Infinitylaw

Infrastructure Installation & Support Guide

SQL Server, Clients, Printers

29 March 2019

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Introduction

Infinitylaw is a practice management system for law firms. It is developed, distributed, and supported by Thomson Reuters New Zealand.

Purpose of notes

These notes are provided to give precise details the infrastructure environment needed to operate Infinitylaw.

Ongoing Support of Infinitylaw

All law firms using Infinitylaw have a formal support agreement with us and this includes a confidentially agreement as in the course of providing support we need to have full remote access to the server that hosts Infinitylaw.

Infinitylaw support is provided by logging calls on our portal https://portal.infinitylegal.net

Depending on the nature of the call support may be chargeable. e.g. for training type calls or for problems that turn out to be hardware faults. Each firm is able to set up for themselves who can access the portal for accessing the Infinitylaw knowledge base and users guides and who can log support calls. All firms restrict who can log calls as otherwise many calls for information that is already available within the firm may be made and may incur unnecessary cost.

It is possible that you will get calls from Infinitylaw users on Infinitylaw topics. Our recommendation is that you suggest to the caller that they take the matter up with their internal system administrator. The same applies to the situation where you believe you have found a problem that is due to Infinitylaw because unless it turns out to be actual Infinitylaw software fault it will very likely be chargeable to the firm, and that includes if the configuration in this document is not followed precisely. We will always provide support if it is within our scope but it is best if the customer logs all calls as they are paying the costs.

Demarcation

As you will see from this guide we are very keen to get a clear mutual understanding of our respective roles so that our mutual customer gets the best possible value from their IT investment. We are an application software supplier and will not be interfering in your areas of expertise. At the same time we will not be taking responsibility for any problems related to infrastructure, just our software.

IT SUPPLIER RESPONSIBILITIES

Initial	Ongoing

▪ **Building the server**
 	
    This includes installing Microsoft SQL Server as per page 10
 	
▪ **Building PCs**
 	
▪ **Installing printers**
 	
    Normal windows installation plus setting up in Infinitylaw as per page 17
 	
▪ **Loading Infinitylaw on PCs** As per page 20
 	
▪ **Setting up backup systems**
 	
    The backup needs to include the backup directory which will hold SQL Server database dumps
 	
● **Setting up TAPI Interface on PCs** If the Infinitylaw Telephone System is being used.
	▪ **Service packs**
	
	    Ensuring all service packs for Windows, MS Office and SQL Server are loaded as they are issued.
	
	▪ **Reboot the server after any software installations or upgrades other than Infinitylaw.**
	
	    This is essential to ensure essential Infinitylaw processes are running.
	
	    The server must **NOT** be set for automatic deployment of any server software as this will stop the essential processes.
	
	▪ **Adding/replacing PCs**
	
	    These notes provide the information needed to install Infinitylaw on PCs being rebuilt or added.
	
	▪ **Adding/replacing Printers**
	
	    These notes provide the information needed to install printers within Infinitylaw.
	
	▪ **Support of backup systems**
	
	▪ **Support of remote access**
	
	▪ **Support of TAPI interface**

INFINITYLAW RESPONSIBILITIES

Initial	Ongoing

▪ **Installing Infinitylaw on the server**
 	
    This includes creating databases
 	
▪ **Setting up database dumps**
 	
    The dumps go to the directory to be included in backups
	▪ **Support of Infinitylaw**
	
	    Support of all aspects of the Infinitylaw software. This excludes infrastructure and third party software products.
	
	▪ **Support of Infinitylaw databases**
	
	    Support of all aspects of Infinitylaw databases. This does not include the installation of SQL Server Service packs.
	
	▪ **Data migration**
	
	    Migration of databases when servers are upgraded or re-built.

System Requirements

Infinitylaw requires appropriately configured infrastructure to operate effectively with good speed and response times. The minimum requirements below are designed to be used when evaluating the suitability of existing hardware. The recommended configurations should be used for all new hardware.

Infinitylaw
Required Infrastructure
March 2019

In-House or Hosted Infrastructure

In-House Infrastructure

In-House Infrastructure is where the Infinitylaw Database Server is located in your office and is not shared by other parties. PCs within the office connect to the Database Server via a physical network or by Wi-Fi. You may also have a Terminal Server(s) for in-house use or remote access. All of the details in the following sections apply to In-House Infrastructure.

Hosted Infrastructure

If you are using an external service such as a Datacenter for your Infinitylaw Database Server and the Terminal Server(s) you need equipment with the same specifications as for Local Infrastructure. In addition to that the Database Server and Terminal Server(s) must not be shared with other entities without specific agreement by Thomson Reuters. Sharing of resources could violate Thomson Reuters intellectual property rights and could also result in Infinitylaw software updates being applied to the other parties sharing the servers causing operational problems for them.

The SQL Server and Terminal Server(s) must be local to each other, on the same LAN and in the same Datacentre. Connecting a hosted SQL Server to remote PC's (or vice versa) via VPN or WAN link is not permitted.

Database Server

Industry standard server hardware that is less than 5 years old

TCP /IP. Server must not be operating as a terminal server

Windows 2012 or later with latest service pack

SQL Server [1] 2012 or later installed as a Default Instance with latest service pack and with SQL Reporting Services

SQL Server must be used for the Infinitylaw database

Microsoft.Net Framework 4.5 or higher

IIS (Internet Information Services) [2]

A secure VPN product using broadband access with static IP address for ongoing software support. **Note**: PPTP is not permitted as a VPN security protocol

Server and PCs must be in a domain

Servers and Workstations must be part of a domain with Windows authentication for SQL Server.

