



LiveNote Application Suite: Installation Guide

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Chapter 1: The LiveNote Application Suite Installation Guide

This installation guide provides you with the information you need to install the LiveNote Application Suite.

It contains an overview of each of the components of the LiveNote Application Suite and information about basic system requirements for installation.

Components of the LiveNote Application Suite

The LiveNote Application Suite is comprised of a number of inter-operating software components.

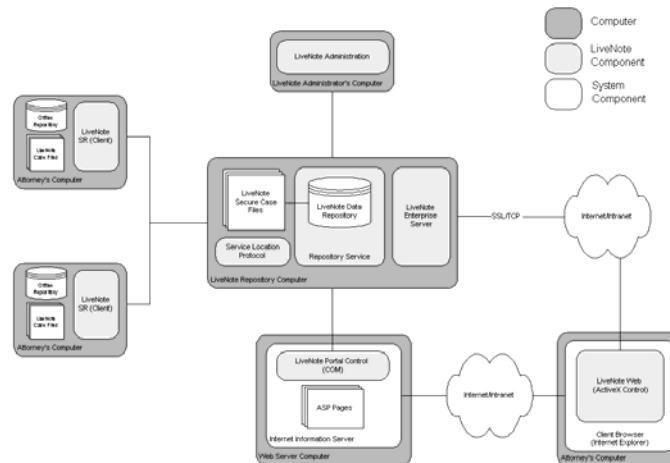


Figure 1: Components of the LiveNote Application Suite. For a full-sized diagram, see *Appendix A: Components of the LiveNote Software Suite* on page 37.

LiveNote's Transcript Management Software

LiveNote's transcript management software enables users to manage cases, and organize, view, search and annotate transcripts both in realtime and at any time after the transcript has been created.

LiveNote SR

LiveNote SR is LiveNote's premier transcript management program. It is designed for those who want to share secure cases with other users on a network. In addition, users can replicate cases to offline if they want to work away from the office. Later, their changes can be integrated back with the case on the network. They can also work on local cases.

You will need Modify NTFS permissions to the LiveNote SR installation folder.

To access your case data, set the permissions for all case data folders to: Change for share permissions and Modify for NTFS permissions. If you will be replicating cases to offline, set the permissions for the C:\Documents and Settings\

Typically, LiveNote SR is installed along with the LiveNote Repository and LiveNote Administration. To authenticate into the LiveNote Repository, you must use TCP port 3050 to access the LiveNote Repository server.

LiveNote Web

LiveNote Web is a Web-based program that provides basic transcript management functionality, enabling users to access and work with secure cases stored on the office server while out of the office.

LiveNote Web must be installed on the same computer as your firm's Web server. LiveNote Web works in conjunction with the LiveNote Repository, LiveNote Administration and the LiveNote Enterprise Server.

LiveNote Web connects to the LiveNote Enterprise Server across the Internet or Intranet over a secure access channel on port 443, although this can be customized to meet your needs. This reduces firewall management for external Internet access, because most firewalls leave port 443 open by default.

Because LiveNote Web is an ActiveX control, users can only use this product from Internet Explorer 5.5 and above.

Note: Version 10 of LiveNote Administration allows for Active Directory Integration. This means that you can use Microsoft Server 2003 user names and password to control access to LiveNote cases. However, because Active Directory integration is not compatible with LiveNote Enterprise Server version 9, if you implement Active Directory, you will not be able to log in to LiveNote Web.

The LiveNote Repository

The LiveNote Repository consists of:

The LiveNote Repository Service is a small SQL compliant database engine servicing requests from other LiveNote Software components.

The LiveNote Data Repository is a database file managed by the Repository Service.

The LiveNote Repository is installed on a network computer accessible to all LiveNote users and administrators. It provides information relating to users, secure cases and their associated access rights.

The LiveNote Repository is accessed via TCP port 3050.

The Service Location Protocol

The Service Location Protocol is installed with the LiveNote Repository and runs on the repository computer. It automates the detection of the LiveNote Repository by listening to broadcast requests made by LiveNote components and responding with repository location information.

Secure Case Files

The secure case files are a set of proprietary-formatted files that are typically stored on a network share. We generally recommend that the LiveNote Repository use UNC paths to point to where the case data is stored. Secure case files are not stored within the LiveNote Repository itself, but are still stored as Windows flat files, for which you will need Change Share and Modify NTFS permissions.

LiveNote Administration

LiveNote Administration is installed on each LiveNote administrator's computer. It is used for configuring and managing secure cases, user authentication details and access permissions, stored in the LiveNote Repository.

LiveNote Administration requires TCP port 3050 access to the LiveNote Repository and Windows network share access to the secure case files.

LiveNote Enterprise Server

LiveNote Enterprise Server is installed on the repository computer and is the primary component that enables remote transcript sharing. Specifically, the LiveNote Enterprise Server handles the authentication of the remote user via the LiveNote Web ActiveX control. After the remote user has successfully authenticated, the LiveNote Enterprise Server handles the data transfer between the remote client and the LiveNote Repository.

LiveNote Enterprise Server delivers services to remote users over a secure SSL 128-bit encrypted access port. By default, this is TCP port 443 (although this can be configured to meet your needs). This reduces firewall management for external Internet access, as most firewalls leave port 443 open by default.

Note: LiveNote Web must use the same port as LiveNote Enterprise Server; if you change the host port for LiveNote Enterprise Server, change it for LiveNote Web as well.

LiveNote Portal

The LiveNote Portal provides a server side and client side scripting interface to access a subset of information from the Repository Service via the standard Windows COM interface.

This means any COM enabled technology can use this component to integrate information from the LiveNote Data Repository into another program; for example, a Web portal. This component can retrieve case lists for specified users, and transcript lists for specified cases.

Cost Recovery is a program built with LiveNote Portal. It allows large law firms to track how many transcripts they add to LiveNote SR. Cost Recovery also breaks down the numbers by case, allowing firms to determine which cases consume most of their LiveNote resources.

System Requirements

In the requirements listed below, the minimum hardware requirements are listed first, and the recommended configurations are listed parenthetically. If you intend to view video with LiveNote, use the recommended configurations or higher.

LiveNote SR, LiveNote TS, LiveNote Web, LiveNote Administration and LiveNote Portal.

Pentium 300-MHz processor (1.8 gigahertz recommended).

500 megabytes of RAM (1 gigabyte recommended).

10 gigabytes of available hard drive space (100 gigabytes recommended).

Windows 2000 or XP Service Pack 2

Internet Explorer 5.5 or above

Windows 2003 Server

Windows Media Player version 9 or later

Note: Vista is a supported operating system for LiveNote SR, LiveNote Administration, and LiveNote Repository. Vista is not supported, however, for LiveNote Web and LiveNote Portal.

LiveNote Repository

Note: LiveNote Repository is only a pointer to a local area network (LAN) or a wide area network (WAN). It does not hold all of your case data, such as transcripts or documents. It simply manages cases, user names, passwords, groups of users and so forth.

Pentium 300-MHz processor (1.8 gigahertz recommended).

500 megabytes of RAM (1 gigabyte recommended).

10 gigabytes of available hard drive space (100 gigabytes recommended).

