

LexisNexis® Total Search v. 3.2

Installation Guide



LexisNexis®

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Server Installation

General

The information detailed in this chapter provides the user with the procedures needed to install the LexisNexis® Total Search Server. The role of the server is to manage the major functions of the LexisNexis Total Search product to include:

- handling all search requests against Internal Document Repository (IDR) documents
- retrieving Shepard's® signals
- formatting IDR documents for display
- citation recognition for population of the citation index

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Before Installing LexisNexis Total Search

Review the following requirements and recommendations before you install the LexisNexis Total Search server.

- You must create an administrator-level user account to run the LexisNexis Total Search server. Instructions for creating such an account are provided later in this chapter.
- In addition to the hard drive space the LexisNexis Total Search server occupies directly, you should allocate an extra amount of hard drive space equal to approximately 2.5 times the amount of space needed to store all the documents you plan to include in the Total Search index.
- Install the LexisNexis Total Search server on a different host system than your Document Management System (such as iManage or DOCS Open). When LexisNexis Total Search runs on its own host, it can index documents continuously throughout the day without impacting the performance of your DMS server.
- LexisNexis Total Search Server V3.2 does not coexist with earlier Total Search versions on the same host system. It is advisable to install and configure V3.2 on a new host and verify that the new installation is working properly before you uninstall your previous version of LexisNexis Total Search on the original host.
- After installing the LexisNexis Total Search server, you can check to see if the server is up and running by pointing a Web browser to the following location:

`http://tsServer:16000/admin/logs`

...where `userid` is `tsadmin`, the password is `total!search` (case sensitive), and `tsServer` is the LexisNexis Total Search server host system. Check the log for recent errors to see if the server is operating properly.

Creating a User to Run the LexisNexis Total Search Server

Before installing the LexisNexis Total Search server, create a user account with administrator rights that will be used to run the server. It is preferable to run the application as a local user instead of a domain user.

To Create a New User Account

- 1 From your desktop, right-click on **My Computer**. Click **Manage**. The Computer Management screen opens.

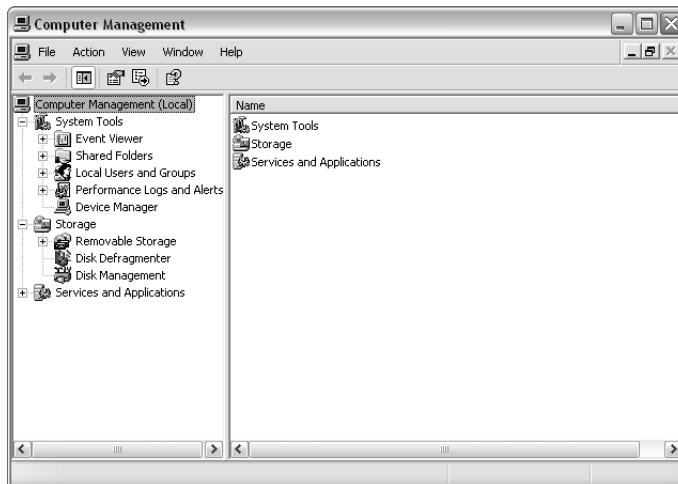


Figure 1.1 Computer Management Screen

- 2 Click **Local Users and Groups**.

3 Click **Users**. The Users file structure window is displayed.

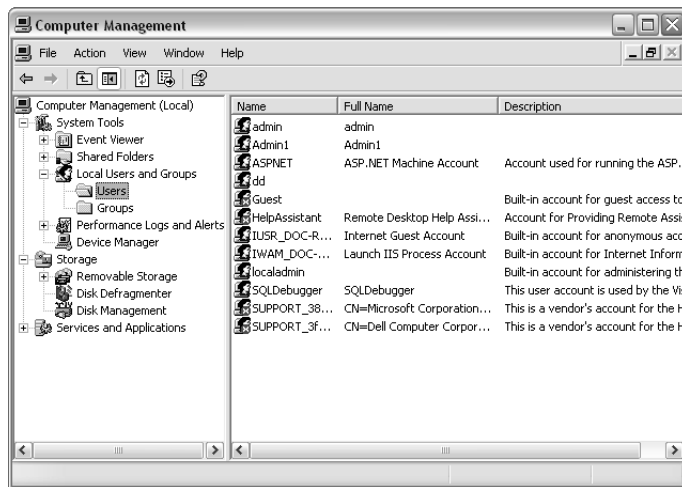


Figure 1.2 Users File Structure Screen

4 Right-click inside the Users File Structure panel. The list of available options opens.

5 From the list, choose **New User**. The New User screen opens.

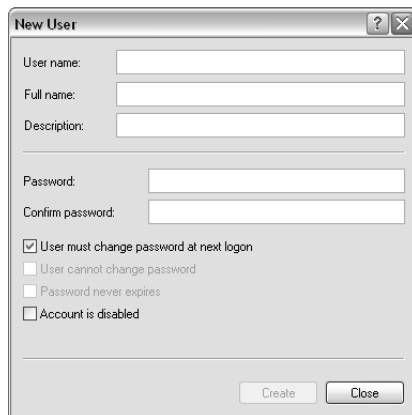


Figure 1.3 New User Screen

6 Enter a User Name (*TSUser1* is used for this example) and password.

7 Clear (uncheck) the "User must change password at next logon" field.

- 8 Check (select) **Password never expires**.
- 9 Click **Create**. A new "New User" screen opens.
- 10 Click **Close**. The Users file structure window is displayed.
- 11 Right-click on the new user account just created (i.e. TSUser1). Click **Properties**. The TSUser1 Properties screen opens.