Do not set auto Windows updates on the server as this will stop essential processes needed by Infinitylaw.

(1) Microsoft SQL Server is available in four commonly used versions:
  - **MS SQL Server Express** with Advanced Services (for full text indexing) is a free version which will operate on x32 and x64 hardware. Will use only one CPU and 1GB RAM so performance could become a problem with more than 10 users. It has a maximum database size of 10GB which should be sufficient for up to 10 users. Must be the version with Advanced Services and the full text search add-on must be installed.
  - **MS SQL Server Standard** comes with Windows SBS 2008 premium edition. We believe that it should be sufficient for firms from 10 to 150 users. It will use the lesser of four CPUs or 24 cores, and allow the use of up to 128GB of system RAM
  - **MS SQL Server Enterprise** edition should be considered for very large numbers of users as it will use the maxium CPU & RAM that the operating system supports.
  - **MS SQL Server Compact** is not suitable for Infinitylaw.

(2) Free add-on software

System Requirements

PC Workstations and Remote Session requirements

Industry standard PC hardware that is less than 5 years old

Screen resolution set to minimum of 1920 x 1080 pixels or greater, with 32-bit colour depth required.

Windows 7 or later   Note: If Office 365 is being used each PC must have a local installation of MS Outlook for saving emails to IDM (Infinitylaw Document Management)

Microsoft .NET Framework 4.5 or higher

Microsoft Data Access Components and ADO Admin are also required but are installed automatically by the Infinitylaw Installation wizard

To enable installation of Infinitylaw updates Users require Local Admin rights with modify rights for the Infinitylaw client directory (Default is: C:\Legal) and registry access.

Windows versions are supported for 5 years from the date they were last current. They may continue to operate satisfactorily after that but any problems related to the outdated version will not be covered by support.

Infinitylaw can operate in most areas in a Thin-Client environment. In this environment the configuration of the terminal server(s) needs to be sufficient to provide the equivalent resources to each user as recommended above. Areas which have been known to have limitations in a Thin-Client environment are: operating scanners in the Document Management System, and running the interface to On-line banking. A Fat-Client may be needed for users of these facilities.

PC Third Party Software

Designated Third Party software will be required on PCs in order to run Infinitylaw as follows:

- Internet Explorer 11 or later with an up to date service pack.
- Adobe Reader DC or later with an up to date service pack. Required for handling PDFs in Infinitylaw Document Management

Microsoft Office Interfaces

To use the optional MS Office interfaces of Infinitylaw the following products and versions are required:

- If Workflow and/or IDM (Infinitylaw Document Management) modules are to be installed MS Outlook and MS Word are required. These **need to be the 32 bit versions**, all with the latest services packs are required on each PC. If IDM is to be used Word must be able to open a blank page without a macro controlling this.
- If the Microsoft Access Infinitylaw linked database is installed for ad hoc reporting Access 2010 32bit or later is required on the PCs that will use the linked database.

Printers

Infinitylaw is tested and guaranteed to print correctly on HP laser printers up to five years old. Many other types and ages of laser and inkjet printers are used satisfactorily, including many brands of copier-printers, but the performance of printers is dependent on their manufacturer and outside Thomson Reuters' control. The installation of printers on a network, especially networks with Terminal Servers should be done by a suitably qualified engineer. Infinitylaw support does not cover installation of printers or diagnosis of networked printer problems.

Telephone System

To use the Infinitylaw Telephone System module for dialing out, incoming caller recognition, and outward call charging the PABX needs to have TAPI 2.0. The TAPI drivers for the phone system must be installed on every PC. A test program is available to check that it is installed correctly and that Infinitylaw can connect to it. A variety of different manufacturers systems are suitable.

Extranet

It is recommended that the Infinitylaw Extranet is operated on its own server outside the firm's firewall. Please see separate Extranet document for details.

Web Service for iAuthor

When setting up a web service on the network server for synching with the iPhone iAuthor time recording app it is essential that this is set up as a secure service with a web service address like: https://lawfirmname/iPhoneService

Importing Documents

If you wish to have documents imported into IDM (Infinitylaw Document Management) it is necessary for the client, matter, deed for the documents or image to be recognisable from the file or directory name. If Deed images are stored in your system they can be imported into Infinitylaw. For client and matter related documents stored outside your Practice Management System it is usually possible to import them if there is a consistent structure to directories in which they are held. e.g. 100024 Anderson A B\1 Purchase 200 High Street. Documents just in the client directory would be linked to the client in Infinitylaw. Documents in the matter directory would be linked to both the client and matter. Importing of documents is not included in the standard data conversion and a quotation will be provided.

Updates of this Document

This document will be updated as technology changes. If you are updating equipment please check the Infinitylaw Portal for the latest version. As far as possible we maintain compatibility with outdated technology but cannot guarantee that for hardware or software that has been obsolete for more than five years.

Microsoft Software Versions and PC Screen Resolution

We ensure compatibility of Infinitylaw with the Microsoft software below for up to 5 years from the date it was superseded.