Windows 2000, Windows Server 2003.

LiveNote Enterprise Server

Pentium 500-Mhz processor (1.8 gigahertz recommended).

256 megabytes of RAM (1 gigabyte recommended).

50 MB available hard drive space (20 gigabytes recommended).

Windows 2000, Windows Server 2003.

Note: LiveNote no longer supports the Windows 95 or 98 operating systems.

Chapter 2: Installation

You must have administrator privileges on the computers on which you are installing the LiveNote Application Suite.

Upgrading

When upgrading to LiveNote SR Version 10 make sure that you enter your new LiveNote license code. If you do not enter a new license code, LiveNote SR Version 10 installs in demonstration mode and offers limited capabilities.

Upgrading Tokens

When you are upgrading from Version 8.3 or Version 9, your tokens are saved, and you can use them in Version 10.

Upgrading from LiveNote Version 8.3 or Earlier

You have two options when you install LiveNote Version 8.3 or earlier:

- You can use Add/Remove Programs to uninstall the earlier version.
- You can leave the old version installed and install LiveNote 10. If you install LiveNote 10 to the default location, the earlier version of LiveNote will not be overwritten and your case files and settings will not be lost.

Note: After you have opened case files in LiveNote 10, you will not be able to open them in Version 8.3 or earlier.

Upgrading from LiveNote 9

Before installing LiveNote 10, you must use Add/Remove Programs to uninstall LiveNote 9. However, your case settings and files will not be lost; you will still be able to access them in LiveNote Version 10.

Upgrading LiveNote Administration and LiveNote Repository

The following conditions apply when updating LiveNote Administration and LiveNote Repository:

- If you upgrade to LiveNote Administration 10, LiveNote Administration 10 looks for a connected Repository and upgrades it automatically.
- The server does not need to be rebooted after Repository is updated, even if the Repository is on a WAN.
- Only connected Repositories are upgraded. If you connect to more than one Repository from a LiveNote Administration workstation, you need to connect to all of them to upgrade them.
- Mixed environments are not supported. Active Directory Integration causes problems if some LiveNote Administration workstations are Version 9 and some are Version 10.

Upgrade Scenario 1: LAN and WAN Repositories

You have three workstations with LiveNote Administration 9 installed. You have two copies of LiveNote Repository installed, one on a LAN and one on a Wide Area Network WAN.

Upgrading for Scenario 1:

LiveNote Administration 9 is upgraded to LiveNote Administration 10 on Workstation 1, which is connected to the WAN Repository. Active Directory Integration is not activated.

LiveNote Administration 10 upgrades the Repository automatically. No reboot of the server is required.

Questions About Scenario 1:

What happens to Workstation 2, which is also connected to the WAN Repository and still on Admin 9?

Workstation 2 needs to be upgraded as soon as possible to Admin 10. It is recommended that, if you upgrade one LiveNote Administration workstation to Version 10, upgrade them all. West, a Thomson Company, does not support a mixed environment. However, because Active Directory Integration was not activated, Workstation 2 should be okay if the upgrade to LN 10 is delayed briefly.

What about Workstations 3 and 4 that use the LAN Repository?

When you upgrade one of the workstations, for example, Workstation 3, it upgrades the Repository that is on the LAN. Workstation 4 needs to be upgraded to LiveNote Administration 10 as soon as possible.

Scenario 2: A Testing Repository and a Live Repository

You have two Repositories installed, one for testing and one for live.

Upgrade Procedure for Scenario 2:

You upgrade from LiveNote Administration 9 to LiveNote Administration 10 on the workstation that is connected to the test site Repository. The Repository is automatically updated. You verify everything works correctly and then want to upgrade the live Repository. From LiveNote Administration, disconnect from the test Repository and connect to the live Repository. The live Repository is then automatically upgraded to LiveNote Administration 10.

Active Directory Integration, LiveNote SR Version 9 Compatibility with LiveNote SR Version 10

It is recommended that you upgrade all your workstations from LiveNote 9 to LiveNote 10. However, if Active Directory integration is *not* enabled, LiveNote 9 projects will open in Version 10, and Version 10 projects will open in Version 9. If Active Directory integration is enabled, LiveNote 9 will not open LiveNote 10 secure cases.

Installing LiveNote SR

You purchase LiveNote SR with a single user license where LiveNote is installed on a single computer. Prerequisites to installing LiveNote SR are:

- Install LiveNote SR on a single computer.
- If you want to work with secure cases (cases with controlled access that can be shared across a network):
 - Install the LiveNote Repository. For instructions, refer to “Installing the LiveNote Repository” later in this document.
 - Install LiveNote Administration. For instructions, refer to “Installing LiveNote Administration” later in this document.
 - License the LiveNote Repository. Refer to “Licensing the LiveNote Repository” later in this document.

LiveNote SR is designed for sharing secure cases with other users on a network. In addition, users can replicate cases to offline if they want to work away from the office. Later, their changes can be integrated back with the case on the network. They can also work on local cases.

Installation

You can purchase LiveNote SR with a single user license and install it on a single computer, or you can purchase multiple licenses that work with LiveNote Repository (the database) and LiveNote Administration, a tool for administering which users have access to cases.

Access Requirements

LiveNote SR users require TCP port 3050 access to the LiveNote Repository. To access your case data, set the permissions for all case data folders to: Change for share permissions and Modify for NTFS permissions. If you will be replicating cases to offline, set the permissions for the C:\Documents and Settings\\Application Data\LiveNote folder as well.

Users' computers must have rights to perform TCP connections to the LiveNote Repository and use Windows authentication mechanisms to access secure case files.

In other words:

Modify NTFS permissions to the Application folder. By default, this is:

```
c:\program files\livenote\livenote
```

Modify NTFS permissions to the Offline folder:

```
c:\documents and settings\\Application Data\LiveNote
```

Modify NTFS and Change Share permissions to the case data folders.

Demonstration Mode

If you do not have a license code, you can install LiveNote SR in demonstration mode. Demonstration mode allows you to:

- Connect to 15 real-time sessions.
- Add annotations and issues.
- Edit annotations.
- Add and remove quick marks.
- Use the basic functions of LiveNote, for example, the Word Wheel and the reports options.

In demonstration mode, printed transcripts include a demo watermark. Additionally, you cannot:

-
- Update transcripts.
 - Create a new case.
 - Close the current case and open another case.
 - Connect to the LiveNote Repository.
 - Add more than three transcripts.
 - Delete transcripts, issues, or annotations.
 - Save transcripts as ASCII files or export cases.

To install LiveNote SR:

1. Access the LiveNote Web site: <http://www.livenote.com/downloads.asp>.
2. Navigate to the download page for the LiveNote 10.0 Software.
3. The setup program guides you through the installation process.
4. If you want to use secure cases, continue with *Installing the LiveNote Repository* on page 12.

Installing LiveNote Administration

Once you have installed the LiveNote Repository, you need to install LiveNote Administration on each LiveNote administrator's computer.

Product Role

LiveNote Administration is used to configure and manage secure cases, user authentication details and access permissions stored in the LiveNote Repository.

Access Requirements

LiveNote Administration requires TCP port 3050 access to the LiveNote Repository, and Windows network share access to the LiveNote secure case files.

