **JurisSuite Distributions Service**. First we'll configure and start the JurisSuite Alert Service.



43. Double click the ***JurisSuite Alert Service*** to bring up the **JurisSuite Alert Service Properties** window.

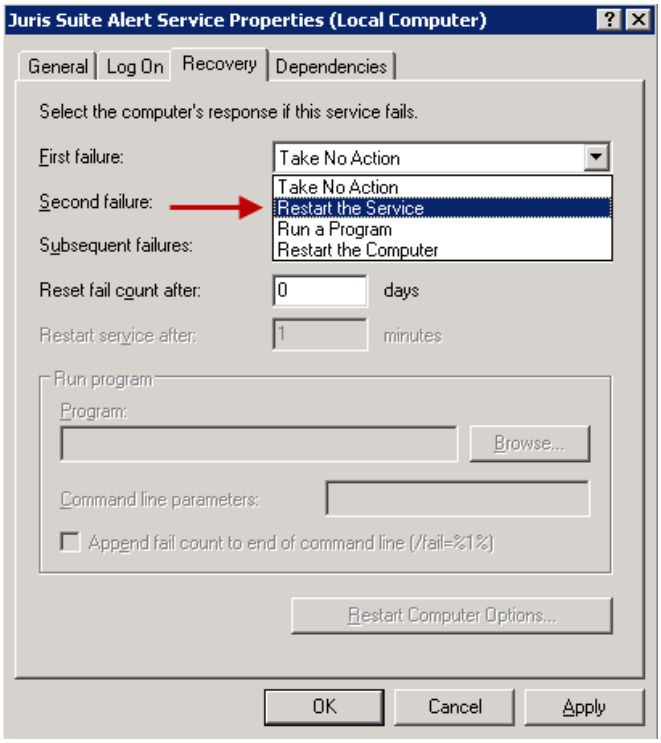
44. In the **Startup type** drop down, select ***Automatic***



45. Click the ***Start*** button to start the service.

46. Click on the ***Recovery*** tab at the top.

47. For **First Failure**, **Second Failure** and **Subsequent failures**, click on the drop down menu and select ***Restart the Service***.



48. Click the ***OK*** button to close out of the properties and accept changes.

49. Repeat **Steps 43 through 48** using the **JurisSuite Distribution Service**.

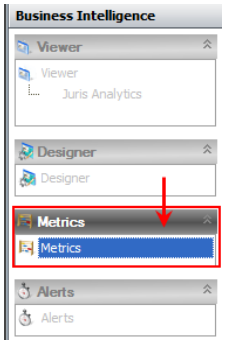
Publish the JurisSuite Dashboard Metrics

This is a requirement for **JurisSuite Business Intelligence** Snap In to display data in the dashboards. Skip this section if the module was not purchased.

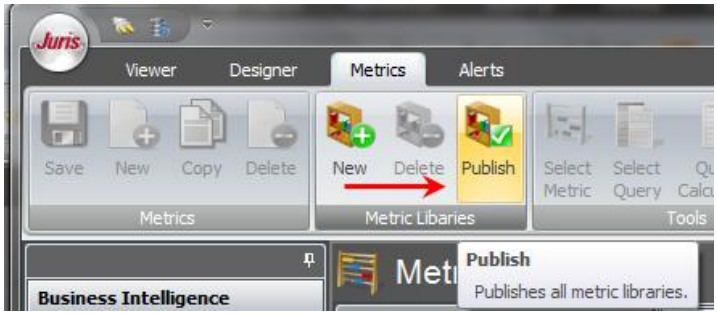
1. Log into **JurisSuite** as **SMGR.**

2. Click on the **Business Intelligence** snap in.

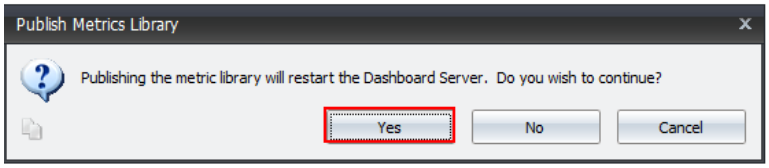
3. Click on the **Metrics Tab**.



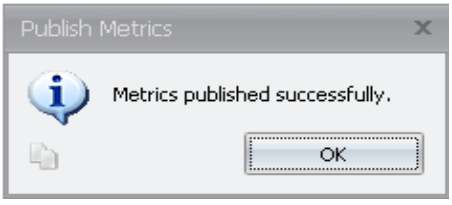
4. Click **Publish** on the **Metric Libraries** tool ribbon.