Legend:
- ● Needs to be upgraded now (red)
- ● Upgrade as soon as possible (orange)
- ● Current (green)

Server

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Windows 2008	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red
Windows 2012		Green	Green	Green	Green	Green	Green	Green	Green	Green	Orange	Orange	Orange	Orange
Windows 2016						Green	Green	Green	Green	Green	Green	Green	Green	Green
Windows 2019									Green	Green	Green	Green	Green	Green

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
SQL Server 2008	Green	Green	Green	Green	Green	Green	Orange	Orange	Red	Red	Red	Red	Red	Red
SQL Server 2012		Green	Green	Green	Green	Green	Green	Green	Green	Orange	Orange	Orange	Orange	Orange
SQL Server 2014				Green	Green	Green	Green	Green	Green	Orange	Orange	Orange	Orange	Orange
SQL Server 2016						Green	Green	Green	Green	Orange	Orange	Orange	Orange	Orange
SQL Server 2017							Green	Green	Green	Green	Green	Green	Green	Green

Desktop

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	
Windows 8		Green	Green	Green	Green	Green	Green	Green	Orange	Orange	Orange	Orange	Orange	Orange	IDM Document Preview
Windows 10					Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	IDM Document Preview

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	
MS Office 2010	Green	Green	Green	Green	Green	Green	Green	Orange	Orange	Orange	Orange	Orange	Orange	Orange	E-Signature, PDF convert, Email document
MS Office 2013			Green	Green	Green	Green	Green	Green	Orange	Orange	Orange	Orange	Orange	Orange	E-Signature, PDF convert, Email document
MS Office 2016					Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	E-Signature, PDF convert, Email document

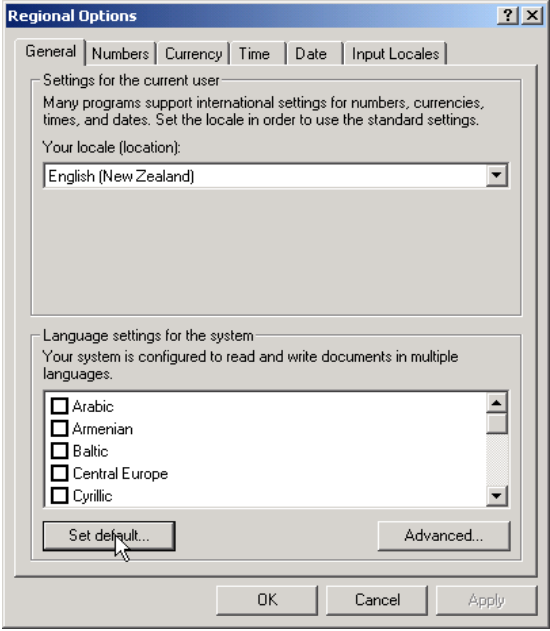| Screen Resolution	Minimum resolution 1920 x 1080 or greater, with 32-bit colour depth required
	Recommended screen size 22" or greater

Windows Server Installation

Time Zones and Regional Settings

Time zones and regional settings must be correct on the server and on PCs **before** SQL Server is installed on the server or Infinitylaw can be installed on either the server or PCs.

WINDOWS SERVER REGIONAL SETTINGS	1. Go into the Regional Settings, General in the control panel.
	2. Click the **Set Default** button down in the lower left corner.
	3. Set to English and appropriate country (ie. NZ or AU)
TIME ZONE:	(Set to appropriate time zone
LOCALES:	▪ Input Locales English(ctry) set as the default English(ctry) ▪ Regional Settings English(ctry) English(ctry) - System Default

NON-UNICODED PROGRAMS	 **Note:** Regional settings window varies between different operating system versions. All the windows within the Regional Settings must be checked and any settings for English (United States) must be changed to English (ctry).
SERVICE PACKS	All of the latest service packs must be installed on the server and PCs for both the operating system and Microsoft products installed. **Note:** Ensuring PC and Servers have the latest patches and service packs is extremely important as it protects the system, saves a wasted support time and disruption for users. Infinitylaw recommends that a person on site is trained in using Windows Update. Infinitylaw support does not cover dealing with problems caused by service packs not being up to date. Any support provided is chargeable. The **Windows Update** web site lists all service packs and critical updates. If extranet is being used report viewer redistribution pack needs to be installed with the latest pack.
WINDOWS UPDATES	Do not set auto Windows updates on the server as this will stop essential processes needed by Infinitylaw.
DOTNET FRAMEWORK	**Server** Install .Net Framework 3.51 and 4.0 **PCs** Install .Net Framework 3.51 and 4.0
INTERNET ACCESS	The server needs to have Internet access so that you can you can access the Internet from the server using Internet Explorer. This is required to enable the server to access Infinitylaw web services. The server also needs to be able to access the Infinitylaw client portal at https://portal.Infinitylegal.net which is used for accessing help from within Infinitylaw and logging support calls.

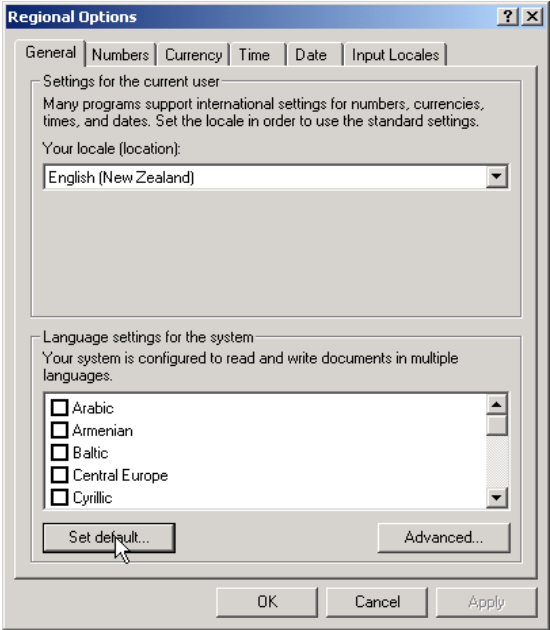|	
INTERNET INFORMATION SERVICES (IIS)	Install IIS along with IIS 6 Management Compatibility with all sub- options ticked on.
OUTLOOK	Within Infinitylaw server applications, there are instances where we send emails to users and Infinitylaw support staff to warn of system issues, Outlook or another MAPI client needs to be configured on the server.
DOMAIN ADMINISTRATION	An Infinitylaw support user with Domain Administrator rights needs to be set-up. This is for Infinitylaw staff to use when providing on-line support.
SERVER BACKUPS	When Infinitylaw is installed the databases will be set to create backup dumps in a set directory e.g. E:\Legal\Dumps. You will be advised what the directory name is and it must be included in the tape backups.
VPN REMOTE ACCESS	A contractual requirement is for remote access to be provided for Infinitylaw remote support. This must be by either a secure VPN or Direct RDP access via a broadband connection. RDP access can be provided on a custom port. This is required before Infinitylaw can be installed. The remote admin terminal sessions must be turned on. Please see page 20 for additional notes on VPN
FIREWALL	The following ports need to be opened on the Firewall between client PCs (or terminal server) and SQL server: • 1433 • 58033 If you have a firewall set with restricted IP addresses, can you please add the following list of IP addresses that can access your system. This is needed to provide Infinitylaw support. • 52.63.66.243 • 13.55.170.70 • 13.210.25.55