Supported Operating Systems

LiveNote Administration can be installed and run on the Windows XP, Windows 2000 and Windows 2003 Server.

Installation Requirements

LiveNote Administration must be installed to a local drive on each LiveNote administrator's computer.

To install LiveNote Administration:

1. Access the LiveNote Web site: <http://www.livenote.com/downloads.asp>.
2. Navigate to the download page for LiveNote 10.0 Administration.
3. The setup program guides you through the installation process.
4. Repeat this procedure until LiveNote Administration is installed on each LiveNote administrator's computer.
5. License the LiveNote Repository. See *Licensing the LiveNote Repository* on page 13.

Installing the LiveNote Repository

You need to install the LiveNote Repository if you are using:

- LiveNote SR and you want to use secure cases.
- LiveNote Web.

Product Role

The LiveNote Repository provides information relating to users, secure cases and their associated access rights.

Access Requirements

The repository is accessed via TCP port 3050.

The LiveNote secure case files are accessed via Windows network share mechanisms and UNC path directives.

You need to ensure the availability of these network services to the LiveNote components that use them.

Supported Operating Systems

The LiveNote Repository can only be installed on Windows 2000, Windows XP and Windows 2003. It cannot be installed on Windows 98 or Windows ME.

Automatic Backup

Once the repository is installed, LiveNote automatically performs a rolling seven-day backup of the repository at 2 AM local time for the machine on which Repository is installed. You can verify this information under Scheduled Tasks in the Control Panel.

For more information about the repository backup, refer to the Readme file located in the LiveNote\Tools\Readme_Backup.txt.

Call LiveNote Technical Support for assistance with restoring backups on 1-800-290-9378.

Installation Requirements

The LiveNote Repository must be installed to a local drive, on a network computer accessible to all LiveNote users and administrators.

Notes:

- The local drive must be denoted by a letter (for example: C:\program files\Repository); the drive cannot be listed as a UNC path (for example: \\program files\Repository).
- You do not need to share the folder where you install LiveNote Repository. The folder exists solely as an application folder.

To install the LiveNote Repository:

1. Access the LiveNote Web site: <http://www.livenote.com/downloads.asp>.
2. Navigate to the download page for the LiveNote 10.0 Repository.
3. The setup program guides you through the installation process.

Licensing the LiveNote Repository


Once you have installed the LiveNote Repository and copies of LiveNote Administration on each LiveNote administrator's computer, you need to license the LiveNote Repository.

You can license the LiveNote Repository from any computer on which LiveNote Administration is installed.

Note: The computer from which you are licensing the LiveNote Repository must be connected to the Internet for the license to be processed automatically.

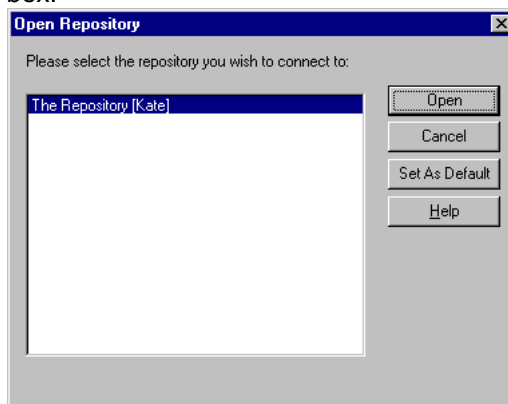
To license the LiveNote Repository:

1. Open LiveNote Administration:

- a. Click the  button. The **Start** menu displays.
- b. Point to **Programs**. The **Programs** list displays.
- c. From the **Programs** list, point to **LiveNote** and click **LiveNote Administration**. LiveNote Administration starts. It automatically searches for repositories on the same subnet and connects to those repositories.

If LiveNote Administration:

- Finds one or more repositories, it displays the repositories in the **Open Repository** dialog box.

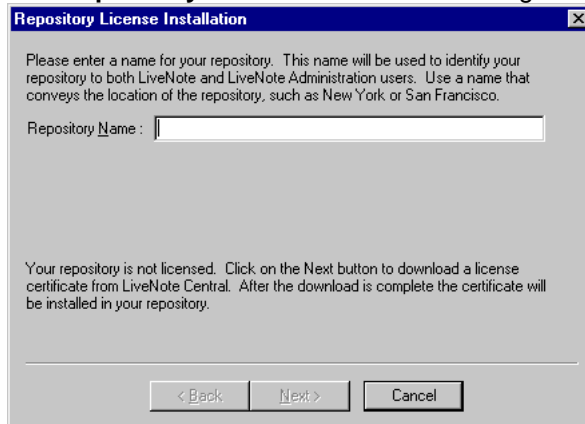


Note: If you have just installed a repository, it is listed as **The Repository [<Computer Name>]**.

- Cannot find any repositories, you are asked if you want to add a repository manually. Click **Yes**. The **Add Repository** dialog box displays. Continue with “Licensing a LiveNote Repository Manually” in the next section.

2. Select the repository that you want to license from the list and click **Open**.

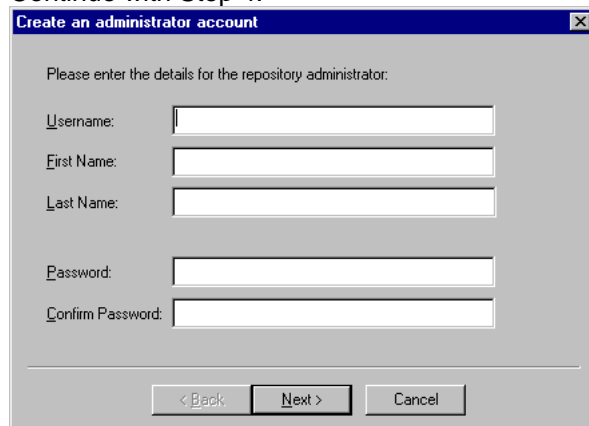
The **Repository License Installation** dialog box displays.



The screenshot shows a dialog box titled "Repository License Installation". The text inside reads: "Please enter a name for your repository. This name will be used to identify your repository to both LiveNote and LiveNote Administration users. Use a name that conveys the location of the repository, such as New York or San Francisco." Below this is a text input field labeled "Repository Name:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

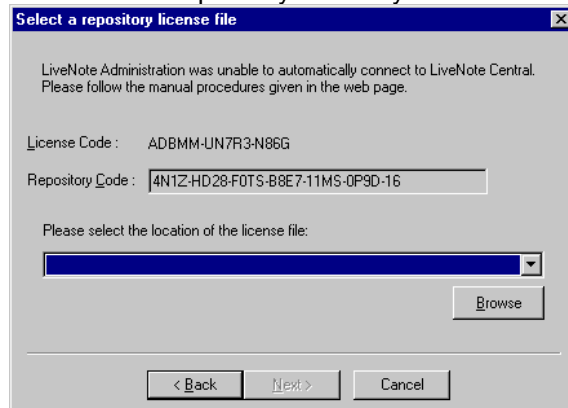
3. In the **Repository Name** field, type a name for the repository and click **Next**. If the computer on which you are working:

- Is connected to the Internet, the **Create an administrator account** dialog box displays. Continue with Step 4.



