Case Notebook iCommand Installation and Quick Reference Guide (iManage DeskSite and iManage FileSite)

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

For free reference materials, visit <u>http://legalsolutions.thomsonreuters.com/law-products/support/user-guides</u>.

Our products also contain comprehensive, searchable instruction available via the **Help** menu in the application.

Case Notebook iCommand allows you to send documents, pleadings, and research documents to Case Notebook using iManage DeskSite or iManage FileSite. To install Case Notebook iCommand, you must have the following:

- Case Notebook installed on your computer.
- User rights in Autonomy (iManage) WorkSite.
- Local administrator privileges for the desktop.

iManage DeskSite

Installing Case Notebook iCommand

To install Case Notebook iCommand, complete these steps:

- 1. Go to <u>http://info.legalsolutions.thomsonreuters.com/software/iCommand/default.aspx</u>. The Case Notebook iCommand Download page is displayed.
- 2. Click Proceed with Download.
- 3. Click Next. The License Agreement dialog box is displayed (Figure 1.

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|---|--|--------------------------------|--|--|--|--|
| License Agreemen | t | | | | | |
| Please take a moment to read the Agree", then "Next". Otherwise | he license agreement now. If you ac click "Cancel". | cept the terms below, click "I | | | | |
| | lote Case Notebook i ubscriber Agreeme | | | | | |
| Your ability to download and use West LiveNote Case Notebook iCommand Software ("Software") is subject to the terms and conditions of the agreement below ("Agreement"), a legal document between you (the "Subscriber") and West, a Thomson Reuters business ("West"), West, as used herein, means West Publishing Corporation, Thomson Reuters Applications, Inc., West Services, Inc, Thomson Reuters (Legal) Inc., and | | | | | | |
| I Do Not Agree | C I Agree | | | | | |
| | Cancel | < Back Next> | | | | |

Figure 1. License Agreement dialog box

4. Scroll to the bottom of the license agreement as you read it, then click **I Agree and click Next**. The **Select Installation Folder** dialog box is displayed (Figure 2).

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|---|---|-------------------------|
| Select Installation Fold | er | |
| The installer will install West LiveNote C | Case Notebook iCommand to the fo | llowing folder. |
| To install in this folder, click "Next". To | install to a different folder, enter it b | elow or click "Browse". |
| Eolder: | na Mataka ak (Cananan A | Browse |
| C:\Program Files\West LiveNote\Ca | ase Notebook (Command) | Browse |
| | | Disk Cost |
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| Everyone | | |
| C Just me | | |
| | | |
| | Cancel < Bac | k Next> |

Figure 2. Select Installation Folder dialog box

5. Click **Next**. The **Confirm Installation** dialog box is displayed (Figure 3).

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|---|------------------|----------------------|-----------|
| Confirm Installation | | | |
| The installer is ready to install West Live | Note Case Notebo | ook iCommand on your | computer. |
| Click "Next" to start the installation. | | | |
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| | Cancel | < Back | Next> |

Figure 3. Confirm Installation dialog box

6. Click Next. The Installation Complete dialog box is displayed (Figure 4).

| 🙀 West LiveNote Case Notebook iCo | mmand | _ 🗆 X |
|---|------------------------------------|-------|
| Installation Complete | | |
| West LiveNote Case Notebook iComman Click "Close" to exit. | d has been successfully installed. | |
| | Cancel < Back | Close |

Figure 4. Installation Complete dialog box

7. Click Close.

Using Case Notebook iCommand in iManage DeskSite

To send a document, pleading, or research document from iManage DeskSite to Case Notebook, complete these steps:

- 1. Access iManage DeskSite.
- 2. Right-click the document, pleading, or research document you want to send to Case Notebook and click Send to Case Notebook as Document, Send to Case Notebook as Pleading, or Send to Case Notebook as Research on the menu (Figure 5).

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| ů sa 8 | Profile Field | Send to Case Notebook as Research | Ctrl+R | | | | | SS EG-ELTVMDV-B10 | (Online) |

Figure 5. DeskSite window

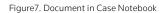
Alternatively, on the Documentation menu, you can click Send to Case Notebook as Document, Send to Case Notebook as Pleading, or Send to Case Notebook as Research. The Data Import Wizard–Load Files dialog box is displayed (Figure 6).