SQL Server Installation

Note: Time zones and regional settings on the server must be set as above **before** SQL Server is installed. If they are not SQL Server will have to be re-installed.

SERVER	SQL Server must be installed on the same server as the Infinitylaw database.
DEFAULT INSTANCE	Select the **Default Instance** option when installing SQL Server. *If you don't you will need to re-install SQL Server before Infinitylaw can be installed.* The **Default Instance** name must be **MSSQLSERVER** If it is not e.g. SQLEXPRESS change it to **MSSQLSERVER**
AUTHENTICATION	Server authentication ○ Windows Authentication mode ◉ SQL Server and Windows Authentication mode ▪ Set for SQL Server and Windows Authentification
SQL SERVER COLLATION	Latin1_General_CI_AS **Note:** <u>NOT</u> SQL_Latin1_General_CPI_CI_AS If the Locales are set correctly the Collation should automatically set correctly.
SQL SERVER CLIENT TOOLS	▪ To be installed
FULL TEXT INDEXING	▪ To be installed
SQL REPORTING SERVICES	▪ To be installed

PC Installation

WINDOWS SECURITY	Users require Admin rights with modify rights to C:\Legal and C:\users\(userlogin)\appdata\temp for registry access and Infinitylaw updates. When Infinitylaw updates are installed the installation is done to the server with everyone logged out of Infinitylaw. When each user next opens Infinitylaw it loads the client software downloads from the server and is written into C:\Legal. The temp directory is used by a number of parts of the program for processing data such as converting Word documents to PDFs.
REGIONAL SETTINGS	1. Go into the Regional Settings, General in the control panel. Set for appropriate country. 2. Click the **Set Default** button down in the lower left corner. Set for appropriate country. 3. Set to English (Ctry)
TIME ZONE:	Set to appropriate time zone

LOCALES:	▪ Input Locales English (ctry) set as the default English (ctry) ▪ Regional Settings English(ctry) English(ctry) - System Default **Note:** Regional settings window varies between different operating system versions. All the windows within the Regional Settings must be checked and any settings for English (United States) must be changed to English (New Zealand) or English (Australia) as appropriate.
SERVICE PACKS	All of the latest service packs must be installed on the PCs for both the operating system and Microsoft Office products installed.
DOTNET FRAMEWORK	Install .Net Framework, version as per the Infrastructure requirements starting on page 6 on all PCs. The DotNet framework software is available from Windows Update.
MS OFFICE SECURITY	In Microsoft Outlook, Word and Excel macro security must be set to "Enable all macros" so that the interface to Infinitylaw Document management can run.
TELEPHONE SYSTEM	To use the Infinitylaw Telephone System module for dialling out, incoming caller recognition, and outward call charging the TAPI drivers for the phone system must be installed **on every PC**. A test program is available to check that it is installed correctly and that Infinitylaw can connect to it. A variety of different manufacturers systems are suitable.
MICROSOFT WORD	Word must be able to open a blank page without a macro controlling this. This is to enable IDM (Infinitylaw Document Management) to control the saving of Word documents.

Active Directory

When Infinitylaw is installed it creates an Organisational Unit (OU) in Active Directory called Infinitylaw that contains the following groups:

1. Legal Users – general users of Infinitylaw
2. Legal Accounts – users who will be using the General Ledger
3. Legal Postings – users who will not be using the General Ledger directly but will be running day-ends in the Trust ledger which posts entries to the General Ledger if the General Ledger is interfaced to the Trust Ledger.
4. Legal Admins – users who will be using Infinitylaw parameters

Network users, or groups of users need to be installed in the appropriate groups for them to get access. This is irrespective of what desktop icons are installed on the PC they are using.

Setting up users in Active Directory

All users in the firm must be set up in the appropriate Security Group for their roles.

Within Active Directory an Infinitylaw Organisation Unit has been created that contains security groups to which users in the firm must be assigned.

Security Group	Who needs to be in it	Notes
Legal Users	All Users	It is recommended that the Domain Users security group is set as a member of Legal Users so that everyone can access Infinitylaw without being specifically added to Legal Users.
Legal Accounts	Users who will be working in all or some of: General Ledger, Accounts Payable, Assets Register	Provides access to the General Ledger, Accounts Payable and Assets databases. The software for these applications needs to be installed on the PCs of people in this group.
Legal Postings	Users who run Infinitylaw day-ends	Provides access to the general ledger for posting from Infinitylaw without needing the General Ledger to be installed on the user's PC
Legal Admins	Users designated to control Infinitylaw system settings	Provides access to all systems, including parameters. Changes to Infinitylaw setting can cause serious problems. Few users should have access to this and it is usually limited to one or perhaps two users.

