

Frequently Asked Questions for Installing the Case Notebook Application Suite

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For assistance using Case Notebook, call 1-800-290-9378 or e-mail westlaw.softwaresupport@thomsonreuters.com.

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.

What are the components of the Case Notebook Application Suite?

There are four main components of the Case Notebook application suite.

- **Case Notebook:** An application that serves as an electronic organizer and deposition tool for saving and working with important documents, research, and transcripts in a case.
- **Case Notebook Repository:** A database for Case Notebook shared cases that allows administrators to assign access rights to cases to multiple users.
- **Case Notebook Administration:** A application used by Case Notebook administrators to create and manage shared cases in a repository
- **Case Notebook Remote Access Server (RAS):** An application that provides remote access to Case Notebook via the Internet.

How is SQL Server used?

The Case Notebook application suite utilizes SQL Server as a service to allow users' computers to locate and access the Case Notebook Repository. The SQL Server database only stores the user and case location information. Case files (.lns) are stored locally or on a server that can be managed by the Case Notebook Repository and Case Notebook Administration programs. Users can have multiple instances of SQL if desired. The SQL Server instance installed with Case Notebook does not affect other programs using SQL.

Where is data stored?

For Case Notebook Repository, user and case location information is stored in a SQL Server database. Case files (.lns) are stored locally or on a server.

How is data backed up?

Case Notebook Repository performs a scheduled back up of user information and case locations at the end of each day and stores the information in the backup directory for Microsoft SQL Server. For example, C:\Program Files\Microsoft SQL Server\130\MSSQL.1\MSSQL\Backup. The exact location may vary depending on the SQL Server instance. Case files are not backed up as part of the repository backup and must be backed up separately.

What are the performance variables?

Computer performance can affect how quickly users can import documents, generate a report, or run a search in Case Notebook. Performance can depend on the following variables:

- Computer Processor;
- Amount of RAM;
- How the computer is being used.

What considerations must be taken when installing on a network?

- You must install Case Notebook Administration on a local drive, not on a shared network.
- When installing data on a network, you must identify the location by a UNC path. For example, \\mycomputer\mysharedfolder.
- Users must have read, write, and modify permissions to access the data.

Can users install the Case Notebook Application Suite on a virtual drive?

No.