The screenshot shows a dialog box titled "Create an administrator account". The text inside reads: "Please enter the details for the repository administrator:". Below this are five text input fields: "Username:", "First Name:", "Last Name:", "Password:", and "Confirm Password:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

- Is not connected to the Internet, or LiveNote Administration is experiencing problems licensing your repository, the **Select a repository license file** dialog box displays. You need to license the repository manually. Continue with "Licensing a LiveNote Repository manually."



The screenshot shows a dialog box titled "Select a repository license file". The text inside reads: "LiveNote Administration was unable to automatically connect to LiveNote Central. Please follow the manual procedures given in the web page." Below this are two text input fields: "License Code:" with the value "ADBMM-UN7R3-N86G" and "Repository Code:" with the value "4N1Z-HD28-F0TS-B8E7-11MS-0P9D-16". Below these is a dropdown menu with the text "Please select the location of the license file:" and a "Browse" button. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

-
4. On the **Create an administrator account** dialog box, type the following information:
 - In the **Username** field, type a username for the LiveNote administrator.
 - In the **First Name** field, type the LiveNote administrator's first name.
 - In the **Last Name** field, type the LiveNote administrator's last name.
 - In the **Password** field, type the LiveNote administrator's password.
 - In the **Confirm Password** field, retype the LiveNote administrator's password.
 5. Click **Next**. LiveNote Administration automatically processes the license information, the repository is licensed and the **Repository licensing complete** dialog box displays.
 6. Click **Finish** to close the **Repository licensing complete** dialog box.

Adding a Repository Manually

If LiveNote Administration fails to find the repository that you want to license, you need to add that repository manually on the **Add Repository** dialog box.

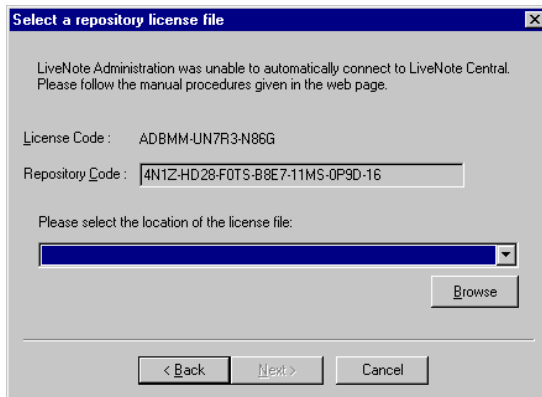
1. On the **Add Repository** dialog box, either:
 - In the **Repository Server** field, type the server name or IP address for the server where the repository is installed.
 - Click **Browse**; then on the **Browse for Computer** dialog box, select the server where the repository is installed and click **OK**. The **Browse for Computer** dialog box is closed.
2. On the **Add Repository** dialog box, click **OK**. A dialog box displays stating that a connection to the repository was successfully established.
3. Click **OK**. The repository displays in the repositories list on the **Open Repositories** dialog box.
4. Continue with *Licensing the LiveNote Repository*.

Licensing a LiveNote Repository Manually

If you try and license a repository and your computer is not connected to the Internet, or LiveNote Administration is experiencing problems licensing your repository, the **Select a license file** dialog box displays. You will need to license the repository manually.

To license a repository manually:

1. Write down the License Code and Repository Code as displayed on the **Select a repository license file** dialog box:



2. On a computer that has access to the Internet, open your Web browser and go to the following Web site:

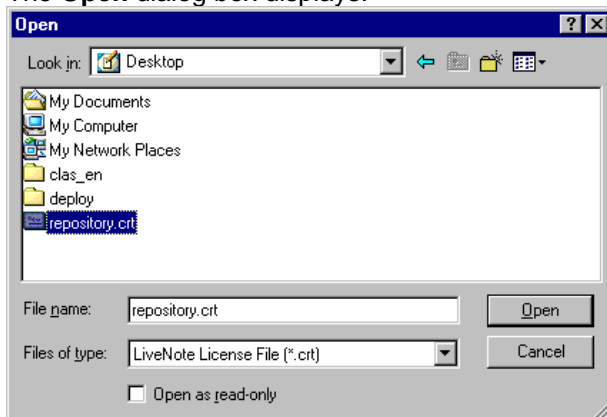
<https://www.livenotecentral.com/a2b/servlet/com.livenote.anon.RegisterProductPost>

3. Enter the requested information and click **Generate License**.

The **Your New License** Web page displays.

4. Copy the text in the license data from the box on the **Your New License** Web page.
5. Open a text editor, such as Notepad or WordPad; create a new document and paste the license data into the document.
6. Save the document as **repository.crt**.
7. Transfer the file, **repository.crt**, to the computer on which you are licensing the repository.
8. On the **Select a repository license file** dialog box, click **Browse**.

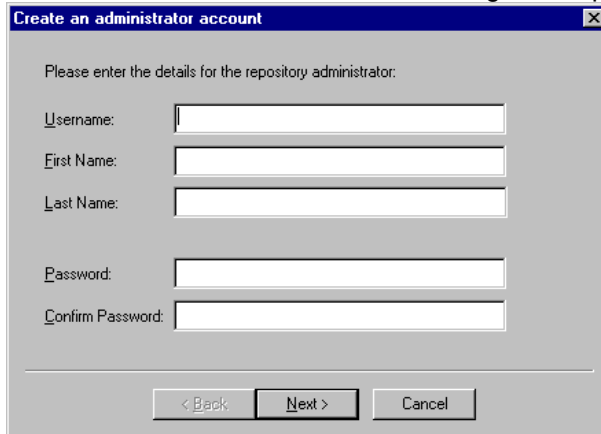
The **Open** dialog box displays.



9. Move to where **repository.crt** is located and click **Open**. The **Open** dialog box closes and the path to the license file displays on the **Select a repository license file** dialog box.

10. Click **Next**.

The **Create an administrator account** dialog box displays.




11. On the **Create an administrator account** dialog box, type the following information:

- In the **Username** field, type a username for the LiveNote administrator.
- In the **First Name** field, type the LiveNote administrator's first name.
- In the **Last Name** field, type the LiveNote administrator's last name.
- In the **Password** field, type the LiveNote administrator's password.
- In the **Confirm Password** field, retype the LiveNote administrator's password.

12. Click **Next**.

The repository is licensed and the **Repository licensing complete** dialog box displays.



13. Click **Finish** to close the **Repository licensing complete** dialog box.

Note: Additional administrators can be added via LiveNote Administration. See the *LiveNote Administration Online Help*.

Using Active Directory Authentication

Active Directory Authentication is similar to NTLM Authentication. In practice, it means users of secure LiveNote cases log in with their network user name and password. Technically, it means LiveNote Repository compares its user names with the user names in Windows Server 2003 Active Directory. Users who do not exist in Active Directory cannot log in to LiveNote Administration, do not have access to LiveNote Repository, and therefore cannot access secure cases with the LiveNote desktop application.