Printer Installation

Printers must first be installed in Windows and then installed within Infinitylaw where specific trays can be set for specific stationery if required.

Infinitylaw certifies all HP laser printers that are up to 5 years old. Most other printers will operate satisfactorily but they are not certified and may cause problems in programs that require precise placement of text and graphics. e.g. statements, bills, online receipts, online cheques.

Printer installation process

1. Install the printers in Windows

    All Windows printers that have multiple trays and that are going to be used from within the Infinitylaw software need to be set-up on the Infinitylaw server. Where the printer has already been set-up on a different server, the printer on the Infinitylaw server need only be set-up as a link to that printer as shared on the other server as would be the case with adding the printer to a normal PC. As a minimum, there must be a default Windows printer set-up on the server.

Note:	The Windows name for each printer **must be identical** on the server and all PCs. The printer drivers must also be the same on the server and the PCs where possible. Where separate drivers need to be used (eg. If the server is 64 bit), care needs to be taken to ensure that the printer tray settings as set on the server align to the correct trays when printed from PCs using alternative drivers. We expect and strongly recommend that the printers on the PCs are created from the share of the printer on the server rather than being set-up manually on the PCs as this ensures that the appropriate Windows name and drivers are automatically brought through. Infinitylaw support does not cover the resolution of problems with the way printers are set up so any support provided with this is chargeable.

    On the Infinitylaw server click on the report monitor. (The printer icon down by the clock). Select the Support Options tab. Double click the Infinitylaw Parameters icon.
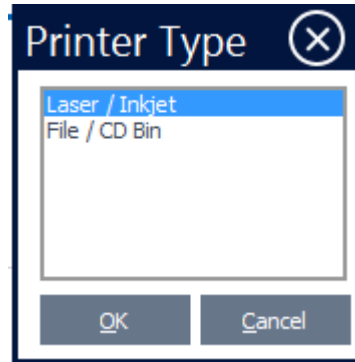
    Now select the Setup menu and then printers.

    The printer window will open
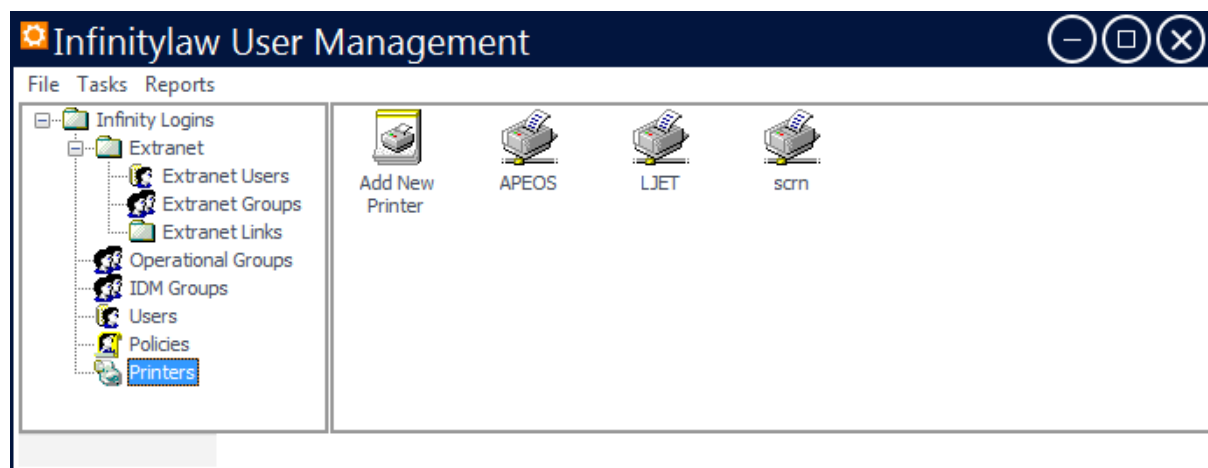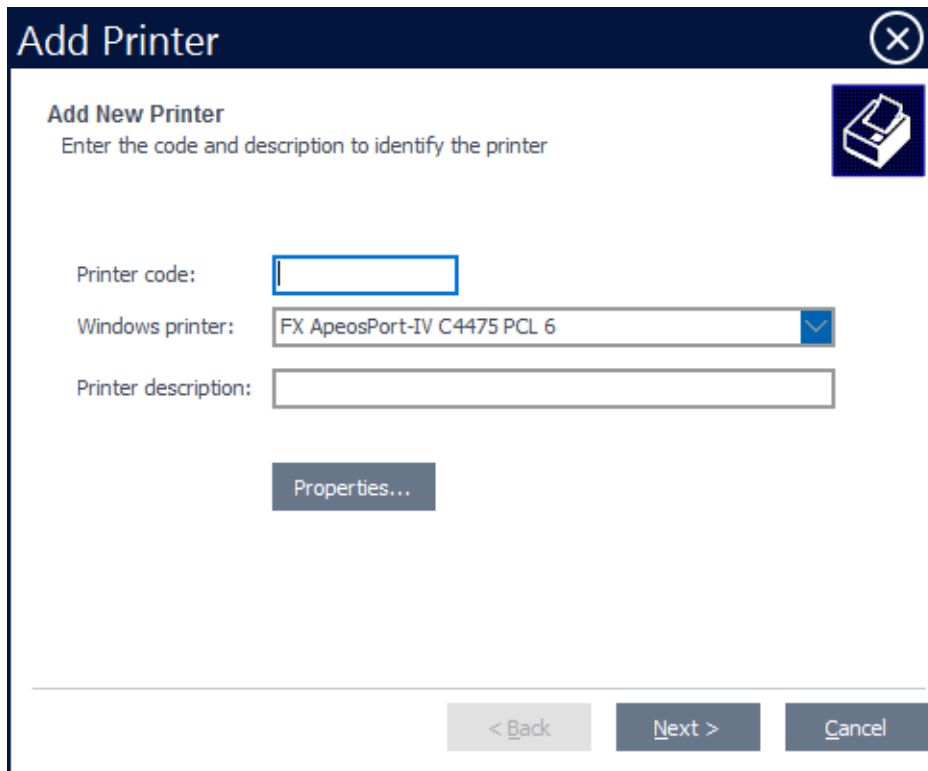