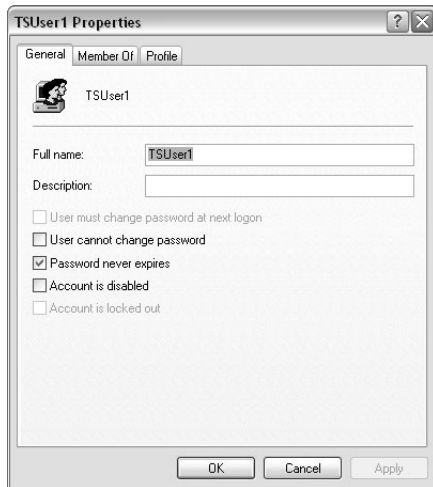


Figure 1.4 New User Properties Screen

- 12 Click the **Member Of** tab.
- 13 Click **Add**. The Select Group screen opens.
- 14 In the text box, type **Administrators**. Click the **Check Names** button.
- 15 Click **OK**. A new User Properties screen opens.



Figure 1.5 New User Properties Screen

16 Click **OK**.

You have finished creating a user account to run the LexisNexis Total Search server. The next step is to install the server.

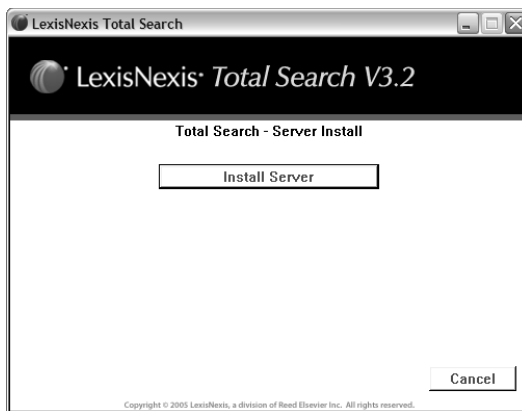
Installing the LexisNexis Total Search Server

Use the *LexisNexis Total Search - Server Install CD* to install the LexisNexis Total Search Server.

To Install the LexisNexis Total Search Server

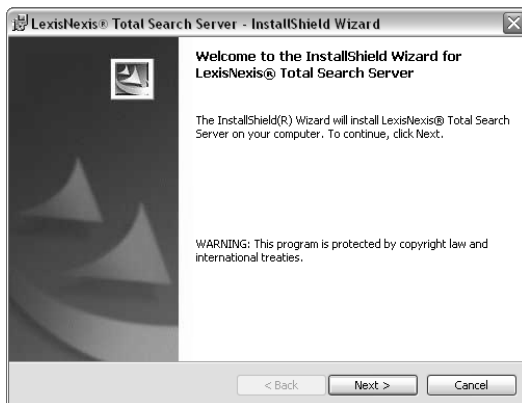
- 1 Insert the LexisNexis Total Search - Server Install CD in your CD drive.

The LexisNexis Total Search Server Install screen opens. (If autorun is not enabled on your system, run `tsauto.exe` on the CD root directory.)

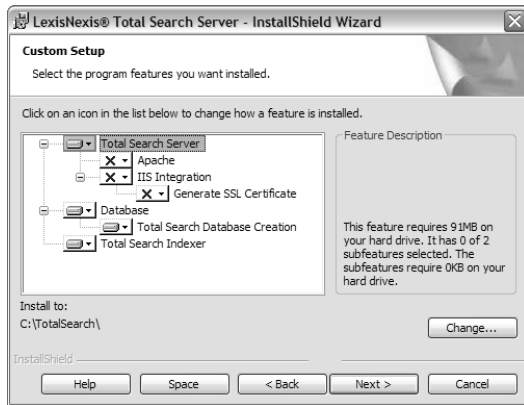


- 2 Click **Install Server**. The LexisNexis Total Search Server InstallShield® Wizard opens.

Note: If CFE and the Total Search Database engine is not yet installed, you will be prompted here.



- 3 Click **Next**. The Custom Setup screen opens.



- 4 Click on a drop-down menu icon (**Total Search Server** and/or **Database**) to change how a feature is installed. In this example, the Total Search Server drop-down menu is selected. Click **Next**.

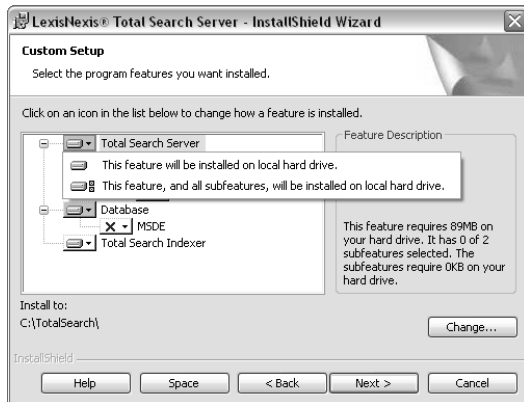


Figure 1.6 LexisNexis Total Search Server Custom Setup Drop-Down Screen

- 5 From the Logon Information screen, enter the User name and password of the user account created prior to beginning the Install Server procedure. This user account must have administrator rights.

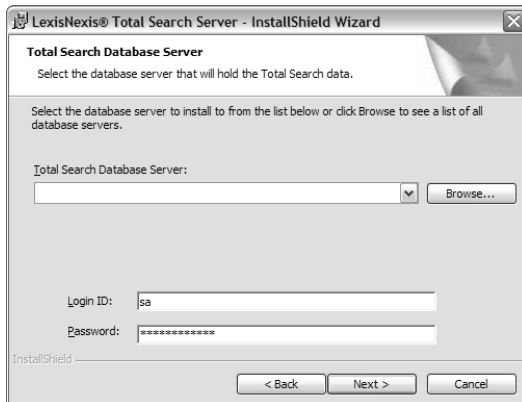
- or -

Click **Browse** to select a Domain/Server and a User name. Select **OK** to continue.

Note: The user account must be in the form of Domain\Username (i.e. xxxxxxxx\TSUser1), where xxxxxxxx equals the Domain or server name, and TSUser1 equals the user name created.



- 6** From the Logon Information screen, Click **Next**. The Total Search Database Server screen which is an optional screen opens based on whether the Total Search Database engine was installed or not.



