

CASE NOTEBOOK APPLICATION SUITE SQL SERVER 2019 MIGRATION

INSTALLATION AND TROUBLESHOOTING GUIDE

Version 5.8
August 2024

Customer Service

Technical Assistance

If you have general, research, or technical questions about Thomson Reuters Case Notebook, call Customer Technical Support at 1-800-290-9378. You can also visit our contact page at <https://legal.thomsonreuters.com/en/contact>.

If you're researching an area of law you are unfamiliar with, it's not without its speed bumps. That's why we offer our customers free, unlimited, 24/7 access to Reference Attorneys, the industry's premier team of legal research assistance professionals. For research help, call the Reference Attorneys at 1-800-REF-ATTY (1-800-733-2889).

Billing and Account Assistance

For billing and account assistance, call Customer Service at 1-800-328-4880 or email customerservice@thomsonreuters.com. Billing and account assistance is also available online at <https://legal.thomsonreuters.com/en/support>.

Reference Materials

For free reference materials, visit the Product support section at <https://legal.thomsonreuters.com/en/support>. Our products also contain comprehensive, searchable instruction available via the **Help** menu in the application.

Disclaimer

Thomson Reuters disclaims any and all liability arising from the use of this document and does not guarantee that any information contained herein is accurate or complete. This document contains information proprietary to Thomson Reuters and may not be reproduced, transmitted, or distributed in whole or part, in any form or by any means, without the express written permission of Thomson Reuters.

The example companies, organizations, products, domain names, email addresses, logos, people, places, and events depicted herein are fictitious. No association with any real company, organization, product, domain name, email address, logo, person, place, or event is intended or should be inferred.

Information in this guide is current through August (version 5.8).
Westlaw, Case Notebook, RealLegal, E-Transcript, E-Transcript Bundle Viewer, KeyCite, LiveNote, LiveNote Stream, RealLegal iBinder, RealLegal MediaSync, E-Transcript Manager, E-Transcript Reporter Edition are either registered trademarks or trademarks of Thomson Reuters in the United States and/or other countries. Other product and company names mentioned herein may be the trademarks of their respective owners.

© 2024 Thomson Reuters. All rights reserved.
610 Opperman Drive
Eagan, MN 55123-1396

Contents

1	INTRODUCTION.....	2
2	IDENTIFYING YOUR EXISTING SQL SERVER ENVIRONMENT	3
	Method 1: From the SQL Server Configuration Manager	3
	Method 2: Through the Program File Folder	4
	Migration Guidelines for your existing SQL Server Environment	4
	Scenario: Using a 64-bit Instance of SQL Server	4
	Scenario: Using a 32-bit Instance of SQL Server	7
3	MIGRATING REPOSITORIES.....	8
4	MIGRATING CASES	14
5	BEST PRACTICES AFTER REPOSITORY MIGRATION.....	17
	Changing Client Repository after Migration	17
	Method 1: Manually removing Old Repository and add New Repository.....	17
	Method 2: Using the Export Settings feature in Manage Repositories.....	17
	Method 3: Allowing Clients to automatically detect New Repository	19
	Updating Repository in other Case Notebook Administration Installations	21
	Deleting Old Repository	21
6	TROUBLESHOOTING.....	24
	Scenario: Repository Migration stops responding before Completion	24
	Scenario: Case Migration stops responding before Completion	28
	Scenario: Repository Migration fails due to Missing Case Files.....	30
	Scenario: Error occurs if Microsoft OLE DB Driver 18.6.5 or 18.6.7 is installed on Machine	33

1 Introduction

Case Notebook version 5.8 uses Microsoft SQL Server 2019 Express, a powerful, reliable, and modern SQL for data storage and retrieval. Prior versions of Case Notebook came with Microsoft SQL Server 2014 which is no longer supported by Microsoft as of July 2024.

The following SQL Servers are supported:

- Microsoft SQL Server 2016
- Microsoft SQL Server 2019
- Microsoft SQL Server 2022

If Case Notebook detects that your current repository resides on a SQL Server instance that is outdated, then upon log in, you will be prompted to upgrade your repository to the current version of SQL Server for improved security and performance via a built-in migration tool.

This guide provides instructions and troubleshooting tips for the repository and case migration process. For more information about installing products belonging to the Case Notebook application suite, consult the **Case Notebook Application Suite Installation Guide** at <https://legal.thomsonreuters.com/content/dam/ewp-m/documents/legal/en/pdf/product-download-documents/case-notebook-suite-installation-guide.pdf>.

2 Identifying your existing SQL Server environment

Before starting the migration process, it is important to identify your existing SQL Server environment. You can do this from the SQL Server Configuration Manager or through the Program file folder.

Method 1: From the SQL Server Configuration Manager

To view the details of the version and edition from the SQL Server Configuration Manager:

1. Open **SQL Server Configuration Manager** on your machine. Note that this tool is only available in Windows operating systems.
2. Select **SQL Server Services** from the left pane, then select SQL Server on the right pane (Figure 1), and choose **Properties** from the dropdown menu. A dialog box named **SQL Server (WESTREPOSITORY) Properties** opens.

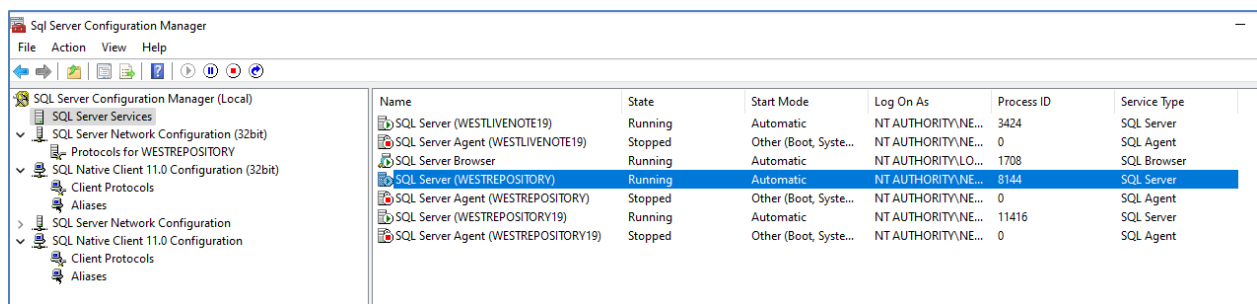


Figure 1

3. Click the **Advanced** tab. You can see various SQL Server configuration parameters here, such as the SQL Server edition in the **Stock Keeping Unit Name** text box and the version number in the **Version** text box (Figure 2).

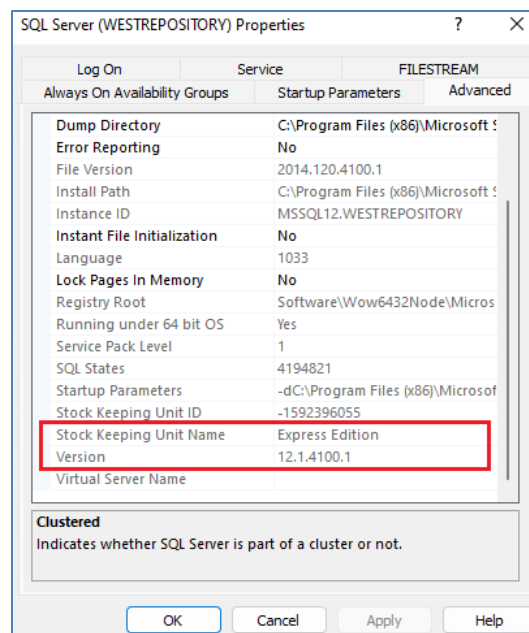


Figure 2

Method 2: Through the Program File Folder

The directory structure for a SQL Server named instance that includes the Database Engine and Analysis Services, named "MyInstance", and is installed to the default directories, would be the following:

- C:\Program Files\Microsoft SQL Server\MSSQL{nn}.MyInstance\
- C:\Program Files\Microsoft SQL Server\MSAS{nn}.MyInstance\

Version	*nnn*	{nn}
SQL Server 2022 (16.x)	160	16
SQL Server 2019 (15.x)	150	15
SQL Server 2017 (14.x)	140	14
SQL Server 2016 (13.x)	130	13
SQL Server 2014 (12.x)	120	12
SQL Server 2012 (11.x)	110	11

Note: The repository installer in Case Notebook version 5.7 and earlier came with a named SQL instance i.e. **WESTREPOSITORY**, which was installed on SQL Server 2014 Express (32-bit). You may have a custom named or default SQL instance instead of **WESTREPOSITORY**.

Migration Guidelines for your existing SQL Server Environment

Once you have validated the version and bitness of your SQL Server instance, use the following guidelines to proceed.

SCENARIO: USING A 64-BIT INSTANCE OF SQL SERVER

If you are using a 64-bit SQL server instance that is 2014 or older, Case Notebook Administration displays a message prompting you to upgrade at your earliest convenience (Figure 3). It is recommended that you upgrade your SQL server instance using the Microsoft® SQL Server installer for SQL Server 2016 or higher. Migration is not required in this scenario.



Figure 3

However, if you still choose to migrate using the built-in migration tool, you will need to install a new instance. It is strongly recommended that you download and run the Case Notebook Repository from <https://legal.thomsonreuters.com/en/support/software-downloads/case-notebook/repository>. This repository can be installed on the same Windows system where an existing repository also resides. The installer automatically configures a correct SQL Server 2019 Express instance for Case Notebook. If you want to install a new custom SQL instance, then use version 2016 or higher.

To configure a custom SQL instance:

During the installation of the desired version of SQL Server, when the **Instance Configuration** dialog box is displayed, select **NAMED INSTANCE** and provide the name for the new SQL instance where the repository will reside. In this example (Figure 4), the name is **WESTREPOSITORY19**.

Instance Configuration

Specify the name and instance ID for the instance of SQL Server. Instance ID becomes part of the installation path.

Global Rules
Product Updates
Install Setup Files
Install Rules
License Terms
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete

☐ Default instance
☒ Named instance:

Instance ID:

SQL Server directory: C:\Program Files\Microsoft SQL Server\MSSQL15.WESTREPOSITORY19

Installed instances:

Instance Name	Instance ID	Features	Edition	Version
WESTLIVENOTE	MSSQL12.WESTLIV...	SQL Engine	Express	12.3.6024.0
WESTREPOSITORY	MSSQL12.WESTREP...	SQL Engine	Express	12.3.6024.0

Figure 4

It is best practice to run the instance’s **Engine Service** under a domain account that will also have full access to the flat file location for **.LNS** and **.DIR** data to improve performance for indexing and search. This can be changed later. In this example, **NETWORK SERVICE** is chosen as the built-in account (Figure 5).

Service Accounts Collation

Microsoft recommends that you use a separate account for each SQL Server service.

Service	Account Name	Password	Startup Type
SQL Server Database Engine	<<Browse...>>		Automatic
SQL Server Browser	NT AUTHORITY\LOCALS...		Disabled

Select User, Computer, Service Account, or Group

Select this object type:
User, Service Account, Group, or Built-in security principal

From this location:
Entire Directory

Enter the object name to select (examples):

OK Cancel

Figure 5

Select the **Collation** tab and ensure that the collation being used is **SQL_Latin1_General_CP1_CI_AS** as shown in Figure 6. This should be the default if the customer is in the United States.

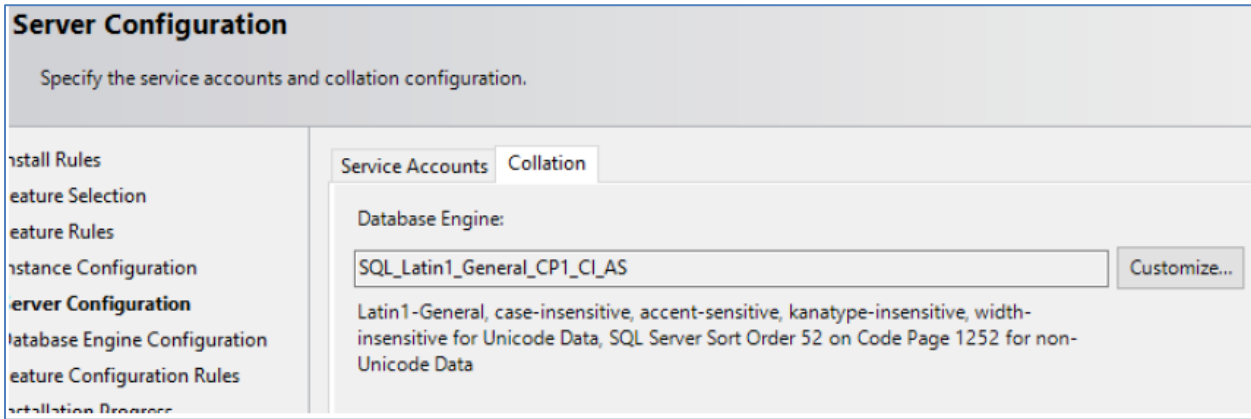


Figure 6

In the **Database Engine Configuration** dialog box, it is best practice to choose **Mixed Mode** as opposed to **Windows Authentication** to ensure that there is a viable way into the instance beyond the specific user who is installing the instance. At this time, you can choose a password for the SQL System Administrator (SA) account, but a default password is recommended. You can also choose to add additional domain accounts that will be allowed administrator access via Windows authentication.

Make note of the database file storage location. In this example, the default location for SQL Server 2019 is **C:\Program Files\Microsoft SQL Server\MSSQL15.WESTREPOSITORY19\MSSQL\DATA**.

To configure the Transmission Control Protocol (TCP):

1. Open **SQL Server Configuration Manager**.
2. Select **SQL Server Network Configuration**. **Note:** Do **not** select SQL Server Configuration 32- bit.
3. Select **Protocols for WESTREPOSITORY19** (or the name of the instance which was just installed).
4. Enable **Named Pipes** and **TCP/IP** as shown in Figure 7.