Using the AdminTool

The LiveNote AdminTool imports users and groups from Active Directory into LiveNote Repository. When you type help from the command line, the following information displays:

Type topic text here.C:\Program Files\LiveNote\Administration>admintool.exe /?

```
ADMINTOOL username/password [/SERVER:hostname[:port]]
           [/USERS | /USERGROUP:group1[+group2][+group3]...]
           [/GROUPS]
           [/DEFAULTPASS:pw]
           [/USERTYPE:ExternalUser|ReaderUser|AuthorUser|
           EditorUser|PowerUser|CaseManager]
           [/ADMINPRIV] [/REPLICATEPRIV] [/POWEREDITORPRIV]
           [/LNSEAT] [/LNWEBSEAT]
```

username/password Username and password of LiveNote Repository administrator.

/SERVER:hostname[:port]

Specifies the name and optionally, the port of the LiveNote Repository. If this parameter is not specified, AdminTool will look for a default Repository in the user section of the registry.

/USERS Import all users in the ActiveDirectory.

/USERGROUP:group1[+group2][+group3]...

Import all users in the specified groups. In addition, a Repository group will be created for each corresponding Active Directory group.

/GROUPS Import all Active Directory groups (does not import users in groups).

/DEFAULTPASS:pw

Specifies the default password to assign to each user created. If the Repository is configured to authenticate users using Active Directory this parameter will be ignored.

/USERTYPE:ExternalUser|ReaderUser|AuthorUser|EditorUser|PowerUser|CaseManager

Specifies the user type of each user created during the import.

/ADMINPRIV Apply administrator privileges to each user created.

/REPLICATEPRIV Apply replicate privileges to each user created.

/POWEREDITORPRIV Apply power editor privileges to each user created.

/LNSEAT Allocate LiveNote seat to users created if seat is available.

/LNWEBSEAT Allocate LiveNote web seat to users created if seat is available.

Chapter 3: Installing the LiveNote Enterprise Server

Note: For LiveNote Enterprise Server to work correctly, it is recommended that you install LiveNote Enterprise Server before installing LiveNote Web.

Licensed LiveNote Repository Required on the Same Machine

Before you install LiveNote Enterprise Server on the same machine, verify that you have installed LiveNote Repository and LiveNote Administration and that you have licensed LiveNote Repository. Refer to “Licensing the LiveNote Repository.”

LiveNote Enterprise Server Permissions

The LiveNote Enterprise Server is installed as a system service and, by default, runs under the “LocalSystem” user account. This may cause permission issues when accessing the LiveNote secure case files via Windows network share mechanisms. Therefore, LiveNote Enterprise Server must have its own account with share permissions set to Change and NTFS permissions set to Modify.

Product Role

The LiveNote Enterprise Server acts as the interface between LiveNote Web and the LiveNote Repository, providing repository and case file information to LiveNote Web.

Secure Connection

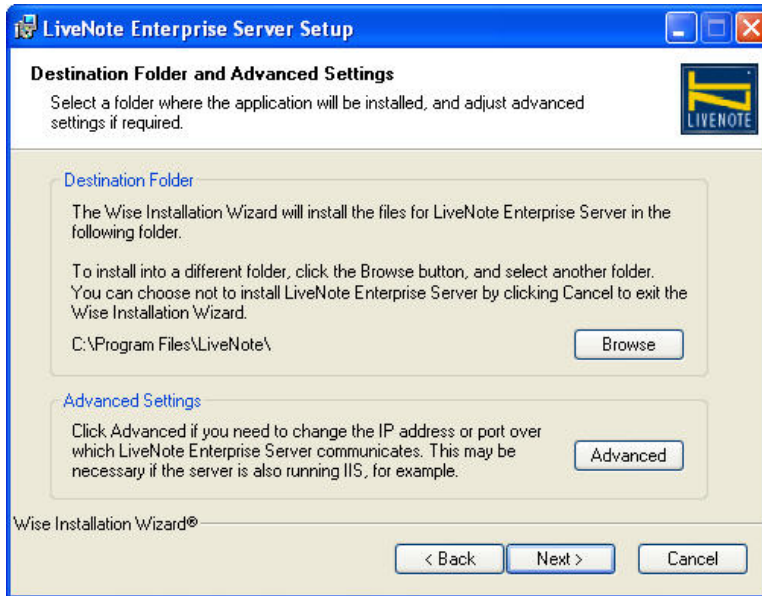
The LiveNote Enterprise Server delivers its services over a secure, encrypted access channel to remote users. By default, this is over TCP port 443, although this can be configured to meet your needs. This reduces firewall management for external Internet access, as most firewalls leave port 443 open by default.

Note: If you install LiveNote Enterprise Server on the same machine as IIS (Internet Information Services) you will need to adjust the default port settings; otherwise, IIS and LiveNote Enterprise Server will try to use the same port.

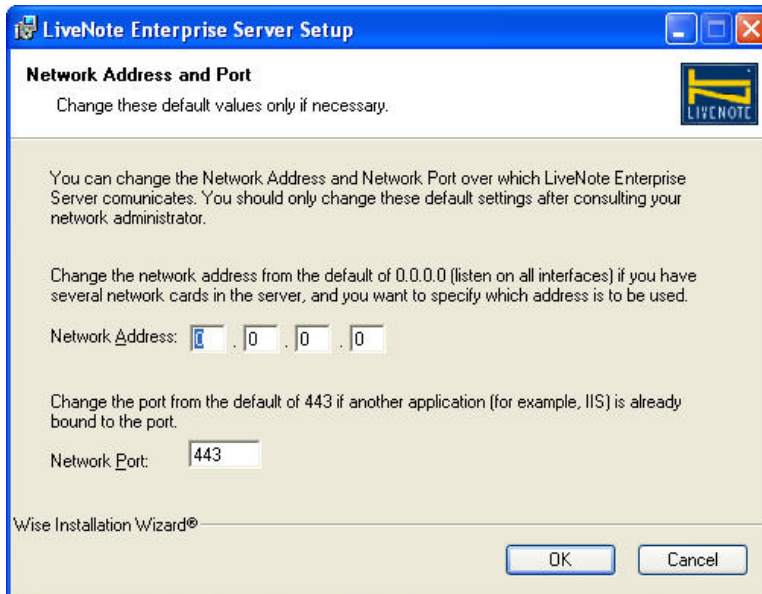
If You are Already Using Port 443

If you are already running a program on the repository computer that is using port 443, you will need to change the port used by the LiveNote Enterprise Server.

From the **LiveNote Destination Folder and Advanced Settings** dialog box during installation, click **Advanced**.



The Network Address and Port dialog box displays.



By default, the Network Address is set to all 0s to bind to all network addresses in the server. If desired, change the Network Address to a specific IP address. You can also change these settings by editing the `las.ini` file in the folder where the Enterprise Server was installed (typically `C:\ProgramFiles\LiveNote\Enterprise Server\elas.ini`). Under the `[TLS]` section, change `port= 443` to `port = 1443`, for example.

When you connect to LiveNote Web, you must also change the **Server Port** setting from the default of 443. From the **Connect** dialog box, click **Advanced**, type the appropriate port number in the **Server Port** field, and click **OK**.

Access Requirements

As the LiveNote Enterprise Server verifies data manipulation requests for the LiveNote Web client, the server requires both TCP access to the LiveNote Repository and Windows network share access to the LiveNote secure case files.