Note: The information for the figure above applies to the Total Search Database Server and not the DMS Database Server.

- 7** Select the Database Server (use the **Browse** button if necessary). Click **Next**.
- 8** The LexisNexis Total Search Parameters screen opens with pre-filled information, where:

Firm Name is what appears in the link for Search My Documents

Fully Qualified Domain Name identifies the server program that a request is addressed to.

Instream Server is the server name in which the FAST Server will be installed.

Instream License is the License file required to install the FAST Server.

Total Search License is the License file required to install the Total Search server.

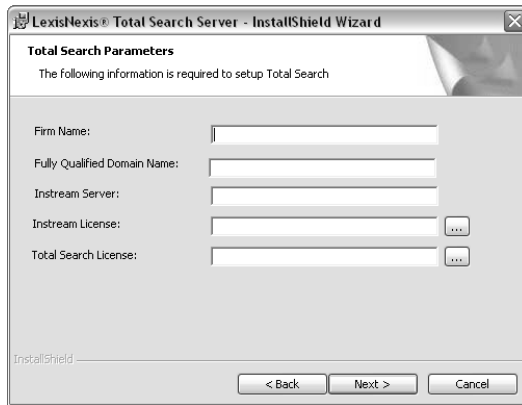



Figure 1.7 LexisNexis Total Search Parameters Screen

9 Enter a Firm Name. Change the *Instream License* or *Total Search License* fields using the  "Lookup button" as required.

10 Click **Next**. The Ready to Install Program screen opens.



Figure 1.8 LexisNexis Total Search Ready to Install the Program Screen

11 Click **Install**. The LexisNexis Total Search Server screen opens.

12 Server Installation



Figure 1.9 LexisNexis Total Search Server Install Screen



If you have selected Apache as your Web server, you may see the error message “**Error 27500. This setup requires Internet Information Server 4.0 or higher for configuring IIS Virtual Roots. Please make sure that you have IIS 4.0 or higher.**” This error message can be safely ignored.

12 Click **Finish**. The LexisNexis Total Search Server Installer Information screen opens.

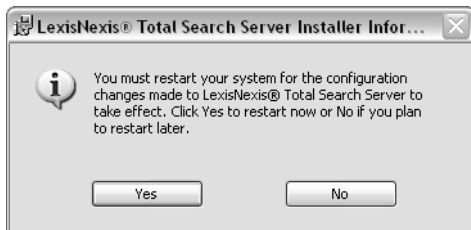


Figure 1.10 LexisNexis Total Search Server Installer Information Screen

13 Click **Yes** to restart the host system. Although you have the option to restart the system manually later, it is best to restart now, before performing any post-installation configuration.

14 It is required to set Virus Scanning Exclusions for the C(D):\TotalSearch and C(D):TsindeXer folders and subfolders. Coordinate with the appropriate IT persons to exclude these folders.

Note: Do not start fabricating and indexing documents until Virus Scanning is addressed.

Connector Installation

General

The information detailed in this chapter provides the user with the procedures needed to install the iManage[®], DOCS Open[®], DM, WORLDOX and the File System Connectors used with LexisNexis Total Search. The Connectors are used to retrieve document information for inclusion in the IDR. They retrieve documents, metadata, and security information from the DMS Database or File System.

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Understanding Connectors

LexisNexis Total Search uses connectors to read the databases of different Document Management Systems (such as iManage or DOCS Open). A connector is usually installed on the same host system with the LexisNexis Total Search server, but it can also run on a separate system.

There are two steps to creating a connector:

- The first step is to complete one of the installation procedures in this chapter, which gives you a connector manager of the appropriate type for your DMS.
- The second step is to use the connector manager to create and configure a connector to read your DMS database.

Instructions for using connector managers to create and configure connectors are available in the *LexisNexis Total Search Administrator Guide*.

After you create a connector, it runs as a service and checks at ten-minute intervals throughout the day to see whether you have scheduled a fabrication. When there is a scheduled fabrication, the connector reads the DMS database and retrieves documents that meet the filter criteria, adding those documents to its collection. LexisNexis Total Search maintains a document collection for each of its connectors and makes them all available for searching.

Each connector has its own set of filters, schedules and other configuration settings. If you delete a connector, you lose its filters, schedules and settings, but you also lose the connector's document collection. More information on connectors, filters, schedules and the fabrication process is available in the *LexisNexis Total Search Administrator Guide*.

Installing iManage Connectors

Use the *LexisNexis Total Search - Tools and Connectors Install CD* to install Total Search Connectors.

To Install the iManage Connector Manager

- 1 Insert the LexisNexis Total Search - Tools and Connectors Install CD in your CD drive.

The LexisNexis Total Search Install screen opens. (If autorun is not enabled on your system, run `tsauto.exe` on the CD root directory.)

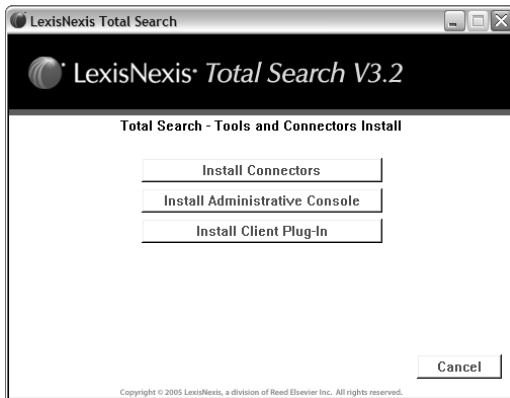


Figure 2.1 LexisNexis Total Search Install Screen

- 2 Click **Install Connectors**. The Connectors screen (shown below) opens.