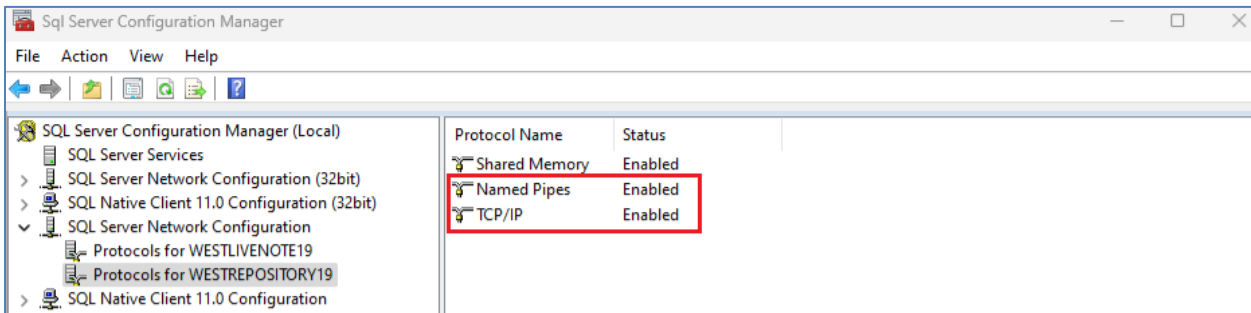


Figure 7

SCENARIO: USING A 32-BIT INSTANCE OF SQL SERVER

If you are using a 32-bit SQL instance, Case Notebook Administration displays a message (Figure 8) prompting you to upgrade your repository to the current version of SQL Server.

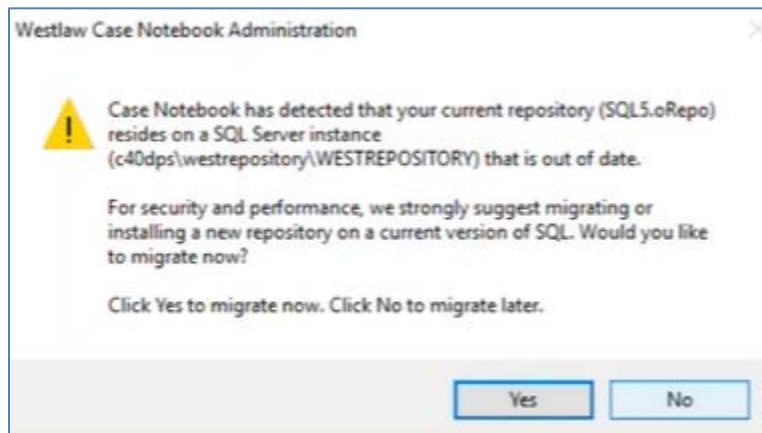


Figure 8

Before proceeding with the repository and case migration process, ensure the following:

- All users are out of the cases to be migrated.
- Any offline work is replicated online to avoid losing data. Once migration is done, it won't be possible to connect to the old repository as it will be disabled (grayed out) by the configuration file.
- The existing SQL Server and Repository environment is identified.
- You have administrator rights for the system where the SQL Server instance is installed.

Note: If you are using Case Notebook version older than 4.5, you must upgrade to Case Notebook version 4.7 or higher. This is because the Case Notebook 5.8 repository and built-in case migration tool doesn't support cases older than version 4.5.

3 Migrating Repositories

1. Follow the steps in the installation wizard (Figure 9) to install Case Notebook version 5.8.

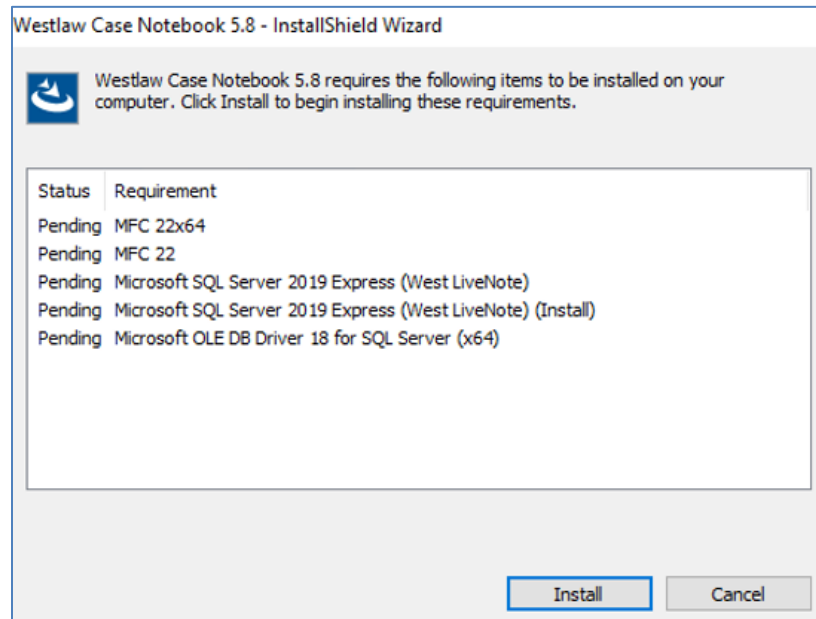


Figure 9

Note: Sometimes, you may be required to reboot in order to complete the setup (Figure 10). Click **OK** to reboot the machine, then log in, and restart the installation wizard.

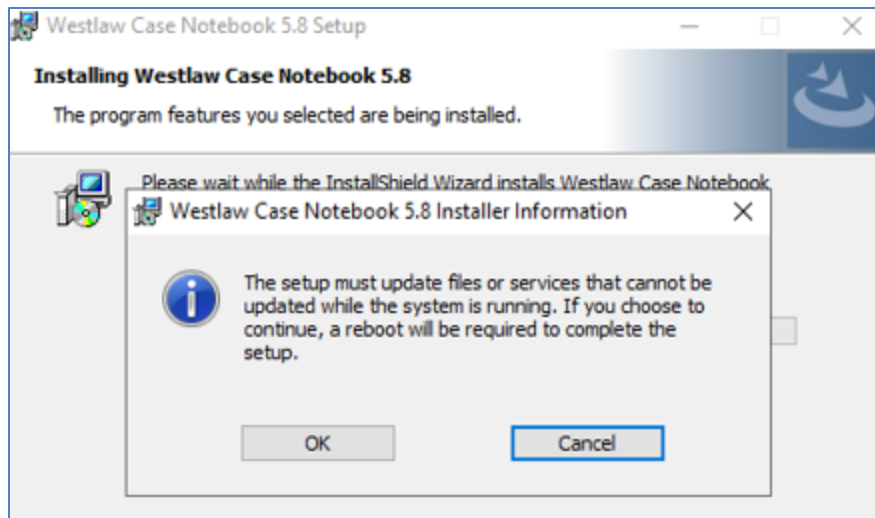


Figure 10

Important! If you already have an existing SQL Server installation or application which uses any 18.x version of Microsoft® OLE DB Driver for SQL Server other than version 18.2.2.0, an error message may be displayed (Figure 11), and the installation of Case Notebook Repository is interrupted.

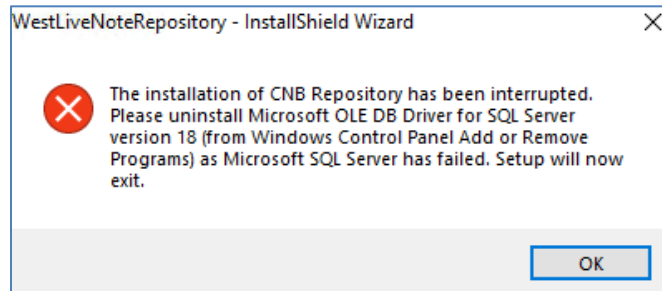


Figure 11

To proceed, uninstall the existing Microsoft OLE DB Driver for SQL Server 18.x from **Add or Remove Programs** in the **Windows Control Panel** and run the installer again.

2. After successful installation, open Case Notebook Administration and connect to the existing repository (Figure 12).

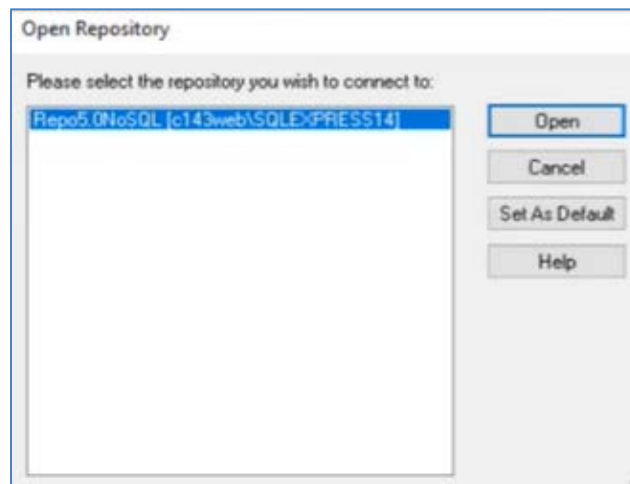


Figure 12

You will be prompted to upgrade your repository to the current version of SQL Server (Figure 13).

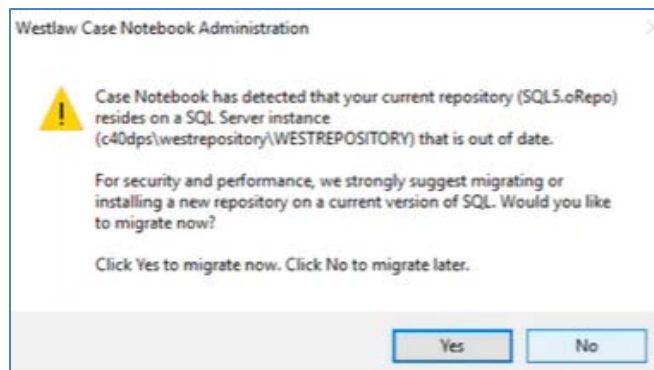


Figure 13

IMPORTANT! If Case Notebook Administration is installed on other systems, after migration, when Case Notebook Administration is launched, the administrator user must skip the migration when prompted and update their repository from the **Repository > Manage** menu. For more information, go to **Help > Help Topics** in Case Notebook Administration.

3. Click **Yes** to start the migration process immediately, or click **No** to do this later at your convenience from the **Repository > Migrate** menu. Note that the **Repository > Migrate** menu item is unavailable (grayed out) when your repositories are up to date.

Note: It is assumed that you have installed a new SQL server instance before starting the migration progress as the instance details are required in the **Repository Migration** dialog box. You can download and run the Case Notebook Repository from <https://legal.thomsonreuters.com/en/support/software-downloads/case-notebook/repository> or install your own instance of Microsoft SQL Server 2016 or higher.

4. If you click **Yes**, a message is displayed to inform you that if you have installed a new SQL instance for repository migration, you need to provide the instance details (Figure 14)

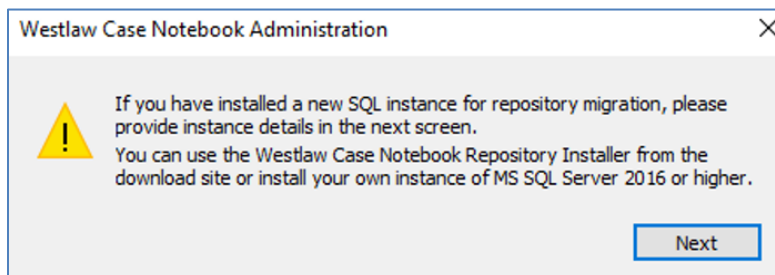



Figure 14

5. Click **Next**. The **Repository Migration Destination** dialog box is displayed.
6. Enter the **SQL Server Host** or click  to browse for the repository server and click **OK**. Then enter the **SQL Server Instance** of an existing SQL Server for repository migration (Figure 15).

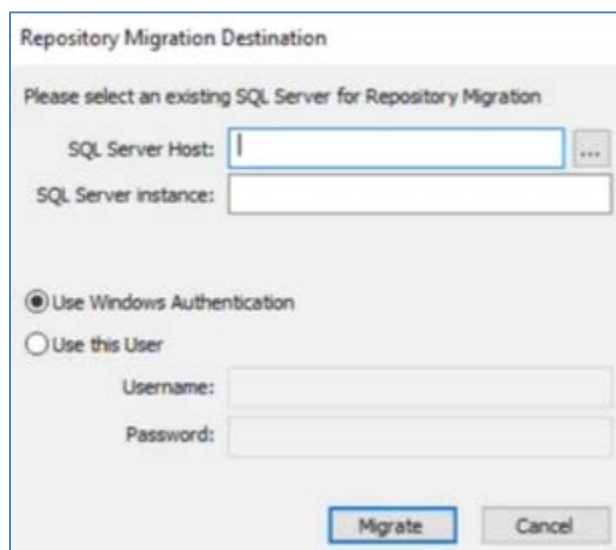


Figure 15

Important! If the specified SQL instance already contains a repository, a warning message is displayed to inform you that if you proceed with the migration to this SQL Server instance, then the existing repository will be replaced resulting in data loss. If this warning message is displayed, it is strongly recommended that you validate that another administrator user hasn't performed the migration already. Two different administrator users are allowed to perform the same migration on two different machines running Case Notebook Administration. In this scenario, an existing repository from one of the administrator users would be deleted, therefore validation is important.

Once the validation is done, click **Next** to proceed, or click **Back** to return to the **Repository Migration** dialog box and select a different repository.

7. Select **Use Windows Authentication** to authenticate if you are a user in **Active Directory** mode. Alternatively, for custom default and custom instance, select **Use this User**, and enter your **Username** and **Password**.
8. Click **Migrate**. The **Repository Name** dialog box is displayed (Figure 16).

The existing name of the repository you are migrating is populated here by default and is used for the migrated repository. Optionally, you can enter a new name for your migrated repository in **Repository Name**. This repository name is displayed on client machines and the **Manage** menu in Case Notebook Administration. It may be helpful to give a new name to help differentiate the new repository from the old repository in Case Notebook Administration after the migration. You can always rename a repository later.