Supported Operating Systems

LiveNote Enterprise Server can only be installed on Windows 2000, Windows XP and Windows 2003.

System TEMP Environment Variable Required

The LiveNote Enterprise Server indexing functionality requires that you set a TEMP or TMP system environment variable. The user account under which the Enterprise Server service is running must have full access to the folder this variable points to.

Installation Requirements

The LiveNote Enterprise Server must be installed to a local drive, on the same computer as the LiveNote Repository.

Notes:

- The local drive must be denoted by a letter (for example: C:\program files\Repository); the drive cannot be listed as a UNC path (for example: \\program files\Repository).
- You do not need to share the folder where you install LiveNote Repository. The folder exists solely as an application folder.

To install LiveNote Enterprise Server:

1. Access the LiveNote Web site: <http://www.livenote.com/downloads.asp>.
2. Navigate to the download page for LiveNote Enterprise Server.
3. The setup program guides you through the installation process.

Chapter 4: Creating a System Repository

LiveNote Administration enables you to create a system repository by exporting the settings of a particular repository to a registry update file. You can use this file to update the registry on the computers on which LiveNote is installed.

Once the registry is updated, everyone who uses LiveNote on that computer can view and access the particular repository automatically (that is, without having to add the repository to the repositories list in LiveNote).

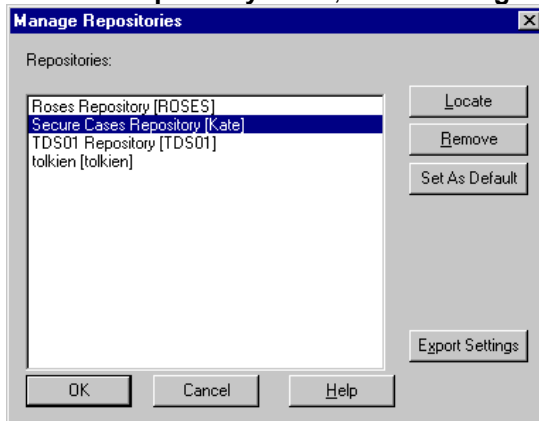
Users cannot remove a system repository from the repositories list in LiveNote.

Exporting Repository Settings

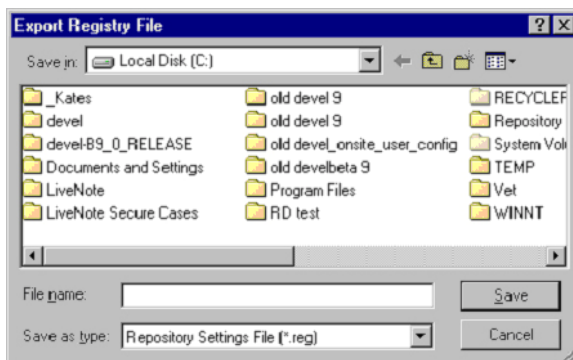
Note: In the future, if you move LiveNote Repository to a new server, you need to update the registry key on each user's workstation.

To export repository settings:

1. Open LiveNote Administration.
2. From the **Repository** menu, select **Manage**. The **Manage Repositories** dialog box displays.



3. Select the repository.
4. Click the **Export Settings** button. The **Export Registry File** dialog box displays.



5. Move to where you want the file to be located.
6. In the **File Name** field, type a name for the registry file.
7. Click **Save**.

8. Click **Close** to close the **Manage Repositories** dialog box.

Updating a Computer's Registry

To update a computer's registry with the registry file:

1. Copy the registry file to the computer.
2. Double-click the file. The registry updates.

Chapter 5: Installing and Customizing LiveNote Web

Installing LiveNote Web

Product Role

LiveNote Web is a Web-based program that provides basic transcript management functionality, enabling users to access and work with secure cases stored on the office server while out of the office.

Additional Software

Prerequisites for installing LiveNote Web include: LiveNote Repository, LiveNote Administration, LiveNote Enterprise Server programs, and IIS.

Active Directory Authentication

Active Directory Authentication is not compatible with LiveNote Enterprise Server version 9. Therefore, if you use Active Directory Authentication with LiveNote Administration, you will not be able to log in to LiveNote Web.

Secure Connection

LiveNote Web connects to the LiveNote Enterprise Server across the Internet or Intranet over a secure access channel on port 443, although this can be configured to meet your needs. This reduces firewall management for external Internet access, because most firewalls leave port 443 open by default.

Browser Types Supported

Because LiveNote Web is an ActiveX control, users can only use this product from Internet Explorer 5.5 and above.

Customizing LiveNote Web

Once you have installed LiveNote Web, you can customize it. Refer to “Customizing LiveNote Web.”

LiveNote Web ActiveX

The LiveNote Web ActiveX client is delivered to users from a Web server. LiveNote Web should normally be installed on the same computer as your firm’s Web server.

Software and License Prerequisites

Before installing LiveNote Web you must:

- Install the LiveNote Repository. Refer to “Installing LiveNote Repository.”
- Install LiveNote Administration. Refer to “Installing LiveNote Administration.”
- License the LiveNote Repository. Refer to “Licensing the LiveNote Repository.”
- Install the LiveNote Enterprise Server. Refer to “Installing the LiveNote Enterprise Server.”
- Install LiveNote Web on the same computer as your firm’s IIS Web server. Refer to “Installing and Customizing LiveNote Web.”

To install LiveNote Web:

1. Access the LiveNote Web site: <http://www.livenote.com/downloads.asp>.
2. Navigate to the download page for LiveNote Web 1.0.
3. The setup program guides you through the installation process.
4. Install LiveNote Enterprise Server on the computer on which the LiveNote Repository is installed. Refer to "Installing the LiveNote Enterprise Server."

Customizing LiveNote Web

LiveNote supplies a sample HTML file, which can be customized for your purposes. It demonstrates embedding the LiveNote Web ActiveX control in Internet Explorer.

The control is customizable by adding parameters to the embedded **<OBJECT> HTML** tag, as follows:

```
<PARAM name="[Name]" value="[Value]">
```

Where:

[Name] is the parameter name.

[Value] is the parameter value.

Example

To specify the URL for the host address to a firm's Web site at www.myfirm.com, you would embed the following, using the HostAddress parameter:

```
<PARAM name="HostAddress" value="www.myfirm.com">
```

Then, when the user logs on to LiveNote Web, the host address is already provided for them and they only need to type in their username and password.

A list of available parameters is shown below.

Add this...	To specify...
HelpURL	The URL address for the online help.
HostAddress	The host address.
HostPort	The host port.
ProxyAddress	The proxy address.
ProxyPort	The proxy port.
Username	The user's username.
Password	The user's password.

Customizing LiveNote Web Using Server Side Technology

You could have the HTML text containing the LiveNote Web **<OBJECT>** tag generated from a server side technology such as Microsoft's ASP or ASP.Net. This provides flexibility for pre-configuring aspects of the LiveNote Web control tailored to your users' needs (for example, configuring the LiveNote Enterprise Server host).

Note: The HTML file provided by LiveNote is intended as a template only. For more information about using server side technology for pre-configuring LiveNote Web, consult your IT staff.