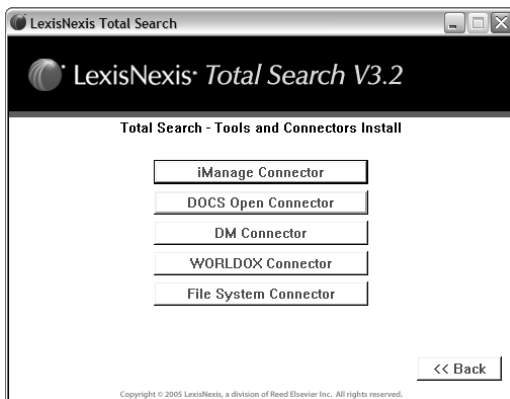


Figure 2.2 LexisNexis Total Search Connectors Screen

3 Click **iManage Connector**.

The installer detects whether Microsoft® Visual J#® .NET is installed on your system. If it is already installed, the iManage Connector InstallShield Wizard appears. Proceed to Step 4.

- or -

If Microsoft Visual J# .NET is not installed on your system, the Microsoft Visual J# .NET Redistributable Package 1.1 Setup window appears. Complete the following steps to install Microsoft Visual J# .NET.

a Click **Next**.

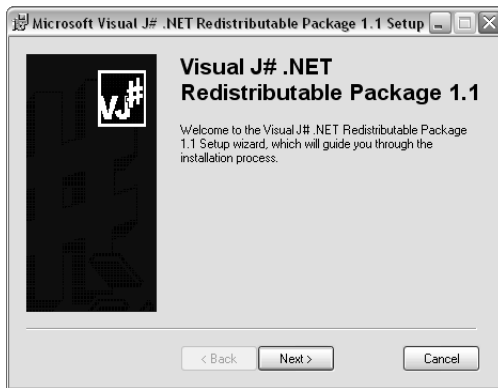


Figure 2.3 LexisNexis Total Search Microsoft Visual J# .NET Redistributable Package 1.1 Screen

b From the License Agreement screen, click **I agree**. The Microsoft Visual J# .NET Developer Agreement screen opens.

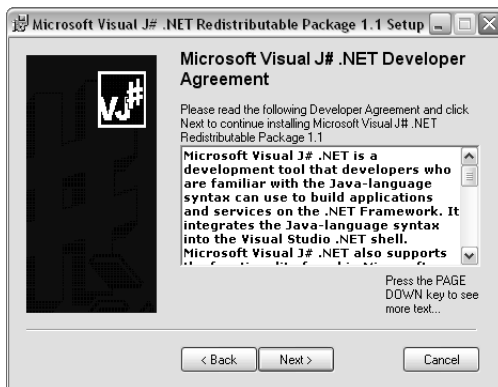


Figure 2.4 LexisNexis Total Search Microsoft Visual J# .NET Developer Agreement Screen

- c Click **Next**. The Installing Components screen opens. Once it completes, the LexisNexis Total Search iManage Connector - InstallShield Wizard screen opens.

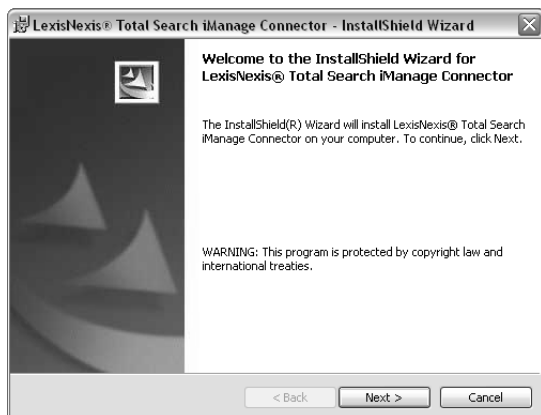


Figure 2.5 LexisNexis Total Search iManage InstallShield Wizard

- 4 Click **Next**. The Destination Folder screen opens.

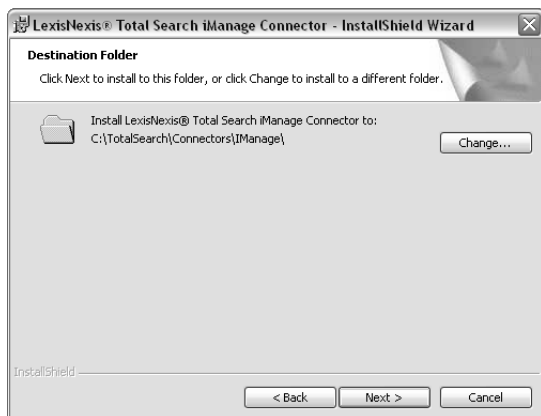


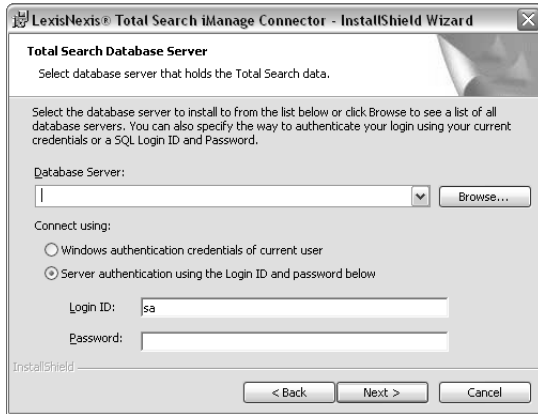
Figure 2.6 LexisNexis Total Search iManage Destination Folder Screen

- 5 Click **Next** to install this folder.

- or -

Click **Change** to install a different folder.

The LexisNexis Total Search Database Server screen opens.



Note: The information for the figure above applies to the Total Search Database Server and not the DMS Database Server.

- 6** Select the Database Server (use the **Browse** button if necessary).
- 7** Specify the authentication or connection method by selecting **Server authentication using the Login ID and password below**.
- 8** From the Ready to Install the Program screen, click **Install**. The InstallShield Wizard Completed screen opens.