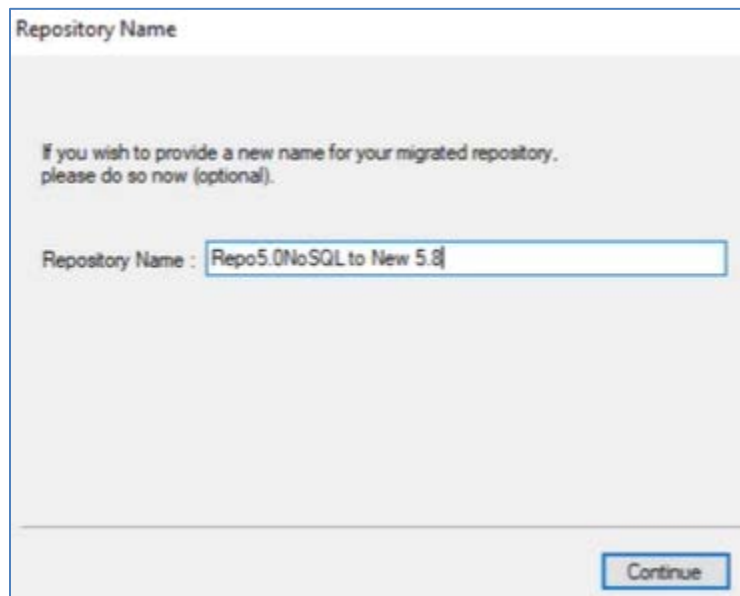
The image shows a dialog box titled "Repository Name". Inside the dialog, there is a message: "If you wish to provide a new name for your migrated repository, please do so now (optional).". Below this message is a text input field with the label "Repository Name :". The input field contains the text "Repo5.0NoSQL to New 5.8". At the bottom right of the dialog box is a button labeled "Continue".

Figure 16

9. Click **Continue** to start the repository migration process. You can view how far along you are in the process via the progress bars (Figure 17 and Figure 18).

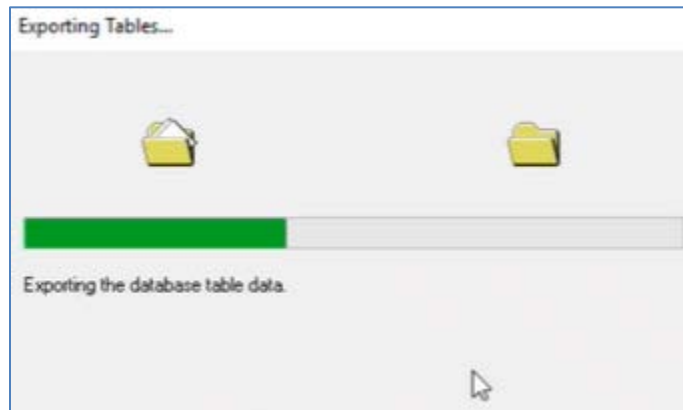


Figure 17

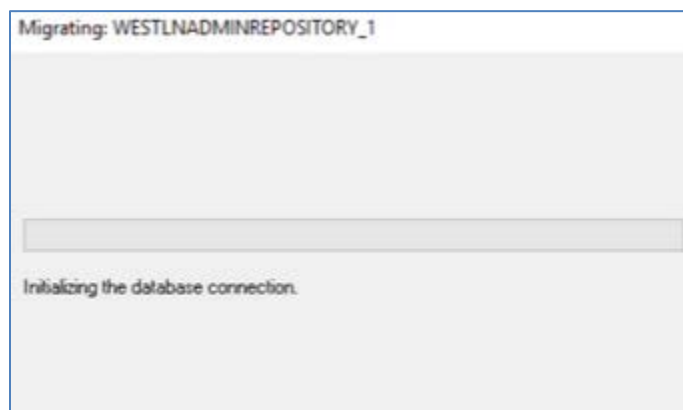


Figure 18

10. Once the repository migration process is complete, you have the option to proceed with case migration immediately by clicking **Yes**, or you may click **No** to do this later. It is strongly suggested that you do the case migration as soon as possible.

Note: The **Repository > Migrate** menu item is unavailable (grayed out) when your repositories are up to date (Figure 19).

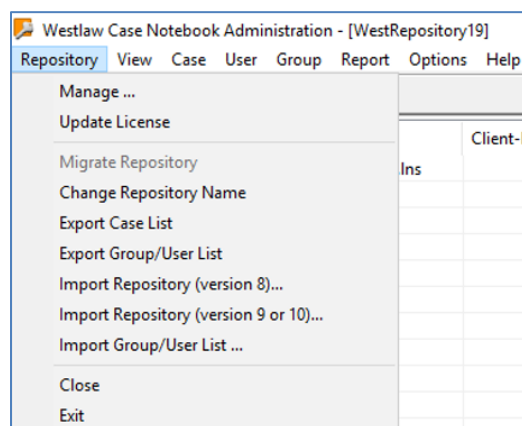


Figure 19

Note: When repositories are migrated, Case Notebook users are presented with the **Repository Update Check** dialog box (Figure 20) to inform them that the repositories in their list may be out of date, and they have the option to check for updated repositories immediately or later when it's convenient for them to do so.

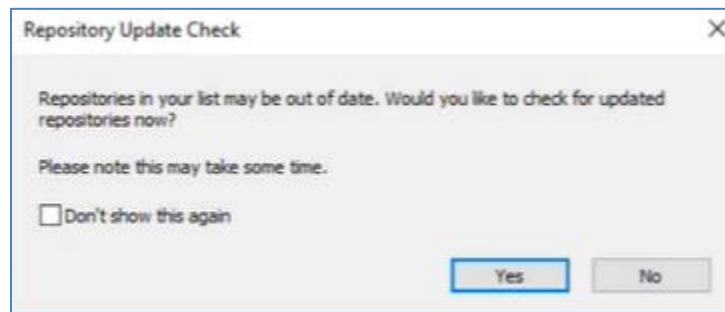


Figure 20

If the repository migration was not successful, a repository uninitialized error message is displayed. Sometimes, the migration process stops responding before completion. If you encounter such issues, refer to the [Scenario: Repository Migration stops responding before Completion](#) section in the [Troubleshooting](#) chapter for instructions to restart the repository migration process.

4 Migrating Cases

After the repository is successfully migrated, you have the option to proceed with case migration immediately by clicking **Yes** on the success message dialog box. If you choose to skip case migration, you will be returned to the new repository and won't see any cases. This is to be expected. You can connect to the old repository from the **Repository > Manage** menu.

You can migrate cases between repositories later by connecting to the old repository, then selecting the **Case > Migrate** menu, and choosing one or more cases for migration (Figure 21).

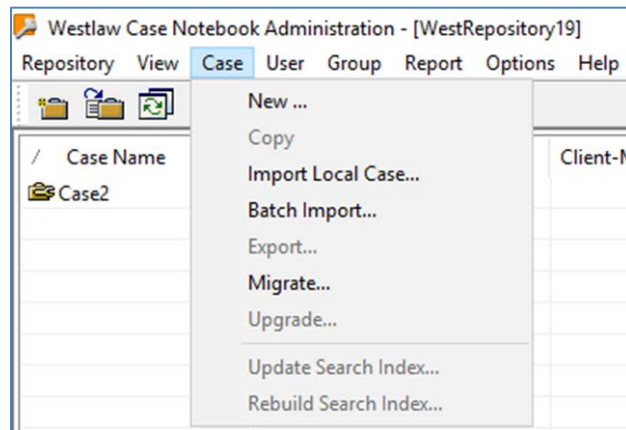


Figure 21

To migrate cases between repositories later from the **Case** menu:

1. Click the **Case** menu and select **Migrate**. The **Please Select Cases for Migration** dialog box is displayed (Figure 22).

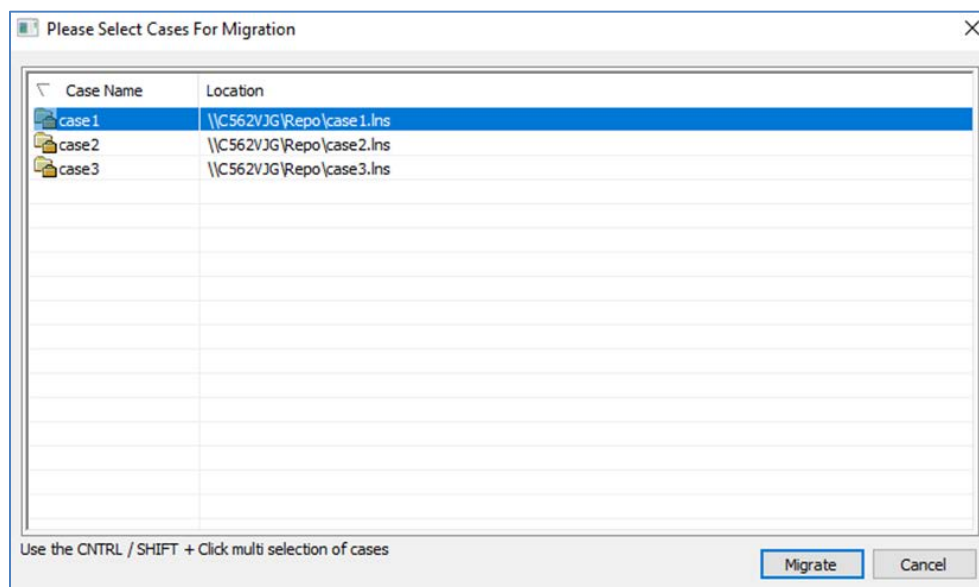


Figure 22

2. Select one or more cases for migration (use **Ctrl +Shift** to select multiple cases) and click **Migrate**. The case migration process begins.
3. Once the case migration process is complete, the **Case Migration Messages** dialog box shows the migration status for the cases (Figure 23).
4. Click **OK** to return to Case Notebook Administration.

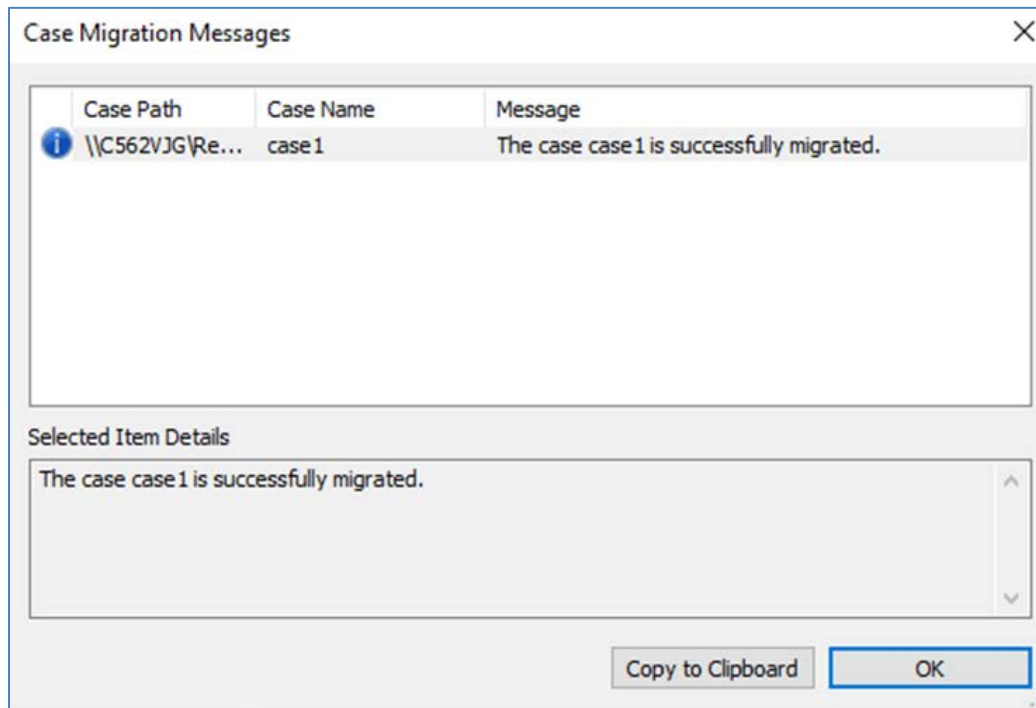


Figure 23

Note: It is strongly suggested that you do the case migration as soon as possible when repositories are migrated. If you attempt to open a case by connecting to the new repository without doing case migration, an error is displayed to inform you that the case database is missing from the SQL server (Figure 24).

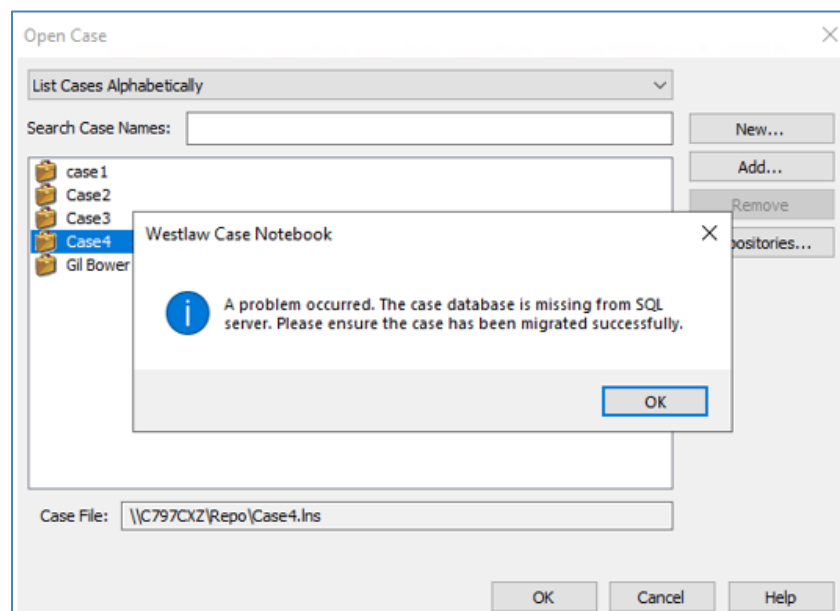


Figure 24

Once cases are successfully migrated, they will be available in Case Notebook Administration version 5.8.

Sometimes, the case migration process stops responding before completion. If you encounter such issues, refer to the [Scenario: Case Migration stops responding before Completion](#) section in the [Troubleshooting](#) chapter for instructions to restart the case migration process.

Important! After upgrading to Case Notebook version 5.8 and once you uninstall the old SQL 2014 WESTLIVENOTE instance, local cases can no longer be opened in Case Notebook version 5.8 (Figure 25). You need to open all local cases in Case Notebook version 5.8 prior to uninstalling the SQL 2014 WESTLIVENOTE instance. If you don't want to open each case, contact Customer Technical Support at 1-800-290-9378 to modify the case files manually.

