

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-premises installation.

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

The Software

CaseManagerPro is a web-based application that is a multi-tier legal case management system. Its core is hosted on a web server and database server, and the application is accessible to the users via a web browser. Microsoft Internet Explorer 11 is recommended as it is the standard applied for development and testing, and it fully supports the security configurations that allow users to utilize the extended functionality of CaseManagerPro.

CaseManagerPro provides optional ActiveX/COM components that users can easily download from the server and install on their machines. Internet Explorer security configurations ensure Active/COM components are restricted to only approved domains – including the CaseManagerPro site. These components provide additional document management and assembly features as well as integrations within various applications and the file system for users running Windows.

There is also an optional OEM document viewer and editor. This HTML5 product is server-based and provides client-side viewing, annotation and redaction of rendered documents.

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 specialized installation requirements. The Lucid IQ technology team has installed and supported installations of CaseManagerPro in a wide variety of complex and unique environments with a 100% success record.

CaseManagerPro can be installed in either a single-server or a dual-server setup. In the single-server setup, one server functions as both the web and database server. For a dual-server setup, one server functions as the web server and the second 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.

Server Requirements

CaseManagerPro requires a web server and database server that may reside in one physical unit. Windows Server (2008-R2 or higher) 64-bit OS is required for both. SQL Server 2008 or higher (Workgroup or better) is required for the database server.

A network user account is required that is an administrator on both the web server and the database server. This network user must have a SQL Server Login that utilizes Windows Authentication and has the role “sysadmin.”

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 exact same URL when accessing the CMP site.

Further server pre-requisites/configurations based on your specific environment will be provided prior to installation.

Server Specifications

Dedicated servers are recommended to host CaseManagerPro in order to minimize the potential for conflicting application requirements and competing demand for server resources. Ideally, the web server should not host additional IIS Sites and the database server should not host additional SQL Server databases.

The following recommendations are for low to moderate demand uses of CaseManagerPro.

| Base Server Requirements | Recommended Specifications: | Minimum Recommended Specifications: |
|---------------------------------|---------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| Processor | Quad Core 2.0Ghz processor | Dual Core 1.5Ghz processor |
| Memory | 16GB RAM or better | 4GB RAM or better |
| Hard Drive * | Raid 1 or 5 storage partition 200GB minimum | Raid 1 storage partition 50GB minimum |
| Software ** | Windows Server 2008 R2+ SQL Server 2008 R2+ Microsoft .NET 2.0 & .NET 4.0 | Windows Server 2008 R2 SQL Server 2008 R2 Microsoft .NET 2.0 & .NET 4.0 |
| Additional Hardware | Database and Web Server Backup System | Database Server Backup System |

* Hard Drive size and speed requirements are dependent on number of users and data storage needs (data, documents, etc...)

** SQL Server 2005 is currently supported, but support may be withdrawn at any time.

CaseManagerPro does support installation on Virtual Machines. If you are running virtualized servers, please contact Lucid IQ to ensure they are compatible with CaseManagerPro.

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.

cmpsupport@lucidiq.com

214-221-9995 x3