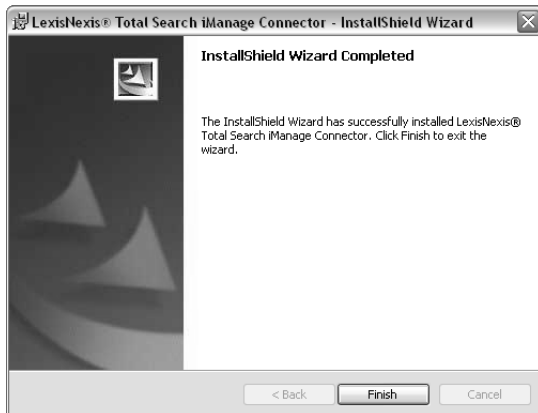


Figure 2.7 LexisNexis Total Search iManage Connector InstallShield Wizard Complete Screen

- 9** Click **Finish**.

Installing DOCS Open / DM Connectors

Use the *LexisNexis Total Search - Tools and Connectors Install CD* to install Total Search Connectors.

To Install the DOCS Open / DM Connector Manager

- 1 Insert the LexisNexis Total Search - Tools and Connectors Install CD in your CD drive.

The LexisNexis Total Search Install screen opens. (If autorun is not enabled on your system, run `tsauto.exe` on the CD root directory.)

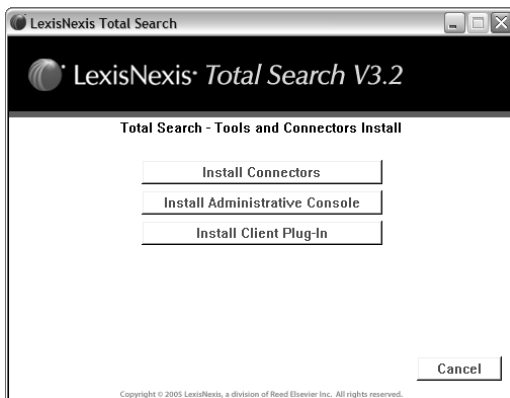


Figure 2.8 LexisNexis Total Search Install Screen

- 2 Click **Install Connectors**. The Connectors screen (shown below) opens.

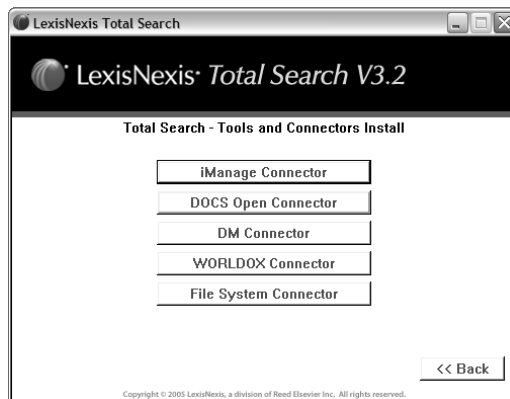


Figure 2.9 LexisNexis Total Search Connectors Screen

3 Click **DOCS Open Connector** or **DM Connector**.

The installer detects whether Microsoft® Visual J#® .NET is installed on your system. If it is already installed, the DOCS Open - DM Connector InstallShield Wizard appears. Proceed to Step 4.

- or -

If Microsoft Visual J# .NET is not installed on your system, the Microsoft Visual J# .NET Redistributable Package 1.1 Setup window appears. Complete the following steps to install Microsoft Visual J# .NET.

a Click **Next**.



Figure 2.10 LexisNexis Total Search Microsoft Visual J# .NET Redistributable Package 1.1 Screen

b From the License Agreement screen, click **I agree**. The Microsoft Visual J# .NET Developer Agreement screen opens.

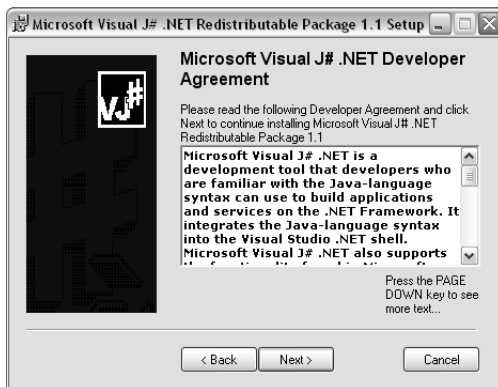


Figure 2.11 LexisNexis Total Search Microsoft Visual J# .NET Developer Agreement Screen

- c Click **Next**. The Installing Components screen opens. Once it completes, the LexisNexis Total Search DOCS Open - DM Connector - InstallShield Wizard screen opens.

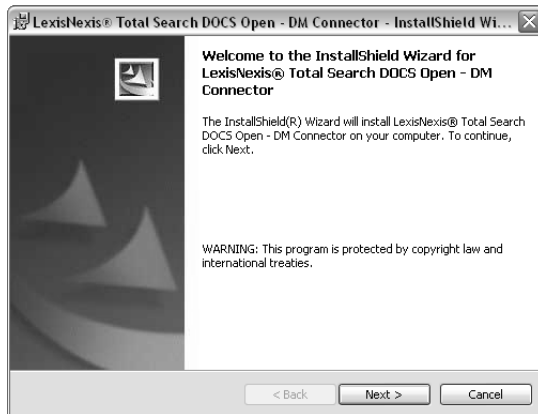


Figure 2.12 LexisNexis Total Search DOCS Open - DM Connector InstallShield Wizard

- 4 Click **Next**. The Destination Folder screen opens.