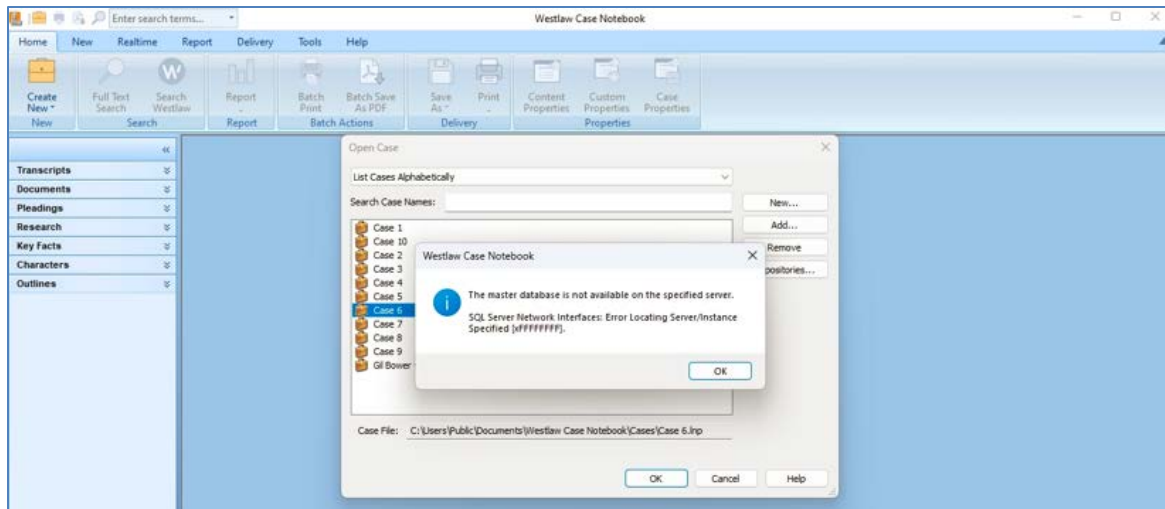


Figure 25

5 Best Practices after Repository Migration


Changing Client Repository after Migration

After the migration is complete, clients will still see the old repository in the **Repositories** list which is found in the **Open Case** dialog box. It is also recommended that you validate the client connectivity and functionality after migration.

Change the client repository after migration using one of the following three methods:

METHOD 1: MANUALLY REMOVING OLD REPOSITORY AND ADD NEW REPOSITORY

To change the client repository after migration, you can manually remove the old repository and add the new repository by selecting **Repository > Manage**. Now select the old repository to remove it from the available repositories list and click **Remove**. To add the new repository, click the **Repository** menu, then select **Manage > Add** to open the **Add Repository Server** dialog box, and use one of the following options:

- Type a server name or IP address to locate the repository in the **Server** text box.
- Click the  button to browse your machine and select a repository server.
- Click **Locate** to initiate an automated search of your network and automatically populate the list with all available repositories.

To set the new repository as the default repository, select the repository, then select **Set As Default.**, and **Close**.

For more information, go to **Help > Help Topics** in Case Notebook Administration.

METHOD 2: USING THE EXPORT SETTINGS FEATURE IN MANAGE REPOSITORIES

If you are an IT administrator with an Enterprise license, you can push the registry key to your clients by using the **Export** feature under **Manage Repositories** in **Case Notebook Administration**.

1. Select **Repository > Manage** as shown in Figure 26. The **Manage Repositories** dialog box is displayed.

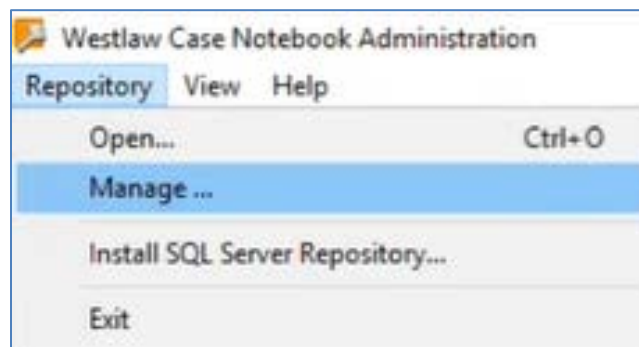


Figure 26

2. Select **Export Settings** in the **Manage Repositories** dialog box (Figure 27).

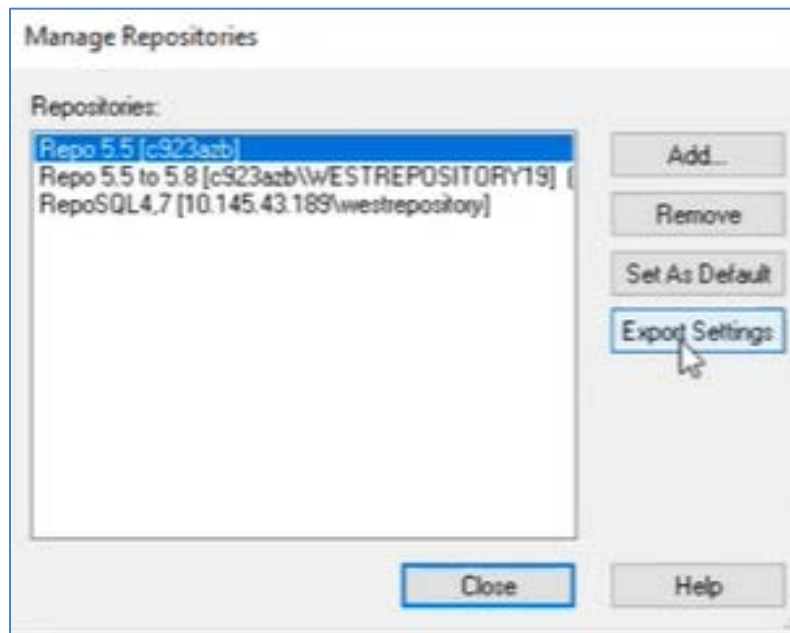


Figure 27

3. Save the **Repository Settings File (.reg)** as shown in Figure 28.

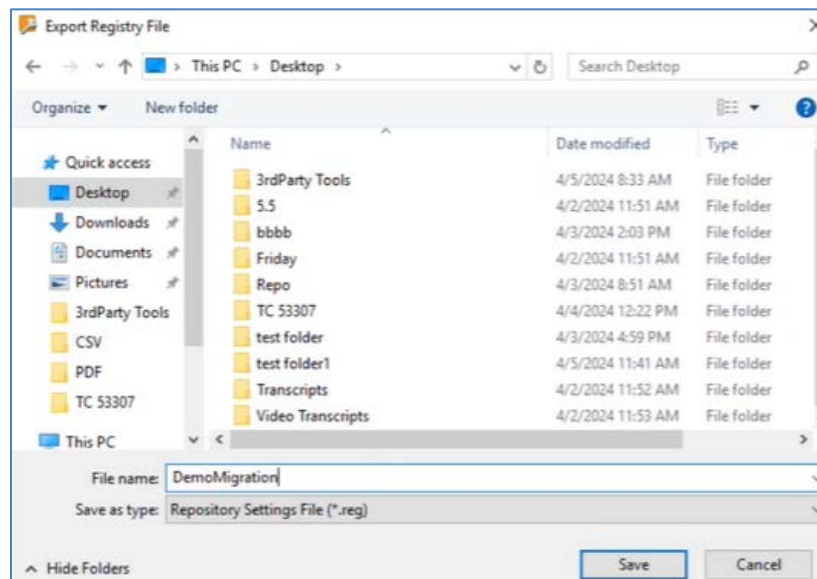


Figure 28

METHOD 3: ALLOWING CLIENTS TO AUTOMATICALLY DETECT NEW REPOSITORY

Another option would be to let clients automatically detect the new repository. When clients log in to Case Notebook, they are presented with the **Repository Update Check** dialog box to inform them that the repositories in their list may be out of date (Figure 29). If they want to check for updated repositories immediately, they can click **Yes**.

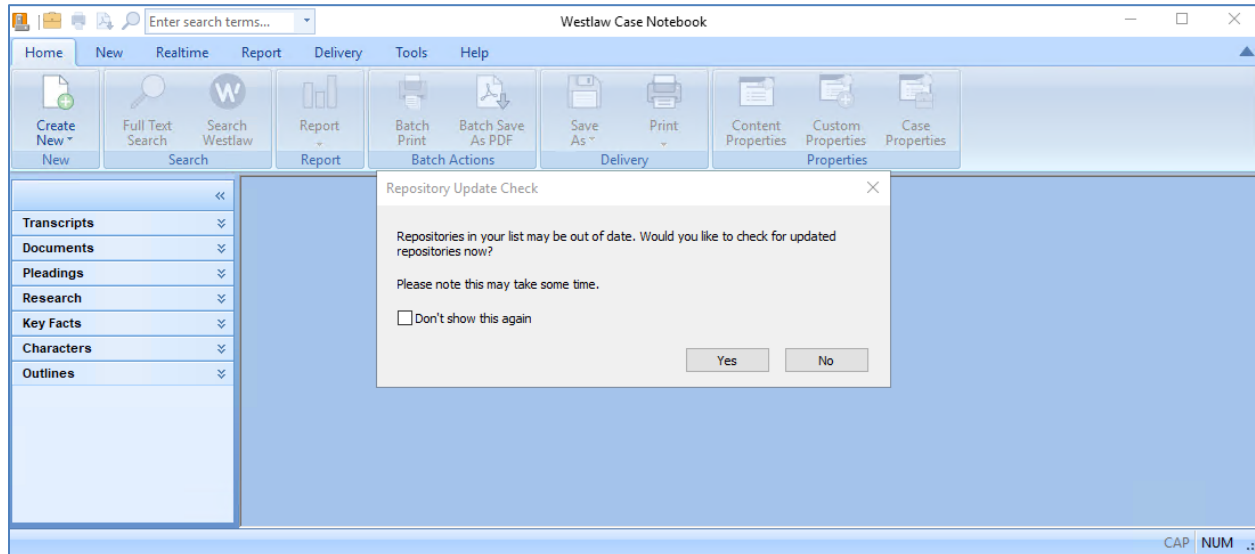


Figure 29

Case Notebook begins checking for migrated repositories (Figure 30).

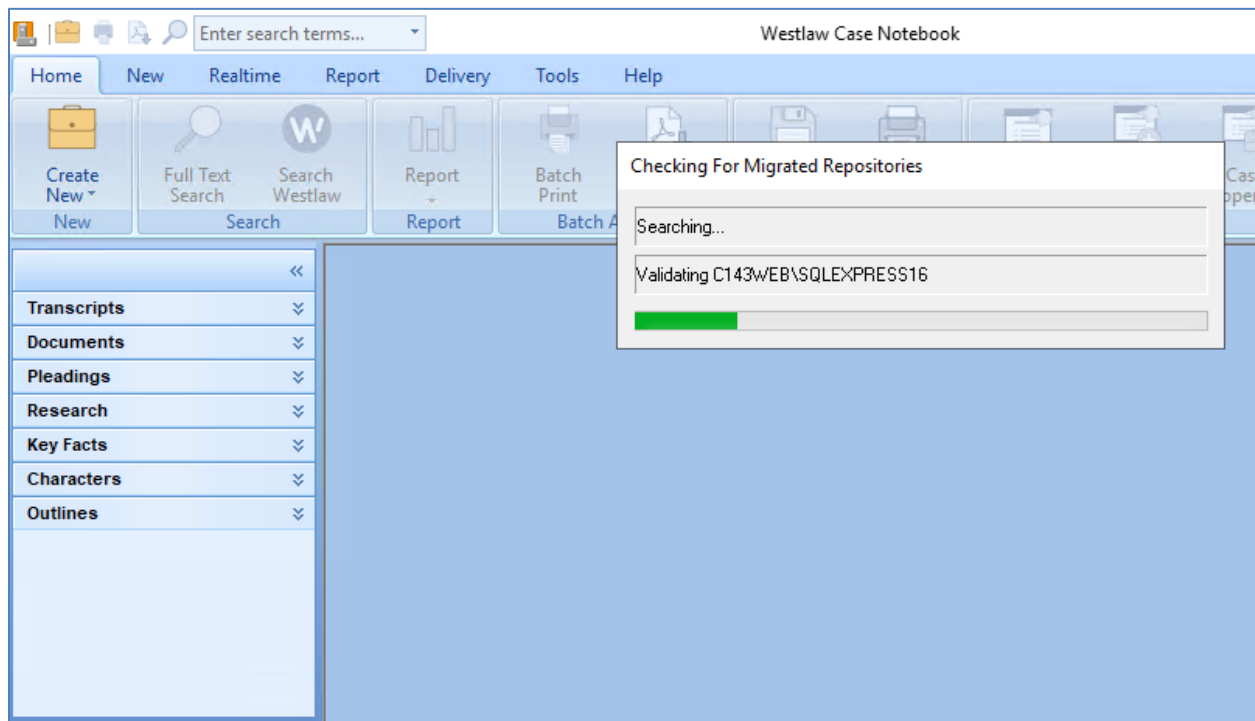


Figure 30

Once the process is complete, a list of updated repositories (repository name and host/instance name) is displayed under **Updated Repositories Found** as shown in Figure 31.

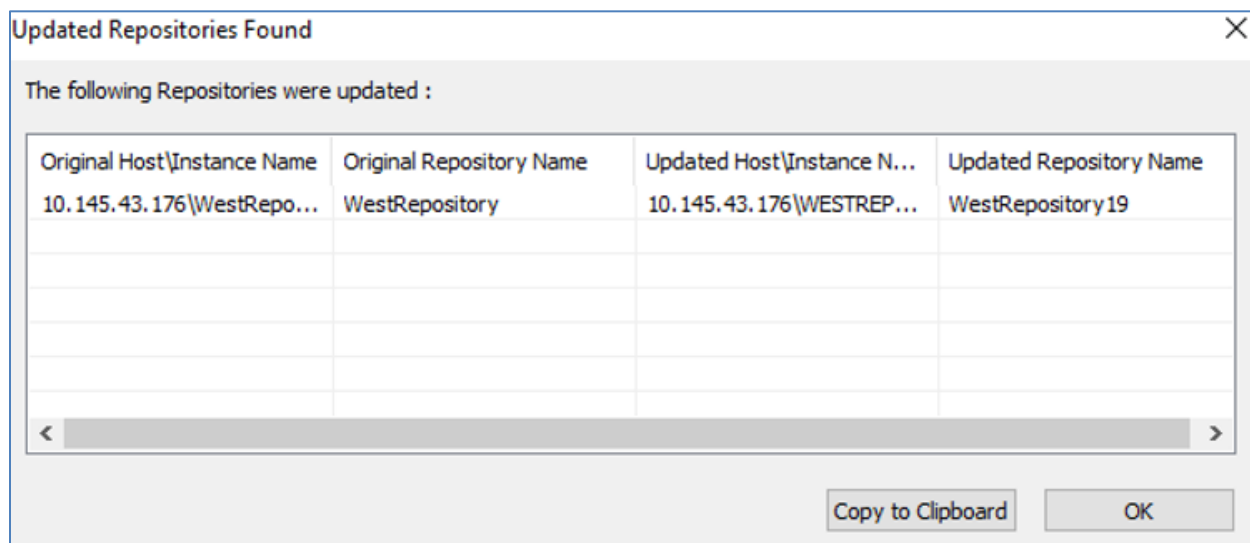


Figure 31

If there are no updated repositories, a message that no update was found for repositories is displayed.