    Double-click on **Add New printer**

2. Select printer type

Select the type of printer and click **OK**.
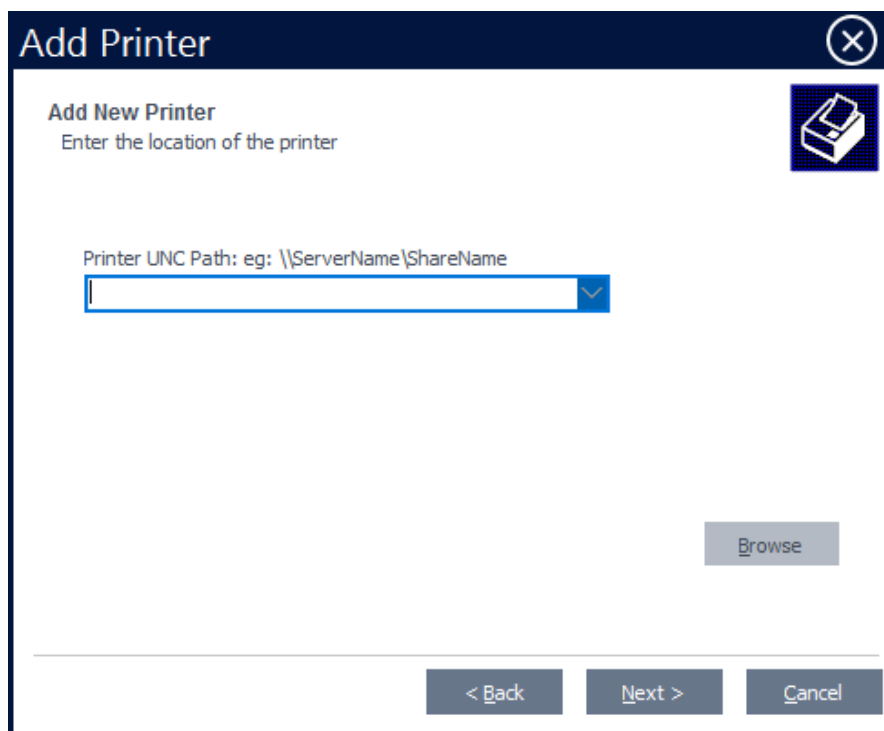
3. Add the new printer details.

The printer code can be up to 8 characters long but must not include any spaces. The printer driver has a pull-down list of the Windows names of the printers set up on the server.

Click **Next**.

4. Enter the location of the printer on the network and the local path to the escape code files.

The location is the UNC path to the printer. The drop-down list gives a list of the locations for Infinitylaw printers already installed. It is not a list of all valid printer shares available. You can use the browse to select the appropriate printer type.

5. Select the trays for each type of paper.

The pull-down list gives the options available from interrogating the printer drivers of the printer selected. Click **Finish**.

6. The new printer will now be included in the list of printers.

Client PC Installation

These notes are provided for adding or re-installing user PCs after the initial Infinitylaw installation.

The client installation software is copied on to the server when the Infinitylaw is installed on the server. It is always accessible and is updated with releases when necessary and can be accessed for re-loading on PCs or when installing new PCs.

Minimum Software Requirements:

See Infrastructure requirements starting on page 6 above.

Microsoft Data Access Components, and ADO Admin are installed by the Infinitylaw PC installation wizard and don't need to be downloaded separately.

Note: **Local administrator rights are required** for users to update new versions of Infinitylaw on the PC, or they must have permission to run the Infinitylaw software in Administrator mode to be able to do updates. This is required to be able to access the Local Machine registry to store installation information.

PC Installation Process

Note: SQL Server port 1433 must be "Allowed" in the firewall before you start installing Infinitylaw on PCs.