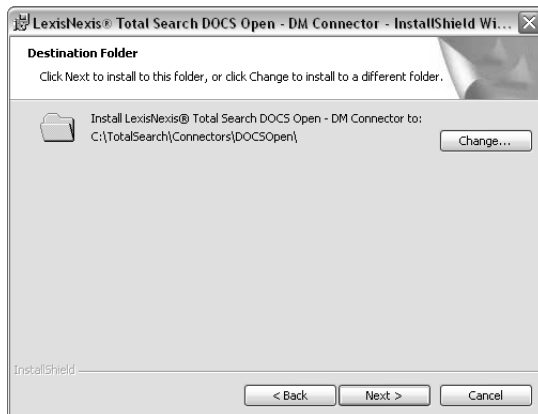


Figure 2.13 LexisNexis Total search DOCS Open - DM Destination Folder Screen

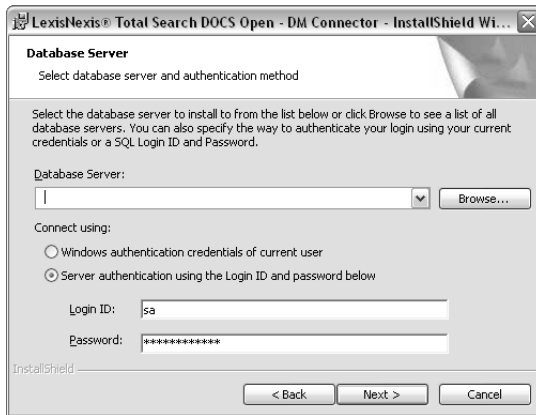
- 5 Click **Next** to install to this folder.

- or -

Click **Change** to install to a different folder.

The LexisNexis Total Search Database Server screen opens.

- 6 Select the Database Server (use the **Browse** button if necessary).



Note: The information for the figure above applies to the Total Search Database Server and not the DMS Database Server.

- 7 Specify the authentication or connection method by selecting **Server authentication using the Login ID and password below**.
- 8 Click **Next**. The Ready to Install the Program screen opens.



- 9 Click **Install**. The InstallShield Wizard Completed screen opens.
- 10 Click **Finish**.

Installing WORLDOX[®] Connectors

Use the *LexisNexis Total Search - Tools and Connectors Install CD* to install Total Search Connectors.

To Install the WORLDOX Connector Manager

- 1 Insert the LexisNexis Total Search - Tools and Connectors Install CD in your CD drive.

The LexisNexis Total Search Install screen opens. (If autorun is not enabled on your system, run *tsauto.exe* on the CD root directory.)

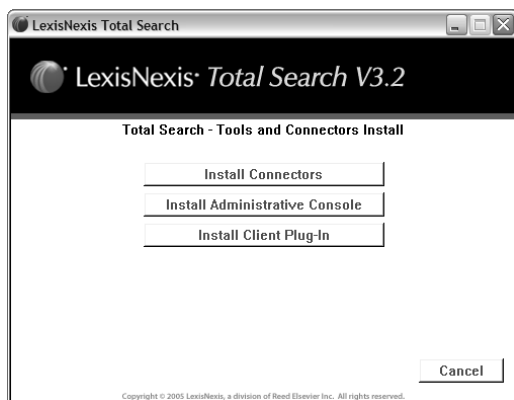


Figure 2.14 LexisNexis Total Search Install Screen

- 2 Click **Install Connectors**. The Connectors screen (shown below) opens.

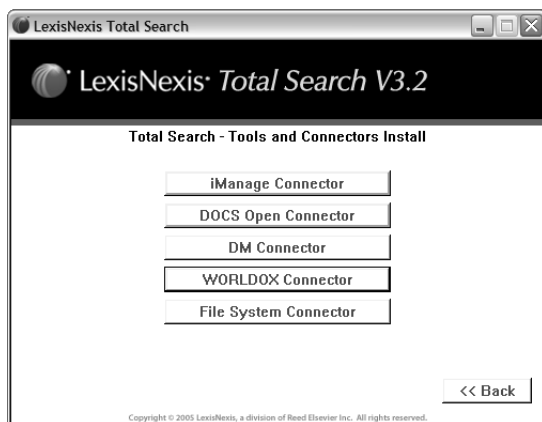


Figure 2.15 LexisNexis Total Search Connectors Screen

3 Click **WORLDOX Connector**.

The installer detects whether Microsoft® Visual J#® .NET is installed on your system. If it is already installed, the DOCS Open - DM Connector InstallShield Wizard appears. Proceed to Step 4.

- or -

If Microsoft Visual J# .NET is not installed on your system, the Microsoft Visual J# .NET Redistributable Package 1.1 Setup window appears. Complete the following steps to install Microsoft Visual J# .NET.

a Click **Next**.

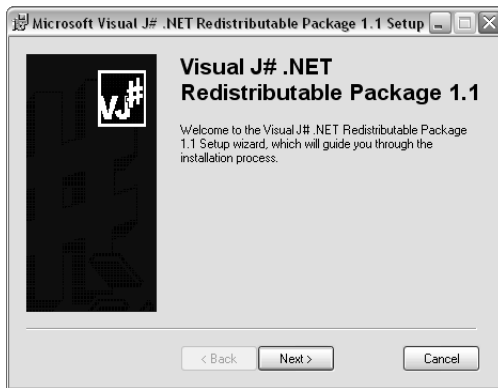


Figure 2.16 LexisNexis Total Search Microsoft Visual J# .NET Redistributable Package 1.1 Screen

b From the License Agreement screen, click **I agree**. The Microsoft Visual J# .NET Developer Agreement screen opens.

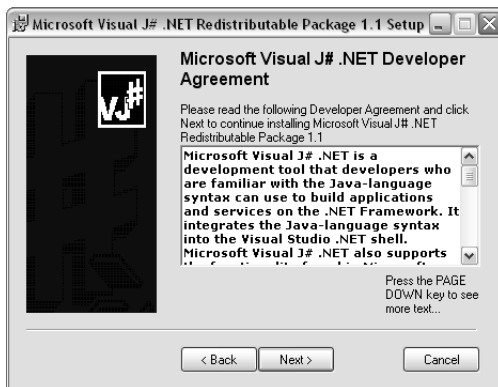


Figure 2.17 LexisNexis Total Search Microsoft Visual J# .NET Developer Agreement Screen

- c Click **Next**. The Installing Components screen opens. Once it completes, the LexisNexis Total Search WORLDOX Connector - InstallShield Wizard screen opens.