Note: If your clients are on a large network or on a network with many SQL Servers, then it may take some time to complete the repository update check. For example, if there are 147 servers, it can take more than 25 minutes to complete this process. Once the process is started, your clients will have to wait for it to be completed.

If your clients don't want to check for updated repositories at this time, then they can click **No** to close the **Repository Update Check** dialog box. The **Repository Update Check** dialog box is displayed again when they log in to Case Notebook (unless they selected the **Don't show me again** checkbox previously).

Note: You can trigger the **Repository Update Check** dialog box for your clients through the **Registry Editor** by deleting the **ShowRepositoryUpdateCheck** registry key (Figure 32).

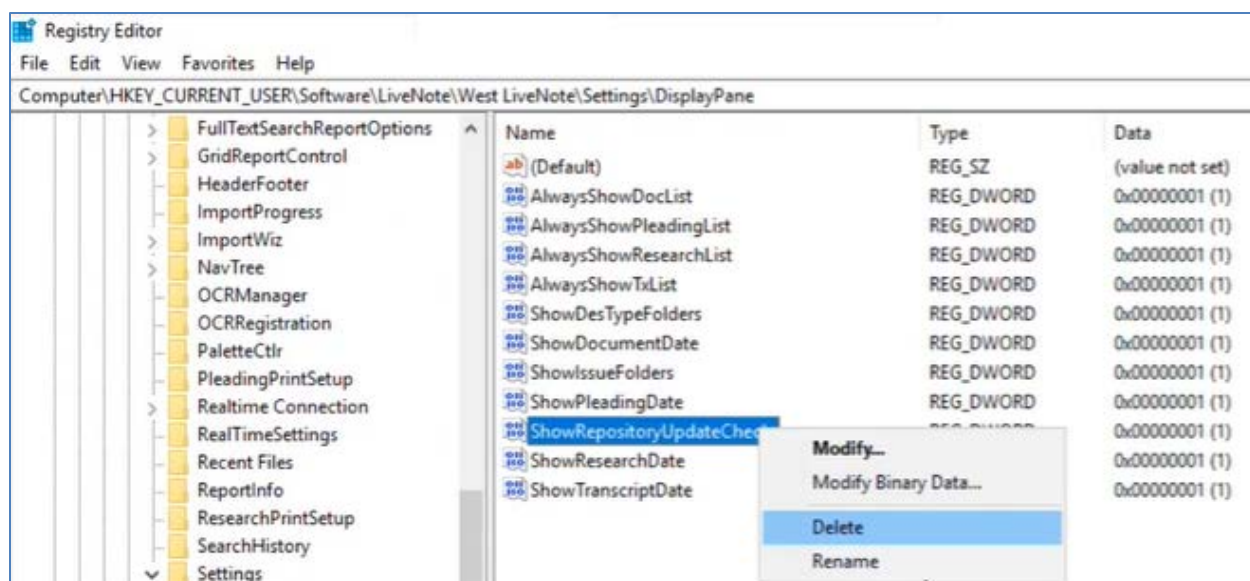


Figure 32

Updating Repository in other Case Notebook Administration Installations

IMPORTANT! If Case Notebook Administration is installed on other systems, after migration, when Case Notebook Administration is launched, the administrator user must skip the migration when prompted and update their repository from the **Repository > Manage** menu. For more information, go to **Help > Help Topics** in Case Notebook Administration.

Deleting Old Repository

It is recommended that you delete the old repository after migration is complete in order to prevent accidental use of the old repository which can lead to loss of work and case data. To ensure full success, stop the service of the SQL instance of the old repository, then take some time to validate that the repository and case migration was done successfully, and finally, delete the old repository instance.

Important! You can always restart the service to restore access to the data, but once it is deleted, the data cannot be retrieved. Therefore, the step to validate that the repository and case migration was done successfully is critical before proceeding to delete the old repository instance.

To stop the service of the SQL instance of the old repository:

1. Enter **services.msc** in the **Windows** search bar to open **SQL Server Configuration Manager**.
2. Select the SQL server instance of the old repository and choose **Stop** from the dropdown menu (Figure 33).

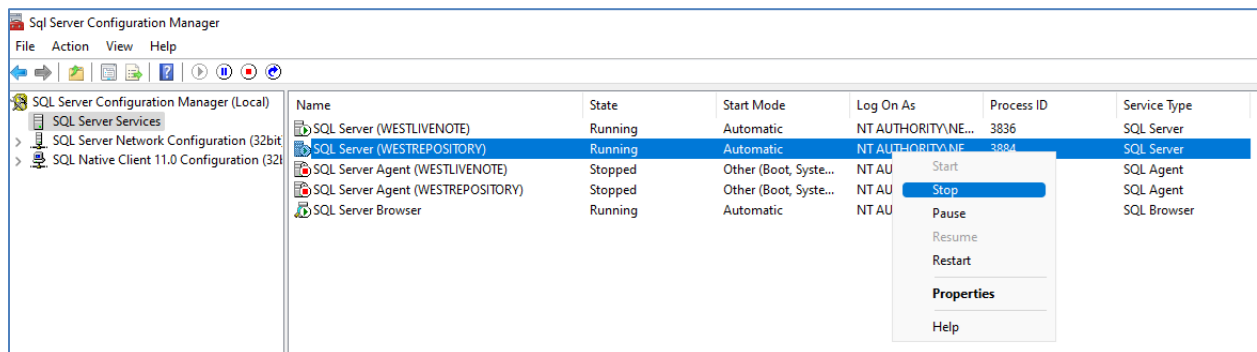


Figure 33

Once you have stopped the instance, you can delete the old repository.

To delete the old repository:

1. Install and launch **Microsoft SQL Server Management Studio**, then log in to connect to the server (Figure 34).

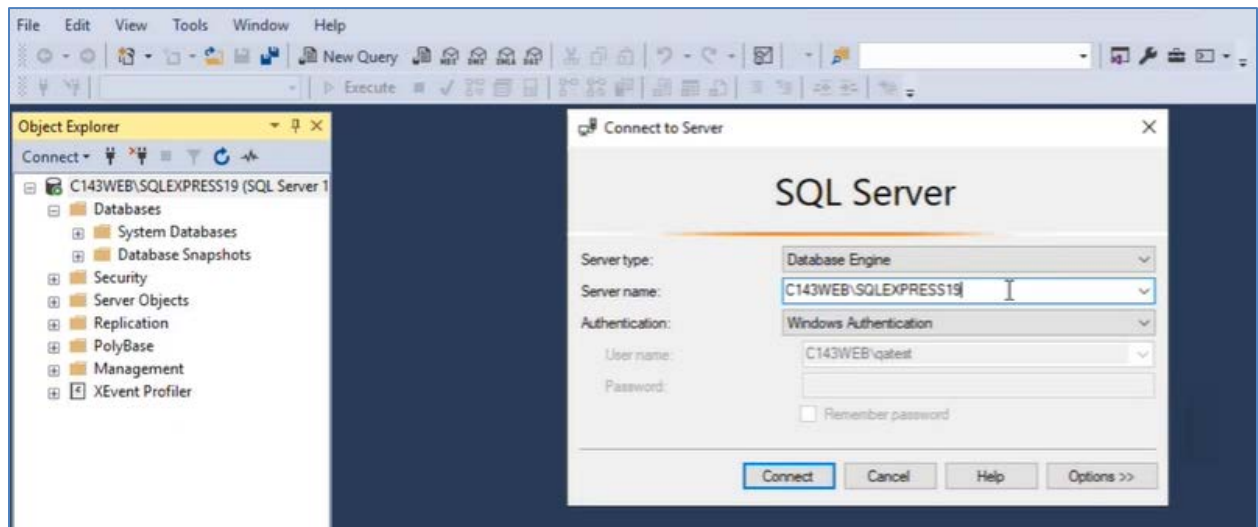


Figure 34

2. Select the old repository under **Databases** and choose **Delete** from the dropdown menu (Figure 35).

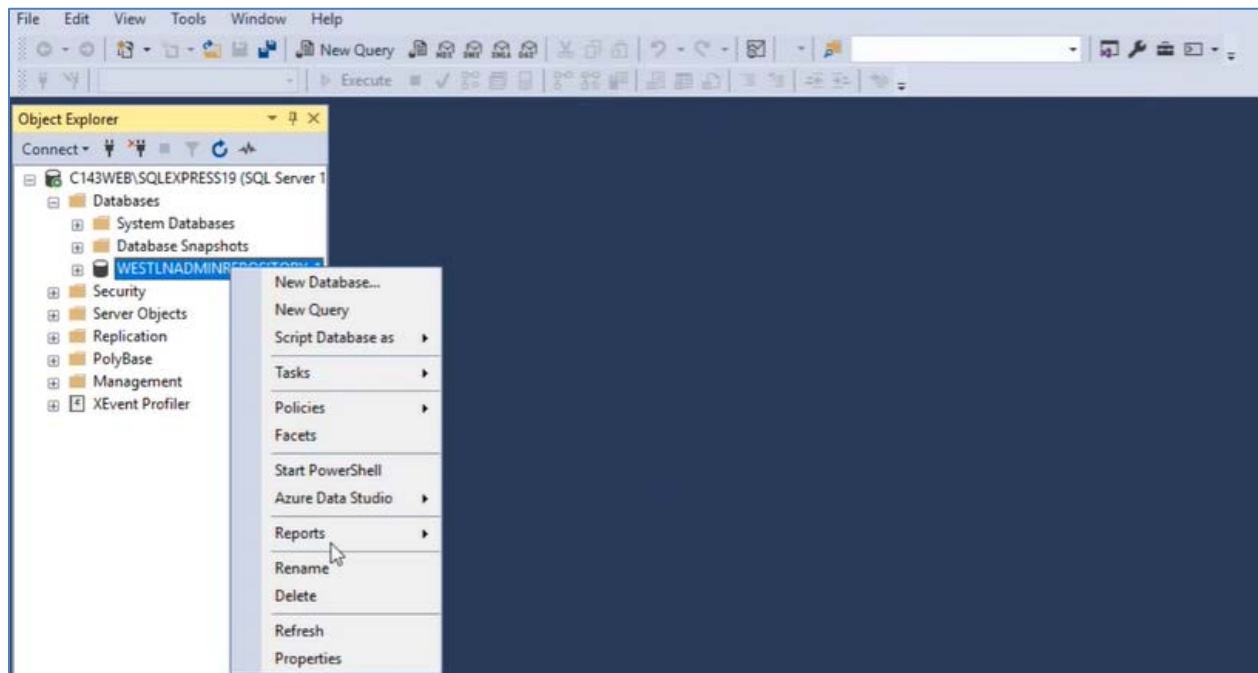


Figure 35

The **Delete Object** window is displayed (Figure 36). The **Delete backup and restore history information for databases** checkbox is selected by default.

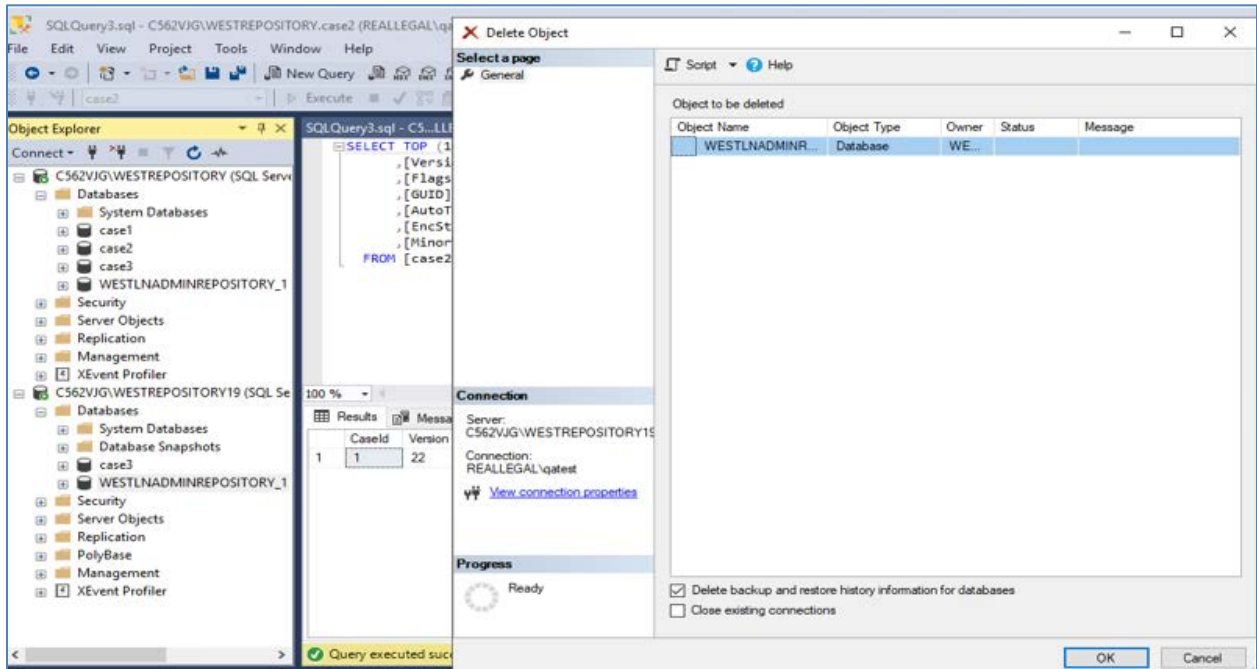


Figure 36

3. Click **OK**.
4. Open the **Registry Editor** and select **Repository > Repository 0** to find the old repository listed in the right pane (Figure 37).