Chapter 6: Installing and Setting up LiveNote Portal & Cost Recovery

LiveNote Portal provides a server side and client side scripting interface to access a subset of information from the Repository Service via the standard Windows COM interface.

This means any COM enabled technology can use this component to integrate information from the LiveNote Data Repository into another program; for example, a Web portal. This component can retrieve case lists for specified users, and transcript lists for specified cases.

For more information about using LiveNote Portal, refer to the technical notes in the Documentation folder where the LiveNote Portal is installed (typically C:\Program Files\LiveNote\Portal\Documentation).

Access Requirements

If the secure case files are stored on a different computer from where LiveNote Portal is being run, refer to "Setting up Access to Secure Case Files on Another Computer."

Ports

The host port for LiveNote Portal must be the same as the host port for LiveNote Enterprise Server.

To install LiveNote Portal:

Note: Before installing LiveNote Portal, verify IIS is running.

1. Access the LiveNote Web site: <http://www.livenote.com/downloads.asp>.
2. Navigate to the download page for the LiveNote Portal & Cost Recovery.
3. The setup program guides you through the installation process.

Setting up Access to Secure Case Files on Another Computer

If the secure case files are stored on a different computer from where LiveNote Portal is being run, you need to do the following:

1. Create the site for your portal. (Copy the sample files from the Portal installation to the desired folder).
2. Create a **Virtual Directory** for this site.
 - a. Open **Internet Information Services**. Right-click the **Default Web Site** for your computer in the left pane and click **New -> Virtual Directory**. The **Virtual Directory Creation Wizard** displays.
 - b. Follow the steps in the wizard to create the virtual directory.
 - c. On the **Access Permissions** page, only **Read** and **Run Scripts** permissions are required to run the sample portal.
 - d. The new virtual directory appears in the left pane.
3. Right-click the new **Virtual Directory** you have created and click **Properties**.
4. Click the **Directory Security** tab.
5. Under **Anonymous Access and Authentication Control**, click **Edit**. The **Authentication Methods** dialog box displays.
6. Under **Anonymous Access**, click **Edit**. The **Anonymous User Account** dialog box displays.
7. Enter the username and password for a user that has access to the case files for all secure cases in the repository.
8. Click **OK** to close all open dialog boxes.
9. Close **Internet Information Services**.

Setting up LiveNote Cost Recovery

Cost recovery allows you to review LiveNote cases to determine how many transcripts you have processed for specific customers.

The program has been designed for installation by trained IT personnel. Installation requires an understanding of Internet Information Services and IP addresses. If you are not an IT expert, do not attempt to install LiveNote Cost Recovery.

Read Me First

LiveNote Portal Cost Recovery installs a file called ReadmeFirst.txt. You cannot successfully install and use LiveNote Portal Cost Recovery without following the instructions in the document. For your convenience, the contents of the document are reproduced below:

```
*****  
*****  
  
BEFORE RUNNING THE LIVENOTE PORTAL COST RECOVERY TOOL  
*****  
*****
```

Below is an overview. For detailed instructions, download:

<http://www.livenote.com/Downloads/portal-cost-recovery-install.pdf>

1) The folder CostRecovery must be copied to C:\InetPub, then made virtual in IIS.

2) Edit the file global.asa; replace "ABCDE-ABCDE-ABCDE" with your portal registration code.

If you have not installed portal in the default location, enter on the next line the correct path to the file Inrepositint.ini. Lastly, if your repository is located on another server, enter the correct IP address.

Lines to be edited in the file global.asa:

```
***** Edit these three lines as described in ReadmeFirst.txt *****  
,  
  
Application("PortalRegCode") = "ABCDE-ABCDE-ABCDE"  
Application("IniFile") = "c:\Program Files\LiveNote\Portal\Inrepositint.ini"  
Application("RepositoryIP") = "127.0.0.1"  
,  
  
*****
```

Software Requirements

Below are the software requirements for the LiveNote Cost Recovery program.

- Internet Information Services (IIS).
- LiveNote Administration (and cases from LiveNote). You use your administrator user name and password for the Cost Recovery program.
- LiveNote Repository.
- LiveNote Portal.
- LiveNote Portal must be installed on a server with IIS running.

Overview of Tasks

Detailed procedures are later in this chapter.

1. Install the latest version of LiveNote Portal: <http://www.livenote.com/downloads.asp>.
2. Copy the Cost Recovery folder to the INETPub folder.
3. Edit the Global.asa file in the INETPub\CostRecovery folder. Copy the Portal Registration Code to the **PortalRegCode** field.
4. In IIS, create a virtual directory.
5. Browse from the virtual directory to start the Cost Recovery program.
6. Log in with your LiveNote 10 Administration password.

Copying Files to the INETPub Folder, Editing Global.asa

The next steps involve copying the files to the INETPub folder and then editing the global.asa file. The INETPub folder is only available if you have IIS running on the server.

Note: Do not copy the files from the Program Files directory.

To copy the files:

1. Navigate to the directory where you installed CostRecovery. The default location is:
C:\Program Files\LiveNote\Portal\
2. Click the Cost Recovery folder and copy it.
3. Navigate to the INET Pub folder (for example, C:\Inetpub) and copy the CostRecovery folder to it. This action creates a folder called CostRecovery, which contains all the relevant files.

To edit the global.asa file:

1. Open the folder you created in the previous steps (for example: C:\Inetpub\CostRecovery).
2. Right-click **global.asa** and choose a program to edit it, for example, Notepad. Notice the text that reads:

```
***** Edit these three lines as described in ReadmeFirst.txt *****!
```

```
Application("PortalRegCode") = "ABCDE-ABCDE-ABCDE "  
Application("IniFile") = "c:\Program Files\LiveNote\Portal\Inrepositini"  
Application("RepositoryIP") = "127.0.0.1"
```

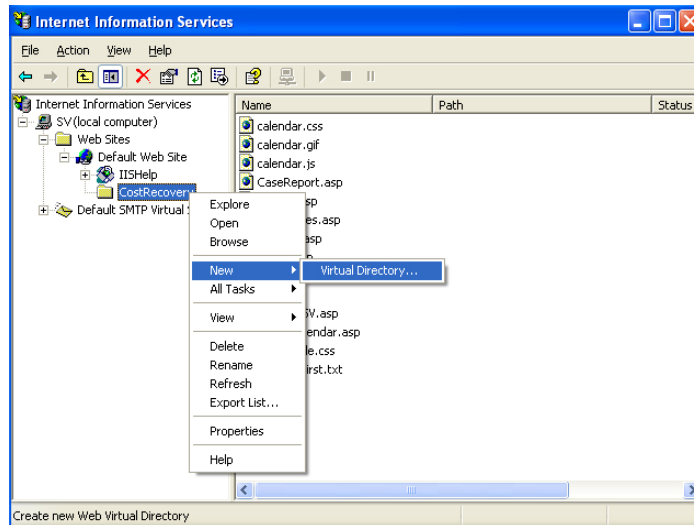
```
*****!
```

3. Copy the License Code you used during the LiveNote Portal installation to the **PortalRegCode** field. That is, replace **ABCDE-ABCDE-ABCDE** with the License Code.
4. If you did not use the default installation, change the path in the IniFile field.
5. If LiveNote Repository does not reside on the server where you installed LiveNote Portal, change the RepositoryIP field to the IP address of LiveNote Repository.