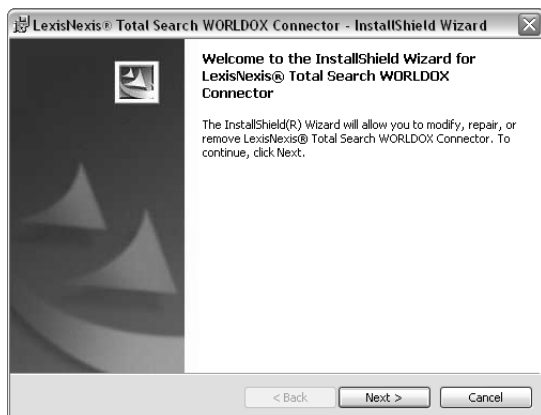


Figure 2.18 LexisNexis Total Search WORLDOX Connector - InstallShield Wizard

- 4 Click **Next**. The LexisNexis Total Search Destination Folder opens.

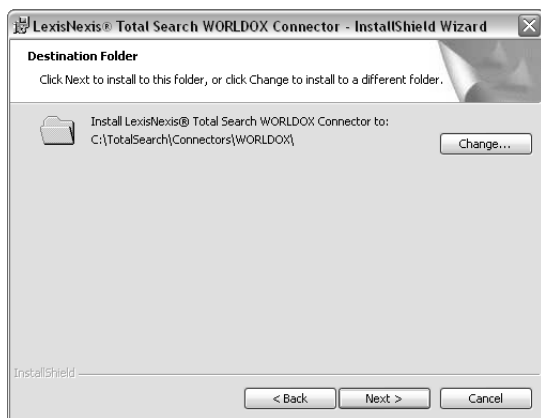


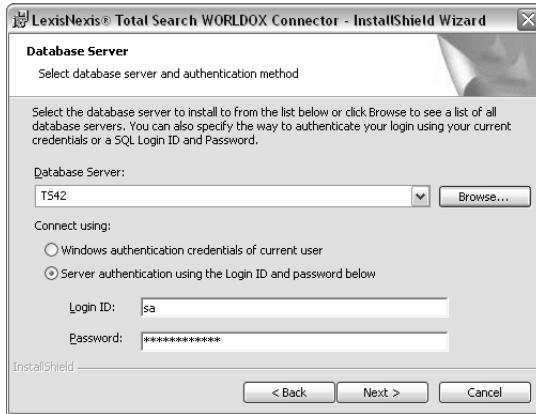
Figure 2.19 LexisNexis Total Search WORLDOX Connector Destination Folder Screen

- 5 Click **Next** to install to this folder.

- or -

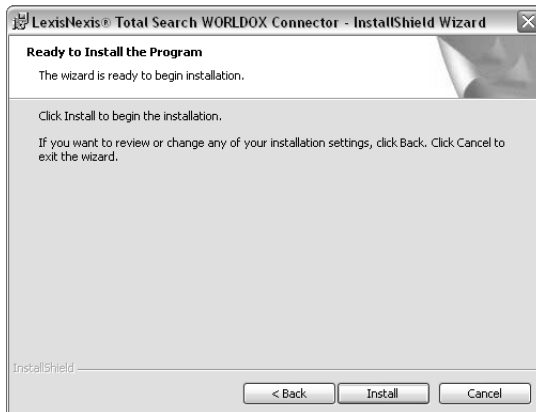
Click **Change** to install to a different folder.

The LexisNexis Total Server Database Server screen opens.



Note: The information for the figure above applies to the Total Search Database Server and not the DMS Database Server.

- 6** Select the Database Server (use the **Browse** button is necessary).
- 7** Specify the authentication or connection method by selecting **Server authentication using the Login ID and password below**.
- 8** Click **Next**. The Ready to Install the Program screen opens.



- 9** Click **Install**. The InstallShield Wizard Completed screen opens.
- 10** Click **Finish**.

Installing File System Connectors

Use the *LexisNexis Total Search - Tools and Connectors Install CD* to install Total Search Connectors.

To Install the File System Connector Manager

- 1 Insert the LexisNexis Total Search - Tools and Connectors Install CD in your CD drive.

The LexisNexis Total Search Install screen opens. (If autorun is not enabled on your system, run `tsauto.exe` on the CD root directory.)

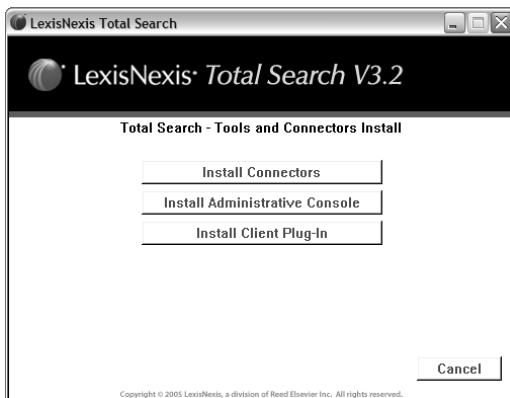


Figure 2.20 LexisNexis Total Search Install Screen

- 2 Click **Install Connectors**. The Connectors screen (shown below) opens.

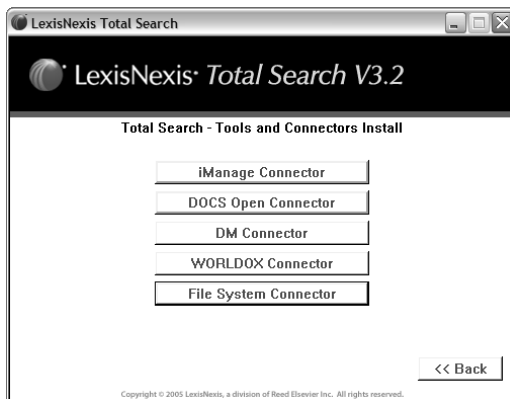


Figure 2.21 LexisNexis Total Search Connectors Screen

3 Click **File System Connector**.

The installer detects whether Microsoft® Visual J#® .NET is installed on your system. If it is already installed, the DOCS Open - DM Connector InstallShield Wizard appears. Proceed to Step 4.