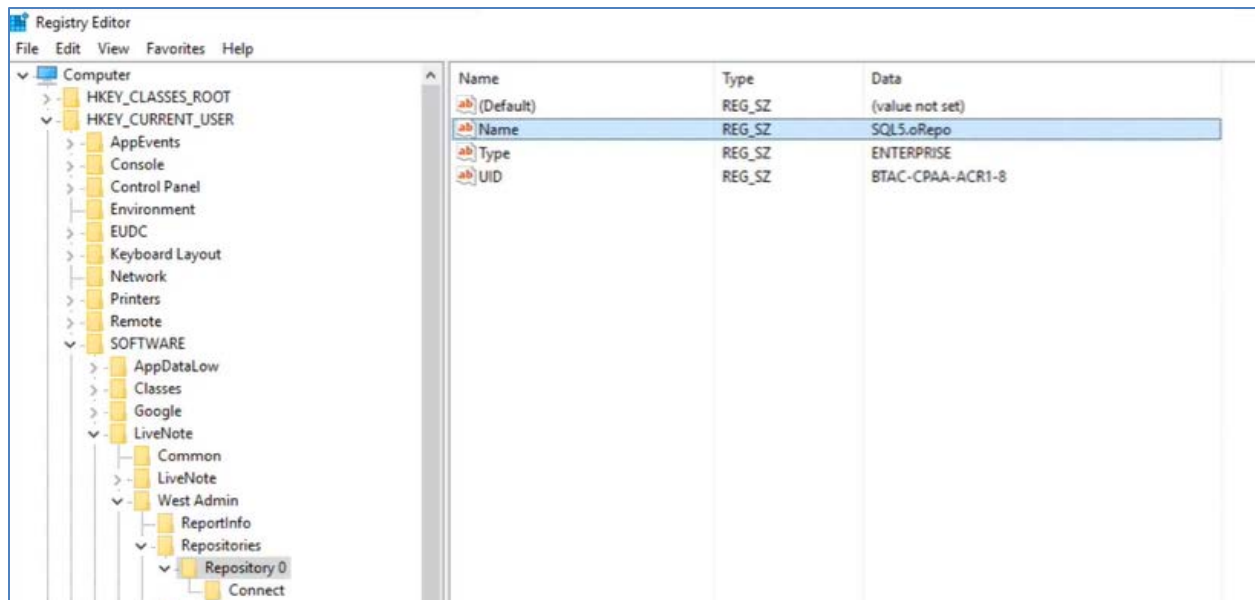


Figure 37

5. Select the old repository, right-click, and choose **Delete** from the dropdown menu. The old repository is deleted.

6 Troubleshooting

Scenario: Repository Migration stops responding before Completion

If the repository migration wasn't successful, a repository uninitialized error message is displayed. Sometimes, the migration process stops responding before completion (Figure 38).

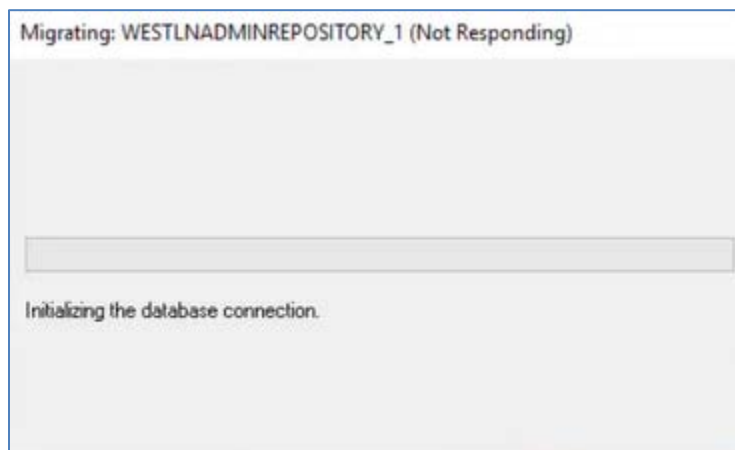


Figure 38

If you encounter such issues, complete the following steps to restart the migration process.

1. Open the **Registry Editor** and navigate to the following path:
Computer\HKEY_CURRENT_USER\SOFTWARE\LiveNote\West Admin\Settings
2. Select **SQLMigration** and choose **Modify** from the dropdown menu. The **Edit DWORD (32-bit) Value** dialog box is displayed (Figure 39).

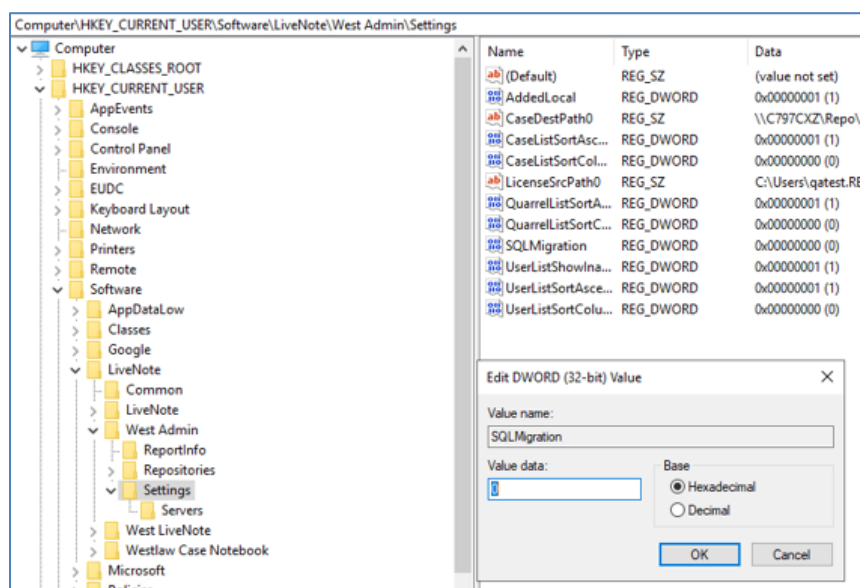


Figure 39

3. Set the **Value data:** to **0**.
4. Delete the **Config.xml** file in the following path as shown in Figure 40: **C:\ProgramData\Westlaw Case Notebook\Westlaw Admin**

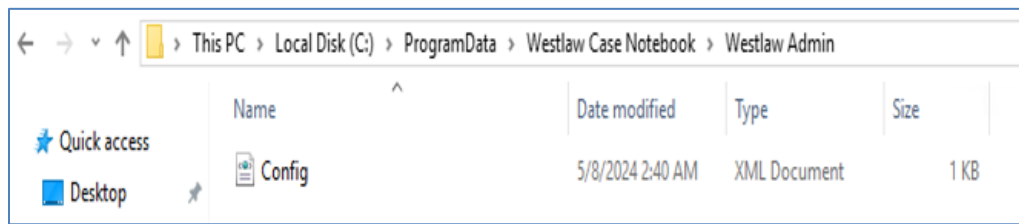


Figure 40

5. Install and launch **Microsoft SQL Server Management Studio** and log in to connect to the server (Figure 41).

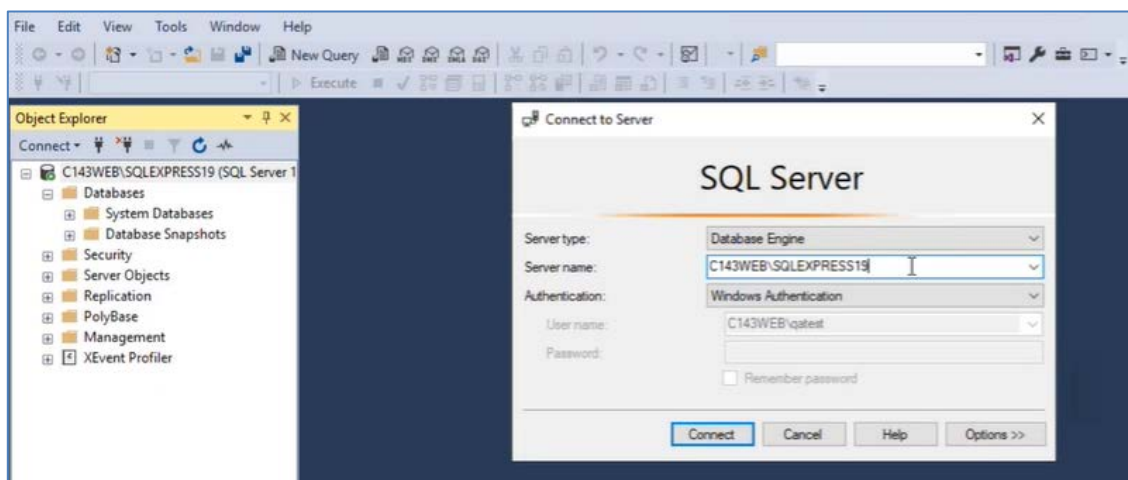


Figure 41

6. Select **WESTREPOSITORY19** repository under **Databases** and choose **Delete** from the dropdown menu (Figure 42).

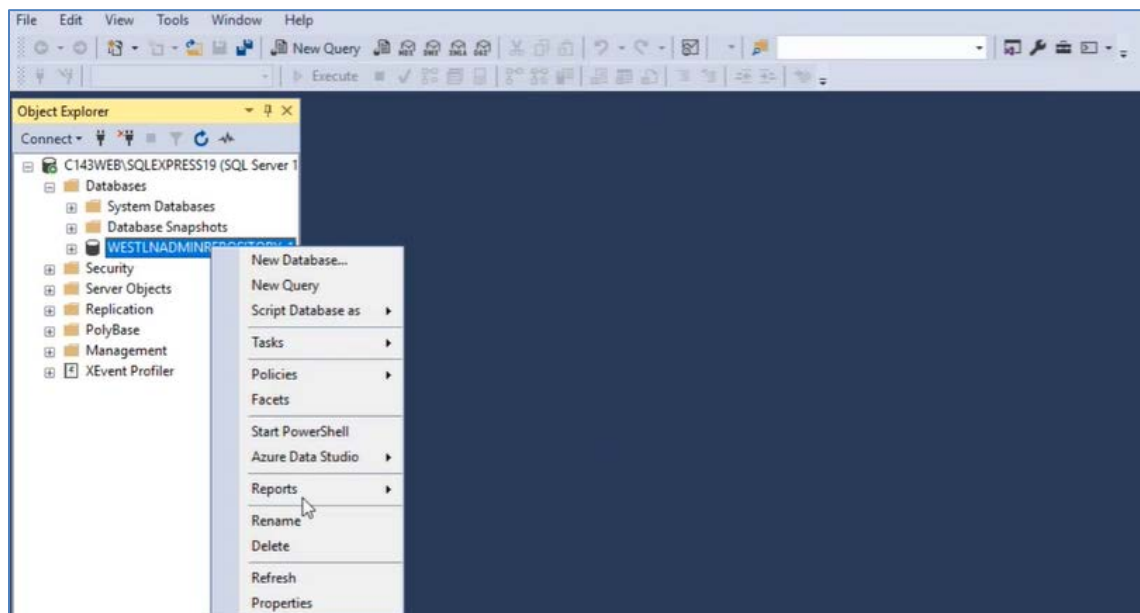


Figure 42

The **Delete Object** window is displayed (Figure 43). The **Delete backup and restore history information for databases** checkbox is selected by default.

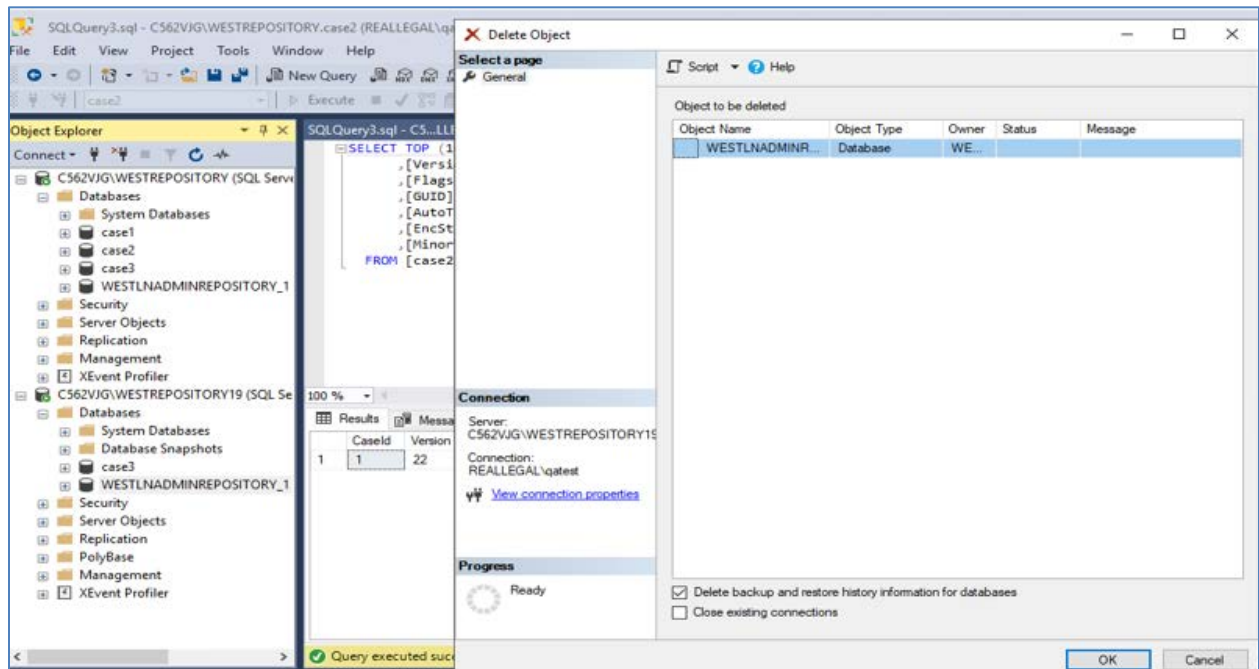


Figure 43

7. Click **OK**.
8. Open Case Notebook Administration. You will be prompted to upgrade your repository to the current version of SQL Server for improved security and performance via the built-in migration tool. The **Repository > Migrate Repository** option is also available and no longer grayed out (Figure 44).

