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Overview

This document is intended to provide general technical information and guidelines related to the installation of the CaseManagerPro software on servers owned, managed or otherwise operated by or for licensee entities. The software is developed, owned and licensed by Lucid IQ, which offers the software as a service (SaaS) as well as for on-site installation.

Additional information about the CaseManagerPro software, installation, SaaS, and technical support is available upon request.

The Software

CaseManagerPro is a multi-tier legal case management system that is installed and operates on host web and database servers via common browser technology. The interface operates effectively through all major brands of browsers; though, Internet Explorer is recommended as it is the standard applied for development and testing. Recommended browser settings are available from our helpdesk.

CaseManagerPro has an ActiveX/COM component that users can easily download from the server. This component provides additional document management and assembly features for Windows' OS only.

There is also an optional OEM document viewer and editor. This HTML5 product is server-based and, through the CaseManagerPro integration, provides for viewing, annotation and redaction of rendered documents via a variety of devices and browser products.

Installation

CaseManagerPro has an executable installer that automates the installation process for most standard configurations. Lucid IQ provides recommended server settings as well as other instructions and support to address any issues encountered and specialized installations as may be required. The Lucid IQ technology team has installed and supported installations of the program in a broad variety of complex and unique scenarios with a 100% success record.

Client-side support is rarely required except for users that need assistance managing browser updates and settings.

Server Requirements

CaseManagerPro can be installed in either a single-server or a dual-server setup. In the single-server setup, a single server functions as both the web and database server. In a dual-server setup, one server functions as the web server and another server functions as the database server. An additional file server may be employed to host document files outside of the database in certain situations, but is generally not required. Consult our technology team if you have any question about managing your documents.

Software and Configuration

CaseManagerPro requires a web server and database server that may be one physical unit. Windows Server 2003 or 2008-R2 OS is required for both. SQL-Server 2005 (Workgroup or better) or 2008-R2 is required for the database server.

A web server static IP address should be installed but undesignated in IIS, though it may have a network name (i.e. WINS, DNS). Internal and external users should use the same method of accessing the server.

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Server Specifications

A dedicated server is recommended for CaseManagerPro to minimize the potential for conflicting application requirements and competing demand for server resources.

Base Server Requirements	Recommended Specifications:	Minimum Specifications:
Processor	Quad Core 2.0Ghz processor	Dual Core 1.5Ghz processor
Memory	8GB RAM or better	4GB RAM or better
Hard Drive	Raid 1 or 5 storage partition 200GB minimum	Raid 1 storage partition 30GB minimum
Software	Windows Server 2008 R2 SQL Server 2008 R2 Internet Explorer v8.0 or better	Windows Server 2003 SQL Server 2005 Internet Explorer v8.0 or better
Networking	Network Interface Card (NIC) & connection	Network Interface Card (NIC) & connection
Additional Hardware	Database and Web Server Backup System	Database Server Backup System

These specifications are based on low to moderate demand installations. To assure server adequacy, review the anticipated requirements with our Lucid IQ technology team.

Please contact us with any questions to address your specific needs.

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