5. Click the ***Yes*** button to proceed.



6. Click **OK** after the Metrics have been published.

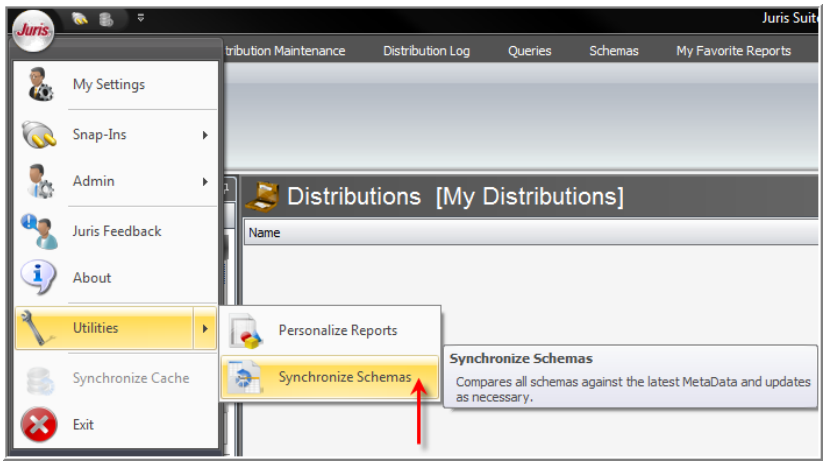


Synchronize Schemas

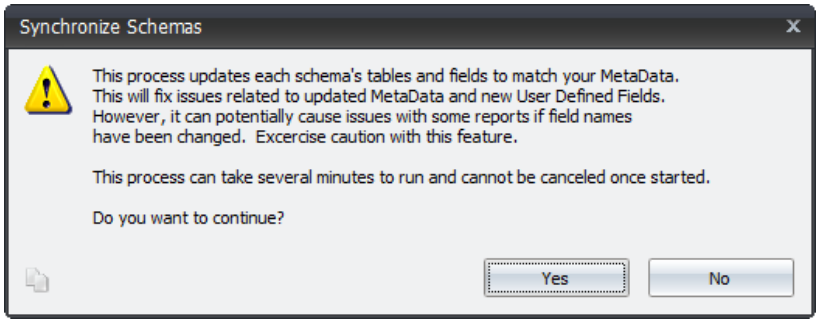
This is a requirement for **JurisSuite Core Reporting** Snap In to display data in the reports. Skip this section if the module was not purchased.

1. Log In to **JurisSuite** as **SMGR**.

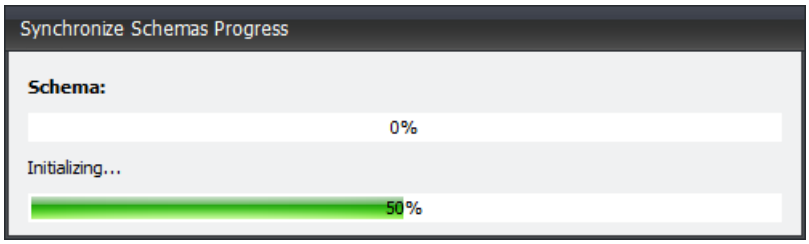
2. Select the **Synchronize Schemas** function from the **Utilities** menu item.



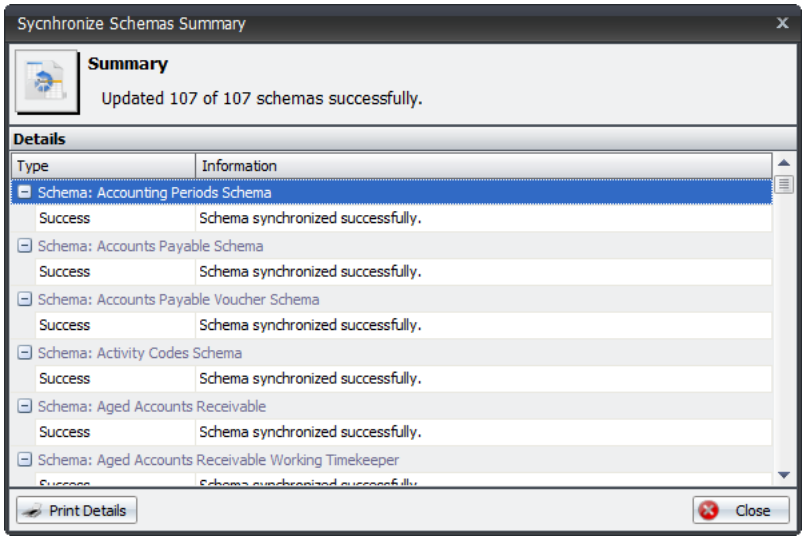
3. The **Synchronize Schemas** window will appear explaining the conditions of the function and whether you want to continue.



4. The process will begin and a status window will be displayed.



Upon completion, a summary window will appear.