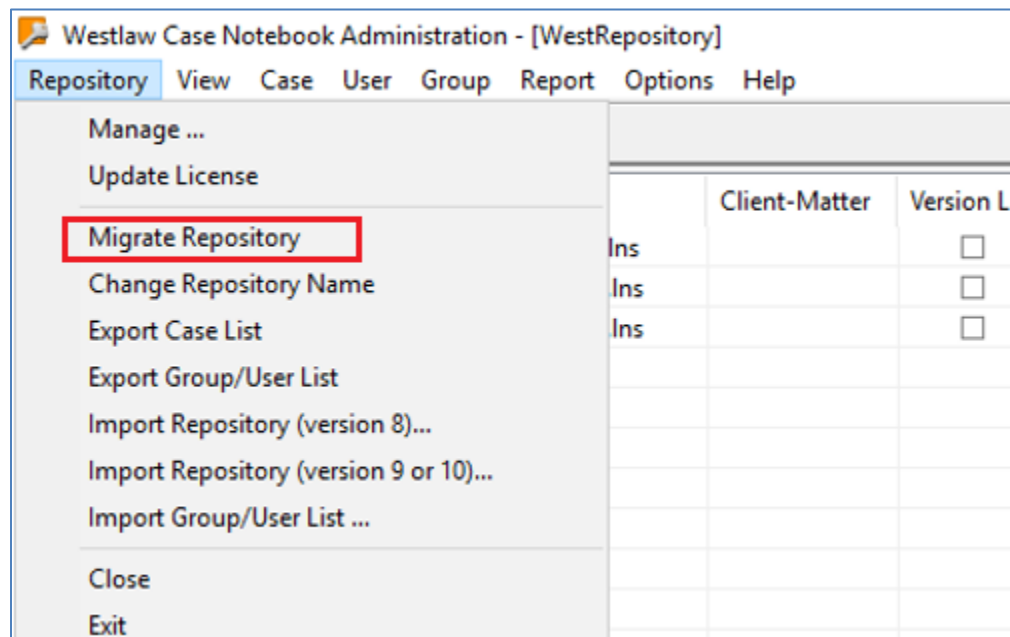


Figure 44

After repository migration is successfully completed, the **WESTLNADMINREPOSITORY_1** database is created under **WESTREPOSITORY19** Instance (Figure 45).

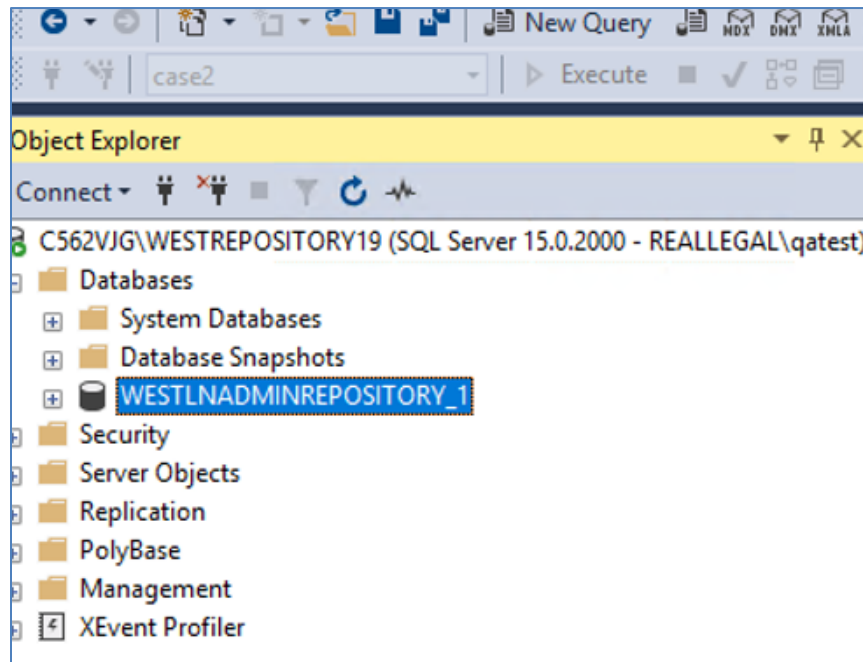


Figure 45

The following changes are made to the LNS file as shown in Figure 46.

- Hide= "True "
- Repository still points to **WESTREPOSITORY** which is the old repository until case migration is done.



Figure 46

Note: Before repository migration, the LNS file does not have the Hide tag and repository points to **WESTREPOSITORY** which is the old repository.

Scenario: Case Migration stops responding before Completion

If case migration stops responding, launch **Microsoft SQL Server Management Studio** and delete the cases from the database in the new repository (Figure 47 and Figure 48).

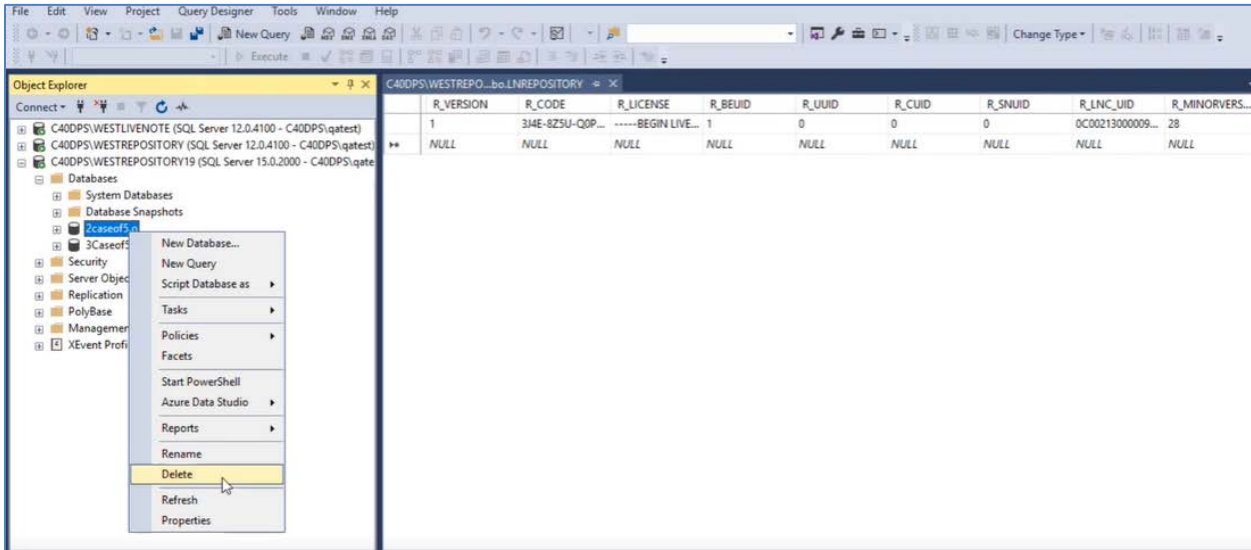


Figure 47

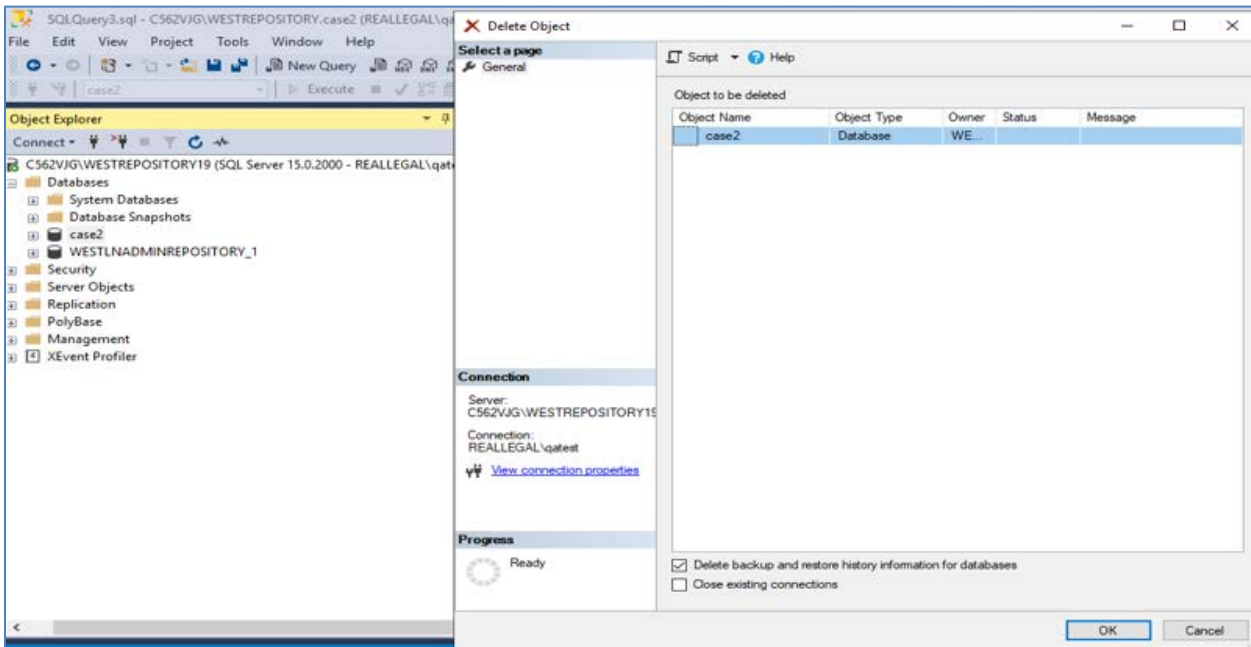


Figure 48

Now, navigate to the LNS file and make the following changes.

- Change the **Hide** tag to **True**.
- Point the repository to **WESTREPOSITORY**.

```
<?xml version="1.0" encoding="utf-8" ?>
```

```
<LiveNoteProject>
```

```
<Version VerNum="2" />
```

```
<Files Path=".\\case2.dir" Hide="True"/>
```

```
<Properties CaseName="" ClientMatter="" Comments="" DateCreated="20240423153724" />
```

```
<SecureProperties IsSecure="Yes" RepositoryUID="BTAC-CPAA-ACR3-4" CaseUID="AJAA-AAA" />
```

```
<DataBase> <SqlServer Catalog="case2" Local="No" Server="c562vjg\\WESTREPOSITORY" />
```

```
</DataBase>
```

```
</LiveNoteProject>
```

After case migration is successfully completed, case database is created under the **WESTREPOSITORY19** instance (Figure 49).

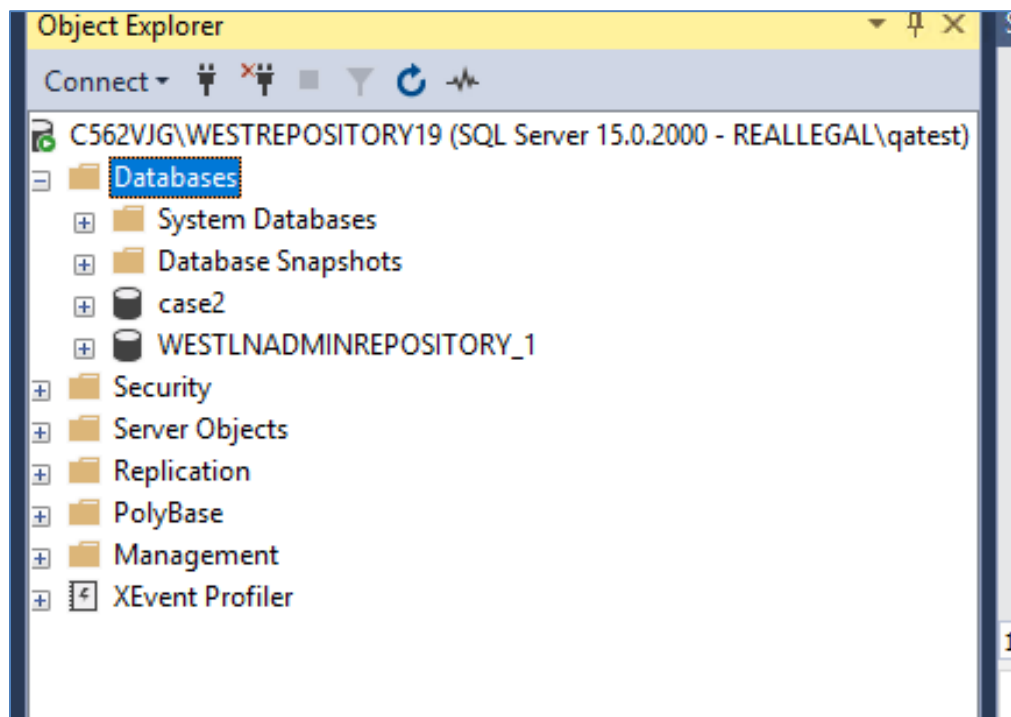


Figure 49

The following changes are made to the LNS file as shown in Figure 50.

- **Hide = "False"**
- Repository points to **WESTREPOSITORY19** which is the new repository



```
case2 - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8" ?>
<LiveNoteProject>
  <Version VerNum="2" />
  <Files Path=".\\case2.dir" Hide="False" />
  <Properties CaseName="" ClientMatter="" Comments="" DateCreated="20240423153724" />
  <SecureProperties IsSecure="Yes" RepositoryUID="BTAC-CPAA-ACR3-4" CaseUID="AJAA-AAA" />
  <DataBase>
    <SqlServer Catalog="case2" Local="No" Server="c562vjg\\WESTREPOSITORY19" />
  </DataBase>
</LiveNoteProject>
```

Figure 50

Scenario: Repository Migration fails due to Missing Case Files

Sometimes, after upgrading Case Notebook Administration from version 4.7 to 5.8, when Case Notebook Administration is opened, there is a message about a missing LNS file (Figure 51). After the administrator user clicks **OK** to close the window, they find that many cases are missing from the **Cases** list.

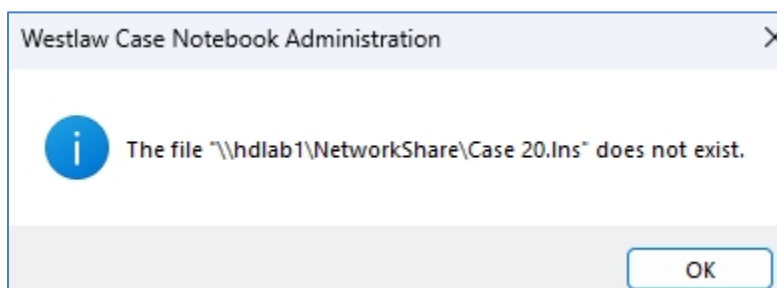


Figure 51

When there is a missing or inaccessible LNS file, case migration fails and an error message is displayed (Figure 52).