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Figure 6. Data Import Wizard-Load Files dialog box

3. Click Finish. Case Notebook opens with the document, pleading, or research document listed under Documents, Pleadings, or Research in the left pane and the text of the document, pleading, or research document displayed in the right pane (Figure 7).

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Performing a Silent Installation

It is recommended that an experienced information technology specialist execute a silent installation. To run a silent installation, type the following command at a command prompt:

msiexec.exe /i C:\folderpath\cnbicommand_setup.msi /qn where C:\folderpath\ is the drive and folder location of the MicroSoft Installer (MSI) file.

PERFORMING A SILENT UNINSTALLATION

To run the silent uninstallation for Send to Westlaw Case Notebook iCommand, type the following command at a command prompt:

MsiExec.exe /x{700DD8A0-AED8-4C24-8250-163CD08C212E} /qn

iManage FileSite

Installing Case Notebook iCommand

To install Case Notebook iCommand, complete these steps:

- 1. Go to http://info.legalsolutions.thomsonreuters.com/software/iCommand/default.aspx. The Case Notebook iCommand Download page is displayed.
- 2. Click Proceed with Download.
- 3. Open the CNBiCommand_Setup.zip file and double-click setup.exe. The iCommand Setup Wizard dialog box is displayed (Figure 8).



Figure 8. iCommand Setup Wizard dialog box

4. Click Next. The License Agreement dialog box is displayed (Figure 9).



Figure 9. License Agreement dialog box

5. Scroll to the bottom of the license agreement as you read it, then click **I Agree and click Next**. The **Select Installation Folder** dialog box is displayed (Figure 10).

| 🛃 West LiveNote Case Notebook iCo | ommand | | |
|--|--------------------------|--------------------|------------------------|
| Select Installation Folde | er | | |
| The installer will install West LiveNote Ca | ise Notebook iComm | hand to the follo | wing folder. |
| To install in this folder, click "Next". To in | nstall to a different fo | lder, enter it bel | low or click "Browse". |
| Eolder: C:\Program Files\West LiveNote\Cas | e Notebook iComma | and\ | Browse Disk Cost |
| Install West LiveNote Case Notebook computer: | iCommand for yours | elf, or for anyon | e who uses this |
| Everyone | | | |
| C Just me | | | |
| | Cancel | < Back | Next > |

Figure 10. Select Installation Folder dialog box

6. Click Next. The Confirm Installation dialog box is displayed (Figure 11).

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|--|-------------------|------------------------------|-------|
| Confirm Installation | | | |
| The installer is ready to install West Liver | Note Case Noteboo | k iCommand on your computer. | |
| Click "Next" to start the installation. | | | |
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| | Cancel | < Back Ne | ext > |

Figure 11. Confirm Installation dialog box

7. Click Next. The Installation Complete dialog box is displayed (Figure 12).

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Figure 12. Installation Complete dialog box

8. Click Close.

Using Case Notebook iCommand in iManage FileSite

To send a document, pleading, or research document from iManage FileSite to Case Notebook, complete these steps:

- 1. Access Microsoft Outlook.
- 2. Right-click the document, pleading, or research document you want to send to Case Notebook and click Send to Case Notebook as Document, Send to Case Notebook as Pleading, or Send to Case Notebook as Research on the menu (Figure 13).

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| Tasks | | Send to Case Notebook as Document Send to Case Notebook as Pleading Send to Case Notebook as Research Applications | | | |
| 11 Items | | Remove Relation | | | |

Figure 13. Microsoft Outlook

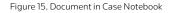
If you choose to send as a document or pleading, the **Data Import Wizard–Load Files** dialog box is displayed. If you choose to send as research, the **Data Import Wizard–Research Properties** dialog box is displayed (Figure 14).

| Data Import W | Wizard | × |
|-----------------------|--------------------------------|--------|
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Figure 14. Data Import Wizard-Research Properties dialog box

3. Click **Finish**. Case Notebook opens with the document, pleading, or research document listed under Documents, Pleadings, or Research in the left pane and the text of the document, pleading, or research document displayed in the right pane (Figure 15).

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MsiExec.exe /x{700DD8A0-AED8-4C24-8250-163CD08C212E} /qn

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