5. You can click the ***Print Details*** button to print out the finished report.

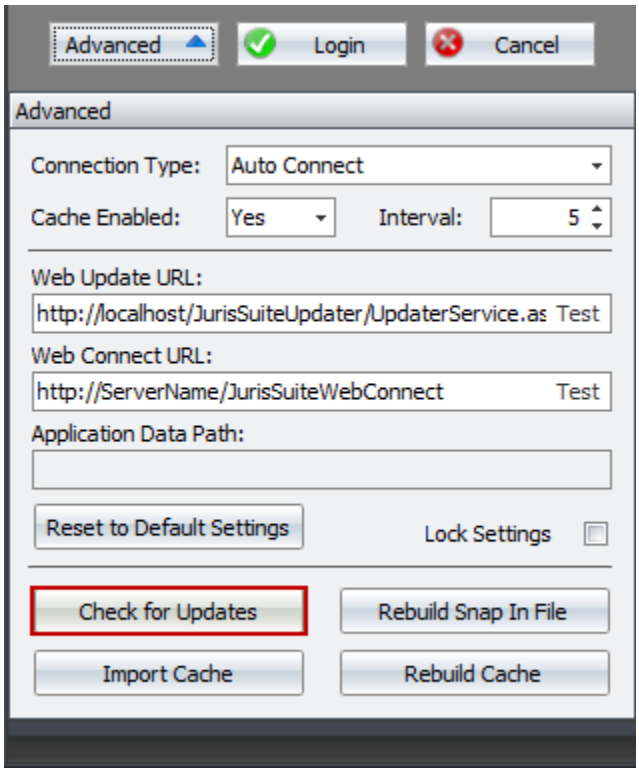
6. Click the ***Close*** button when finished.

Client

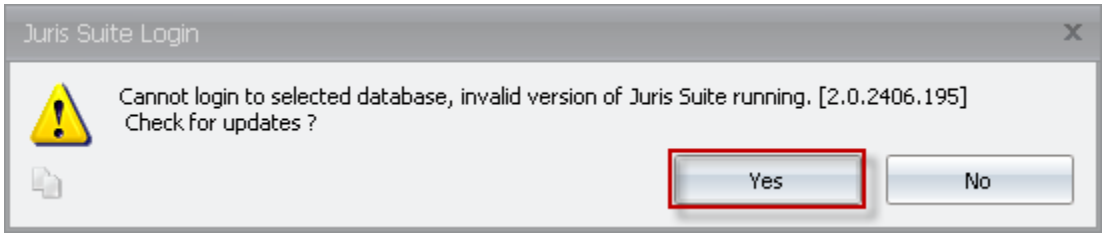
Upgrade JurisSuite Client

Upon successful completion of the JurisSuite Server Upgrade, each individual client running the JurisSuite Client application will update automatically upon initial login. However, manual upgrading before sign on can be performed by following these steps.

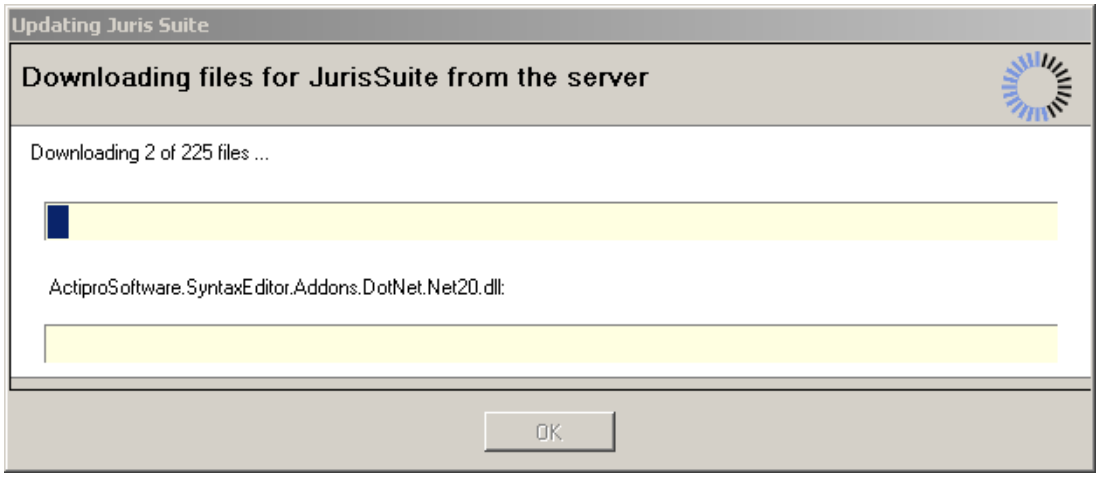
1. Click the **Check for Updates** button.



2. Click **Yes** to the Check for Updates prompt.



If the server is configured properly, the application will find the update and begin downloading.



3. Once finished, the application will restart itself and the user may log into JurisSuite.

Conclusion of JurisSuite Upgrades for 2405 and higher Versions

This concludes the upgrade of JurisSuite for 2405 and higher versions. It is not necessary to perform any settings or permissions changes after upgrading to this version.