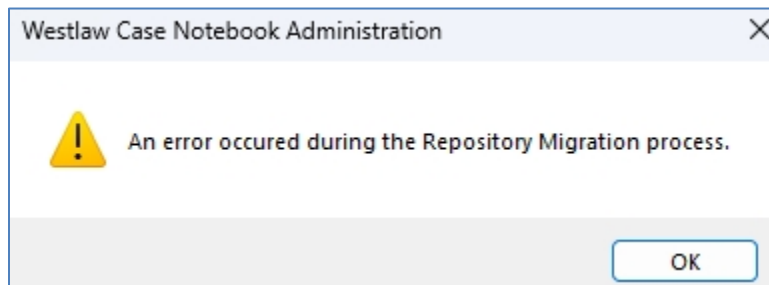


Figure 52

To identify the missing LNS files:

1. Connect to the SQL instance using **SQL Server Management Studio (SSMS)**.
2. Click **New Query**.
3. Enter the following query and select **Execute** to get a list of cases along with their names, catalogs, and locations:

```
USE [WESTLNADMINREPOSITORY_1]

select [C_UID] , [C_NAME] as Casename , [C_CATALOG] as DatabaseName , [C_LOCATION] FROM
[WESTLNADMINREPOSITORY_1].[dbo].[LNCASE]
```

4. When you get the results, click the **C_LOCATION** column header to select all the entries (Figure 53).

	C_UID	Casename	DatabaseName	C_LOCATION
1	1	Case1	Case1	\\C562VJG\Repo\Case1.Ins
2	2	Case2	Case2	\\C562VJG\Repo\Case2.Ins

Figure 53

5. Choose **Copy** from the dropdown menu.
6. Open **Notepad** and paste the results.
7. Save the file as **LNS_Locations.txt**.
8. Save the attached **LNS_Check.txt** file in the same folder as the **LNS_Locations.txt** file.
9. Rename **LNS_Check.txt** to **LNS_Check.bat**.
10. Open a command line, browse to your folder, and run the **LNS_Check.bat** file.

The batch file will loop through the list to verify if the LNS file is found or not. This creates a CSV (comma-separated values) file named **LNS_Check_results.csv**.

Note: This process doesn't take network permissions into account. If the LNS file is in a shared location that is not accessible to the user running the .bat file, then the result is **Does Not Exist** as shown in Figure 54.

	File Path	Result
2	C:\CaseNotebookCases\Gil Bower v. DC Corporation - Repository Version.Ins	Exists
3	C:\CaseNotebookCases\Case 1.Ins	Exists
4	C:\CaseNotebookCases\Case 2.Ins	Exists
5	C:\CaseNotebookCases\Case 3.Ins	Exists
6	C:\CaseNotebookCases\test123.Ins	Exists
7	C:\CaseNotebookCases\GB Copy from Admin 2.Ins	Exists
8	C:\CaseNotebookCases\BlankCanvas.Ins	Exists
9	C:\CaseNotebookCases\KeyFactTest.Ins	Exists
10	C:\CaseNotebookCases\Shepler v_ CSU.Ins	Exists
11	C:\CaseNotebookCases\Rivera v. Naifeh.Ins	Does Not Exist

Figure 54

You now have the option to keep the case for migration by recreating/repairing the missing LNS file. Otherwise, you can delete the case record and remove the case from the database.

To recreate/repair the missing LNS file:

1. Make a copy of a working **.lns** file. Missing file **case2** is being used as an example here.
2. Rename the copied file to match the missing case name, for example, **CaseName.lns** as shown in Figure 55.

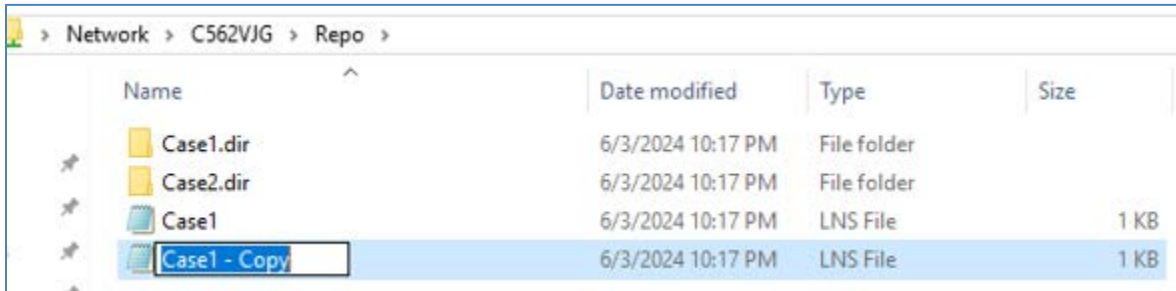


Figure 55

3. Open the newly created **.lns** file and update the content which is shown in red font in Figure 56.

```
<?xml version="1.0" encoding="utf-8" ?>
<LiveNoteProject>
  <Version VerNum="2" />
  <Files Path=".\Case2.dir" />
  <Properties CaseName=" Case2" ClientMatter="" Comments=""
DateCreated="20240603221722" />
  <SecureProperties IsSecure="Yes" RepositoryUID="BTAC-CPAA-ACSA-M" CaseUID="AEAA-AAA"
/>
  <DataBase>
    <SqlServer Catalog="Case2" Local="No" Server="c562vjg\WESTREPOSITORY" />
  </DataBase>
</LiveNoteProject>
```

Figure 56

4. Replace **{CaseName}** with the actual case name.

To delete the case record, if you are removing the case:

1. Run the query for identifying the missing case files and refer to the query output for **Case ID** to get the **C_UID** of the missing case.
2. Execute the following query in **SQL Server Management Studio (SSMS)** to delete the case record. We are using **Case2** as an example here.

```
USE [WESTLNADMINREPOSITORY_1]
delete FROM [WESTLNADMINREPOSITORY_1].[dbo].[LNCASE] where C_UID={C_UID};
```

3. Replace **{C_UID}** with the actual **C_UID** of the missing case.

```
USE [WESTLNADMINREPOSITORY_1]
delete FROM [WESTLNADMINREPOSITORY_1].[dbo].[LNCASE] where C_UID= 2 ;
```

Important! The delete query must be executed with extreme caution. Ensure that a **WHERE** clause is included to prevent accidental deletion of data. Running a delete query without a **WHERE** clause can result in the loss of all records in the table.

Scenario: Error occurs if Microsoft OLE DB Driver 18.6.5 or 18.6.7 is installed on Machine

While installing Case Notebook Administration and Case Notebook, an error occurs if Microsoft OLE DB Driver 18.6.5 or 18.6.7 is installed on the machine (Figure 57 and Figure 58).

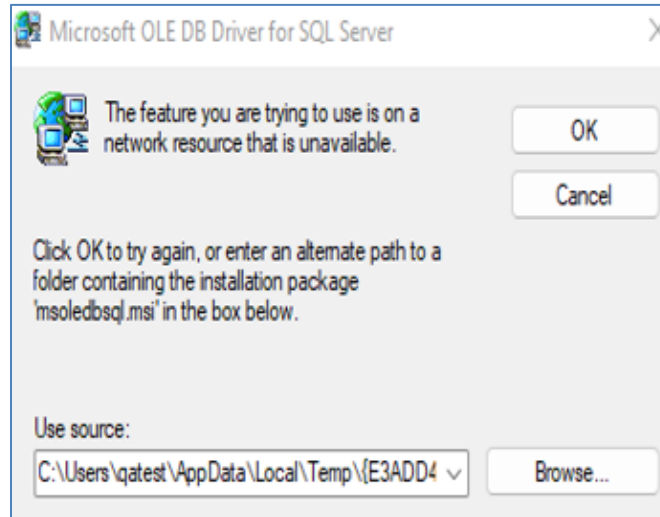


Figure 57: Error message from Case Notebook Administration

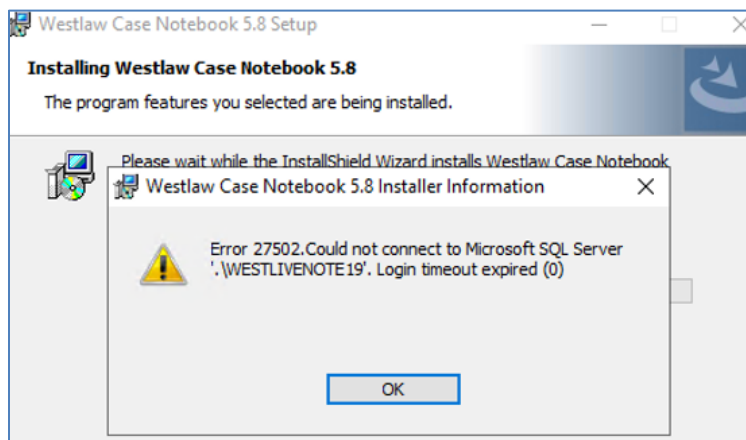


Figure 58: Error message from Case Notebook

To resolve this error, find and uninstall the old version of the **Microsoft OLE DB Driver for SQL Server** (Figure 59).

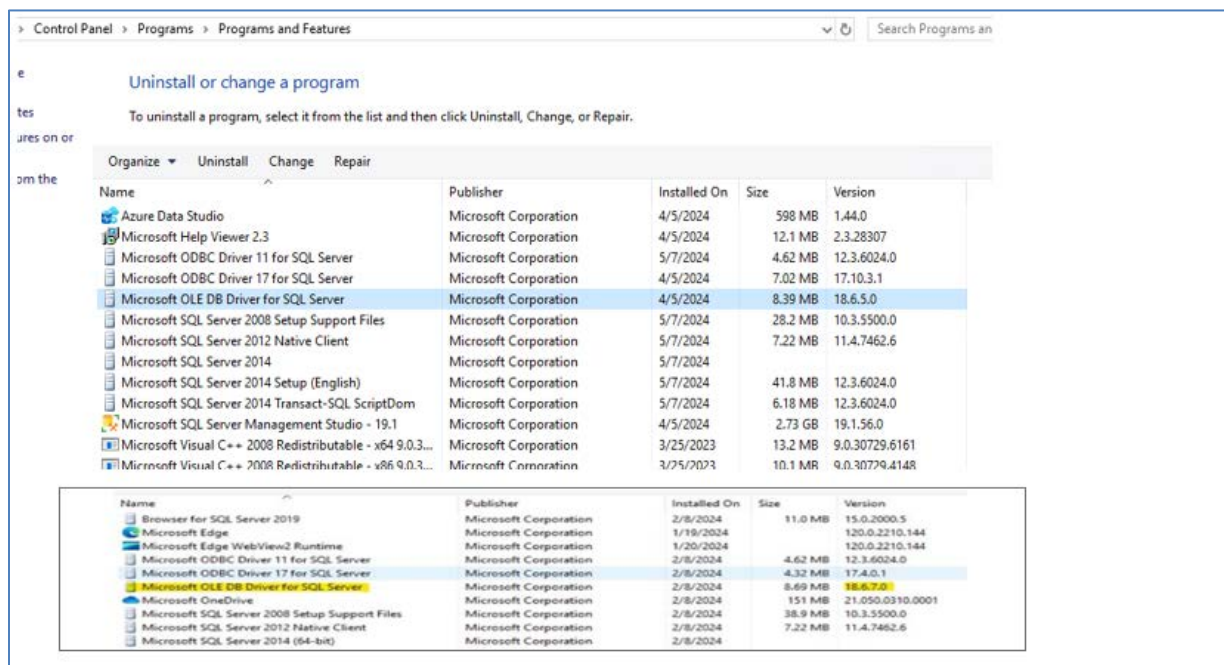


Figure 59

Then install Case Notebook Administration or Case Notebook Repository. Version 5.8 installers come with **Microsoft OLE DB Driver 18.6.7.0** (Figure 60).

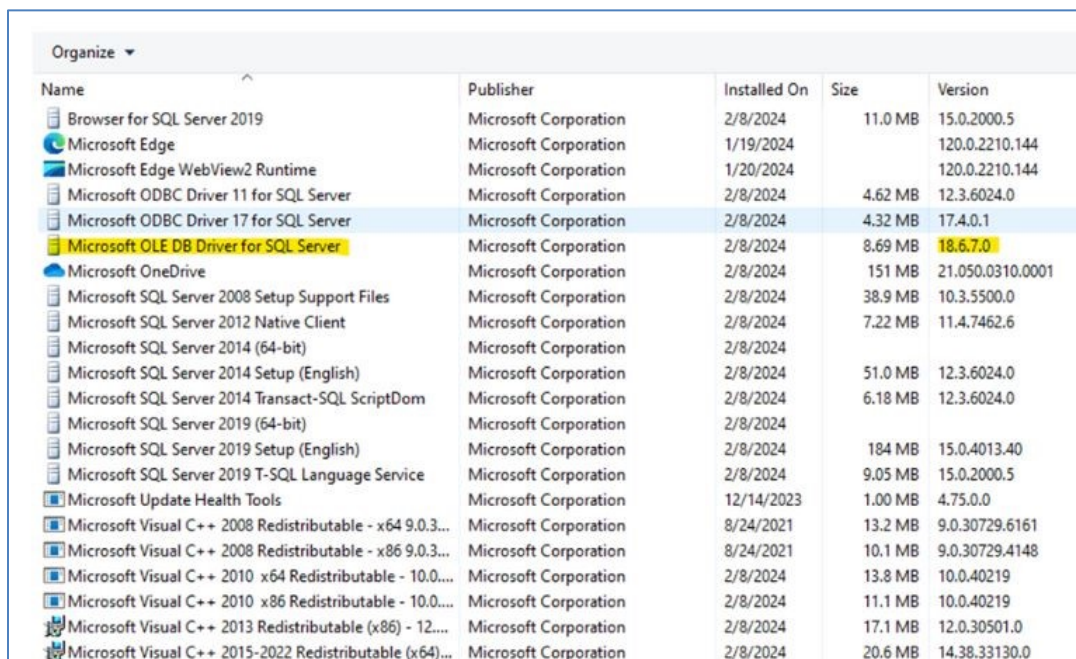


Figure 60