Creating a Virtual Directory in IIS

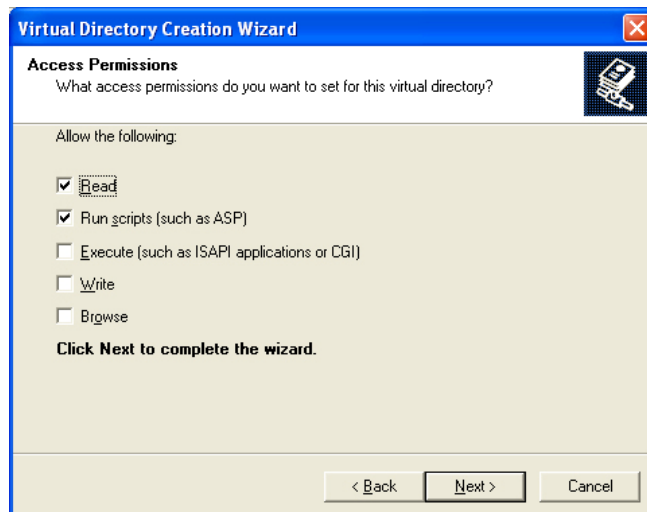
To create virtual directory in IIS:

1. Open Control Panel.
2. Double-click **Administrative Tools** and then double-click **Internet Information Services**.
3. Click the **Plus Sign (+)** to the left of the server name.
4. Click the **Plus Sign** to the left of the Web Sites folder.
5. Right-click the **Default Web Site**, hover your cursor over **New**, and then click **Virtual Directory**.



A wizard opens.

6. Click **Next**.
7. Type a meaningful name or abbreviation for the CostRecovery program and then click **Next**. The Web Site Content Directory dialog box opens.
8. Click the **Browse** button to navigate to the location of the CostRecovery folder, (for example, C:\Inetpub\CostRecovery).
9. After you enter the path and click **Next** the Access Permissions dialog box opens.



10. Click **Next** to accept the default settings.

11. Click **Finish**.

Opening Cost Recovery from IIS

To open the Cost Recovery program from IIS:

1. Right-click the **virtual folder** you created in the procedure above and then click **Browse**.
2. Type your LiveNote Administration user name and password.

Making LiveNote Cost Recovery Available to Others

You can make LiveNote Cost Recovery available as a Web page.

Notes:

- Anyone who uses Cost Recovery needs a LiveNote Administration user name and password (open LiveNote Administration, click the **User** menu, click **New**, and follow the directions on the screen).
- You can assign DNS servers, give the site a domain name, and forward the domain name to others.
- You can distribute the IP address for Intranet use.
- For Intranet use, the server's firewall settings need to leave Port 80 open for internal use.
- If you have multiple Web sites on the server, make sure in IIS you select the properties of the site and apply the correct IP address.

Instructions for Users

Cost Recovery resides on a server that your company owns. You need to work with your IT department to access the Cost Recovery program.

Notes:

- Anyone who uses Cost Recovery needs a LiveNote Administration user name and password (open LiveNote Administration, click the **User** menu, click **New**, and follow the directions on the screen).
- The recommended browser is Internet Explorer 6.

To use Cost Recovery:

1. Visit the site that your IT department provides.
2. Complete the fields as follows:
 - **Username:** Type your LiveNote Administration user name.
 - **Password:** Type your LiveNote Administration password.
 - Select a date as follows:
 - **Start Date:** Click the drop-down lists next to the numbers to select the starting date for the report.
 - **End Date:** Click the drop-down list next to the numbers to select the ending date for the report.
3. Click **Go**. The LiveNote Subscription Use Report opens. The following is an excerpt of the report that shows the case, transcripts in the date range, and the percent of total.

CASE NAME	TRANSCRIPTS IN DATE RANGE	% OF TOTAL
Demonstration Case	8	50.00%
smith_v_jones	7	43.75%
berg v palm	1	6.25%
TOTAL	16	100.00%

4. The report indicates the Demonstration Case includes 8 transcripts and that the Demonstration Case represented 50% of LiveNote usage.
5. Click **Output CSV** to generate a spreadsheet of the data. The File Download dialog box opens.
6. Click **Save** and save the file to your computer.

After the file is saved, click **Open**. The spreadsheet opens in whichever spreadsheet program is available.

Chapter 7: Performing an MSI Silent Install

To run a 'silent' installation (no user input required) for a MSI file, you must type an `msiexec` command with appropriate switches and parameters at a command line prompt.

```
msiexec /qn /i <msifilename> <parameterlist>
```

There are both mandatory and optional parameters. Mandatory parameters must be included for the installation to proceed.

Example

An example silent installation command is shown below:

```
msiexec /qn /i LN91200126.msi LICENSECODE="LNXXX-XXXXX-XXXXX"  
INSTALLDIR="C:\LiveNote" USERNAME="User" COMPANYNAME="Company"  
NETWORKPROMPT="0" OFFLINEPROMPT="0"
```

Note: The serial number shown above is not a valid license code. It is similar in structure and is for illustrative purposes only.

Valid Parameters

LICENSECODE = "LNXXX-XXXXX-XXXXX"

(mandatory)

This must be a valid license code for the product being installed. If the license code is invalid, the installation terminates without an error message.

USERNAME="John Citizen"

(optional)

If this parameter is not specified, the current user's Windows logon user name is used.

COMPANYNAME="My Organization"

(optional)

If this parameter is not specified, the Windows registered organization is used.

INSTALLDIR="c:\my folder"

(optional)

If this parameter is not specified, LiveNote is installed to the default installation folder (c:\program files\livenote). You must type the full path to the required installation folder. LiveNote is installed in a folder named livenote under the installation folder.

NETWORKPROMPT=0

(optional)

If this parameter is not specified, the default setting is that the LiveNote user is prompted to replicate offline cases back to the network when opening LiveNote. Set this parameter to '0' to suppress this prompt as a default setting. The LiveNote user can choose to turn the prompt on through the UI after installation. Use this option carefully. If you cancel before replication is complete, possible issues may occur.

Note: Only set this option to `NETWORKPROMPT=1` for users who work offline frequently. Sometimes users who rarely work offline will turn off the computer in the middle of the replicate process, resulting in problems that require a call to LiveNote Technical Support for resolution.

OFFLINEPROMPT=1

(optional)

If this parameter is not specified, the default setting (`OFFLINEPROMPT=1`) prompts the user to replicate shared cases to the offline when closing LiveNote. Set this parameter to 0 to suppress this prompt as a default setting. The LiveNote user can choose to turn the prompt on through the UI after installation.

Contacting LiveNote

There are a number of ways to contact LiveNote.

Telephone

You can call us in the USA by dialing 1-800-290-9378.

Email

Email us at west.livenote@thomson.com.

Visiting the LiveNote Web Site

You can also visit our Web site at www.livenote.com. The Web site contains the latest software and information about new products and services available from LiveNote.

Appendix A: Components of the LiveNote Software Suite