1.   Log into the PC with administrator rights.

2.   Go to the run command and type: \\Servername\lginstall$

3.   Right-click on **ilinstall.exe** and select "Run as Administrator"

4.   The ADO Admin install will start and install.

5.   The installation wizard will appear.
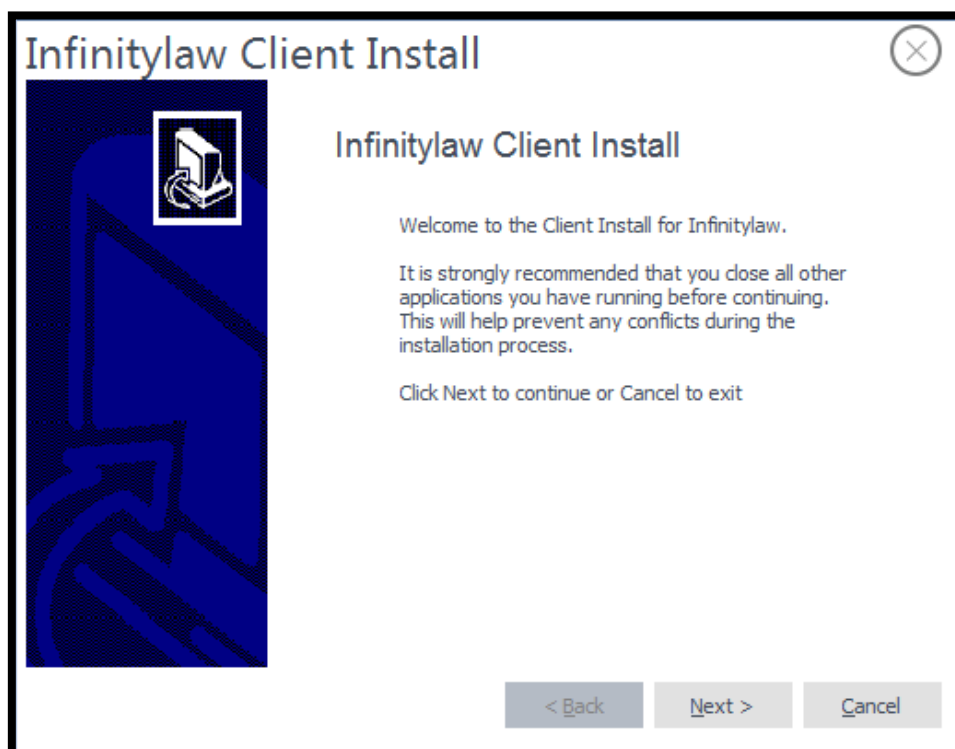
Click N**ext**.

6.   **Server Names**

Infinitylaw Server Name
Type in the name of the Infinitylaw server or click the lookup button to select Infinitylaw Server from the list of computers in the domain.

SQL Server Name
This will default to the Infinitylaw server name.

Click **Next**.

7.   **Client Install Options**

a. **Install Options**

Select the options required. It is important that the firm's system supervisor advises on what is to be installed. The accounting packages will be installed on a small number of PCs

Infinitylaw	Always select if a new installation but not if Infinitylaw is already installed and you are just adding modules
Advanced	Use only if advised by Infinitylaw Support
Accounting Packages	Select the Office Accounting modules required by the user of this PC
Training	Select if the user of this PC is to have access to the Infinitylaw Training database
Document Management *(IDM- Infinitylaw Document Management)*	• For a new Infinitylaw installation DO NOT select this unless instructed by Infinitylaw. It will be automatically set for all users when IDM conversion has been completed. • For firms who have been using Infinitylaw for a period select this option. • If instead of "Document Management" the options "Document Linking" and "Outlook linking" appear the firm is using an older version. If the firm is using Softeryx to store documents select only the outlook linking option. If in doubt check other PCs on the network or talk to the firm's system supervisor who can log a support call for help if required. • Macro settings in Word, Outlook and Excel MUST be set to "Enable all macros"

b. **Database Authentication**

In line with Microsoft we recommend that Windows Authentication is selected. This is faster and easier for users but does mean that they should have a proper Windows password for their PC. If SQL authentication is selected the user will have to log on to SQL Server every time they open Infinitylaw.

c. Click *Install*.

The wizard will check the Microsoft Data Access Components and if they require updating it will run Microsoft's Install and exit the install as this needs to be properly installed first. After that has installed reboot, even it does not prompt you to do so and re-run the setup going through the last seven steps to this point again.

8. **Check that dates are showing in the correct format**

Ask the PC user to go into Infinitylaw Client Information and open a matter. Check the dates are formatted dd/mm/yy.

e.g.   ● Trust transactions: 166   Last date: 23/08/2018

If they are in US format you will need to change the PCs time zone to say Singapore and then reboot. Once it is re-booted change the time zone to NZ or AU as appropriate and it should now stay that way.

The PC now has Infinitylaw installed. Which parts of Infinitylaw each user can access is managed by the security and configuration settings in Infinitylaw. If the user needs changes they will need to talk to the system administrator.

Installing IDM (Infinitylaw Document Management) on a PC

If Infinitylaw is already installed on a PC and later on you only want to install the IDM interface you can run the install program directly from the PC: \\servername\lginstall$\DMSSetup.exe

iAuthor Installation & Setup

iAuthor is a time recording app for iPhones, iPod Touches, Android phones and devices. It enables time recording while outside the office and has a sync feature to send the time records to Infinitylaw and also to pick up the author's latest list of active matters and the firms work activity codes.
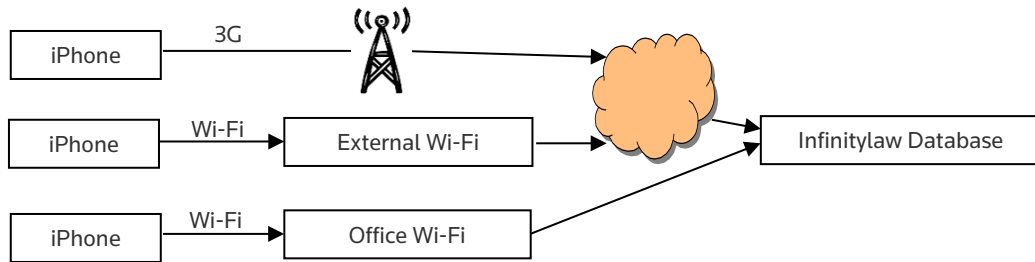
Please refer to the Infinitylaw Portal > Help > Technical Documents for the Installation Guide

Please refer to the Infinitylaw Portal > Help > User Guides for User Information

Extranet Installation & Setup

The Extranet is aimed primarily at users of Infinitylaw because it can use the Infinitylaw database but it is a web development which could potentially be used by firms with different legal systems.

The Extranet web service needs to be installed on a dedicated internet-facing webserver that is not in the domain, but can reach the Infinitylaw server via dedicated ports through a firewall. An installation program is available for this.

The Document Service will be installed on the Infinitylaw Server.

Due to the potential security risks, the Extranet web service should never be installed on the Infinitylaw Server.

A ticket will need to be logged to complete the installation so a password can be provided to complete the installation. There is an cost to install the Extranet and a quote will be provided when the ticket is logged.

Please refer to the Infinitylaw Portal > Help > Technical Documents for the Installation Guide

Please refer to the Infinitylaw Portal > Help > User Guides for User Information

Extranet Installation & Setup

Infinitylaw configuration notes

These notes are provided as a guide on how Infinitylaw is installed on the server. The drive letters are the ones typically used but may vary according to the actual disk configuration.

Software location

If there are separate drives for the system drive, logs and data, the expected directories would be like the list below, depending on the drive letters you use.

Note: The directories starting with \legal will be automatically created by the Infinitylaw installation.

C:	System software	
E:	\legal\Logs	Database logs
	\legal\Dumps	Database dumps (Dumps are set to run automatically)
F:	\Legal	Infinitylaw software
	\MSSQL\data	Databases
	\WPdata	Document files if stored on this server
	\Library	Brookers, CCH etc if stored on this server

Shares

When Infinitylaw is installed the following shares are created:

Share	Folder	Description
Lginstall$	F:\legal\install	Contains our install programs. Ilinstall.exe, ADOSetup.exe
Lgparams$	F:\legal\params	Infinitylaw parameters (mntpmt32.exe)
Lgreports$	F:\legal\reports	Printer spooling directory and stores dayends and online bills.
Lgclient$	F:\legal\client	Contains Infinitylaw client software

Infinitylaw will not operate correctly if any of these shares are removed or changed. These are hidden shares to avoid clutter in browser lists and to avoid operators accessing some parts of the Infinitylaw configuration.

- Do not open up other shares to access Infinitylaw files as they may allow unauthorised access to the configuration and possible corruption.

- Do not move files from these folders

- Do not remove or rename any of these shares

Anti Virus Software

Cyber threats are a reality and Anti-virus software are now installed and configured much more stringently. These strict policies may mistakenly identify Infinitylaw components as 'Suspect'. As a pro-active measure, we strongly recommend the following activities be completed by your IT department or supplier. Due to the anti-virus software variations available, the sections below are generic in nature.

Whitelisting/Exclusions/Safelisting

Antivirus software should be configured to regard all Infinitylaw components as safe. This activity can be done on a folder level (i.e. "c:\legal"), it may be necessary to add/whitelist each component individually.

Behavior Monitoring

Some anti-virus software packages monitor the behavior of software programs. It may be necessary to add Infinitylaw components "c:\legal" into the "Certified Safe Software Service" category or the equivalent for your anti-virus software.

It is likely that the above two categories of anti-virus software configuration must be done on the anti-virus server level too, as these servers propagate this configuration down to the individual client machines anti-virus software.

Notes on VPN

From **1 August 2018** we no longer support the use of PPTP VPN connections when remotely connecting to client servers. PPTP is an old VPN protocol that has been abandoned globally as it is no longer secure, so we are taking this action to help protect you as our client and also to protect our Support systems.

There are various brands of proprietary software that can be used to provide a secure VPN connection. The most common are IP-Sec, SSTP and direct Remote Desktop. We also allow the use of dedicated VPN products like Forticlient, Sonicwall NetExtender, Cisco AnyConnect, OpenVPN and others for providing remote access to their servers.

If your chosen VPN solution will not work alongside the VPN solution of another client, we will discuss this with you. You may be asked to change your solution depending on the outcome of that discussion.

Team Viewer

Team Viewer is NOT an acceptable method of providing access for support. The only time this is acceptable is as an interim method of providing access prior to the Infinitylaw installation to allow us access to investigate the existing data for conversion.

Web-based Access

There are a number of web-based options to provide initial connections to user sites. These must be followed by the ability to launch Terminal Server access to the system, either from the web-based software or from our desktop.

Checklist

The following checklist is provided as a way of ensuring that all requirements for Infinitylaw as covered in this document have been covered.

Server Details		OK
Server name:		
Remote connection:	Secure connection	
Remote support:	RDP (Remote desktop)	
System Settings		
User regional settings – **English(NZ), English(AU)**	Required	
System default regional settings – **English(NZ), English (AU)**	Required	
System Locale(Default) **English(NZ), English(AU)**	Required	
MS SQL Server		
Installed as default instance	Required	
SQL Server collation **Latin1_General_CI_AS** Note: **NOT** SQL_Latin1_General_CPI_CI_AS	Required	
Authentication set to Windows and SQL Server	Required	
SQL Full Text indexing installed	Required	
SQL Reporting Services installed	Required	
SQL Server Client tools installed	Required	
Service packs		
Applied latest Windows service packs	Required	
Applied latest SQL service packs	Required	
Applied all critical updates from Windows Update	Required	
Report viewer redistribution pack with service pack 1 **(extranet requirement only)**	Required	
Installed .net framework versions as required on server and PCs	Required	
Printers		
Printer names and drivers the same on PCs and the server	Required	
Internet access		
Outlook or another MAPI client configured on the server	Required	
Internet explorer is configured on the server for outbound internet access	Required	
Domain Administrator		
A Domain administrator 'Infinitylaw' has been set up	Required	
Users have been assigned to the appropriate Active Directories for their roles	Required	

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