- or -

If Microsoft Visual J# .NET is not installed on your system, the Microsoft Visual J# .NET Redistributable Package 1.1 Setup window appears. Complete the following steps to install Microsoft Visual J# .NET.

a Click **Next**.



Figure 2.22 LexisNexis Total Search Microsoft Visual J# .NET Redistributable Package 1.1 Screen

b From the License Agreement screen, click **I agree**. The Microsoft Visual J# .NET Developer Agreement screen opens.

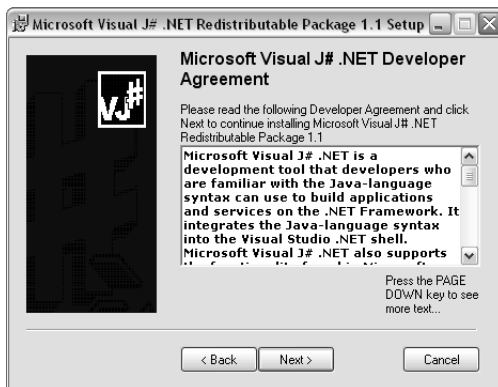


Figure 2.23 LexisNexis Total Search Microsoft Visual J# .NET Developer Agreement Screen

- c Click **Next**. The Installing Components screen opens. Once it completes, the LexisNexis Total Search File System Connector - InstallShield Wizard opens.

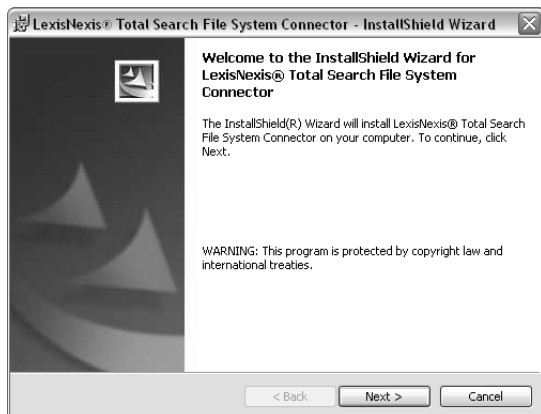


Figure 2.24 LexisNexis Total Search File System Connector - InstallShield Wizard

- 4 Click **Next**. The LexisNexis Total Search File System Destination Folder opens.

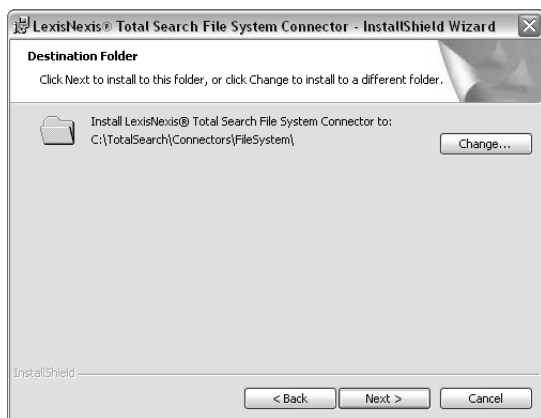


Figure 2.25 LexisNexis Total Search File System Connector Destination Folder Screen

- 5 Click **Next** to install this folder.

- or -

Click **Change** to install a different folder.

The LexisNexis Total Server Database Server screen opens.



Note: The information for the figure above applies to the Total Search Database Server and not the DMS Database Server.

- 6** Select the Database Server (use the **Browse** button is necessary).
- 7** Specify the authentication or connection method by selecting **Server authentication using the Login ID and password below**.
- 8** Click **Next**. The Ready to Install the Program screen opens.



- 9** Click **Install**. The InstallShield Wizard Completed screen opens.
- 10** Click **Finish**.

Administrative Console and Client Plug-In Installation

General

The information detailed in this chapter provides the user with the procedures needed to install the LexisNexis® Total Search Administrative Console and the LexisNexis Total Search Client Plug-In.

The Plug-In (a Browser Helper Object) works within Internet Explorer and must be installed on client machines before LexisNexis Total Search will work. The primary function of the Plug-In is to replace browser text, and to insert links into the Search Form and answer sets for IDR documents.

Also see “*To Push the Plug-In out to Total Search Users*” on page 40 for additional Plug-In information.

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Installing the LexisNexis Total Search Client Plug-in.....	page 37

Installing the LexisNexis Total Search Administrative Console

Use the *LexisNexis Total Search - Tools and Connectors Install CD* to install the LexisNexis Total Search Administrative Console.

To Install LexisNexis Total Search Administrative Console

- 1 Insert the LexisNexis Total Search - Tools and Connectors Install CD in your CD drive.

The LexisNexis Total Search Install screen opens. (If autorun is not enabled on your system, run **tsauto.exe** on the CD root directory.)

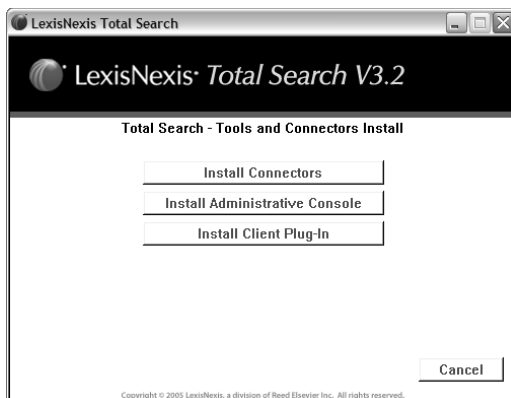


Figure 3.1 LexisNexis Total Search Install Screen

- 2 Click **Install Server Administrative Console**. The InstallShield Wizard opens.

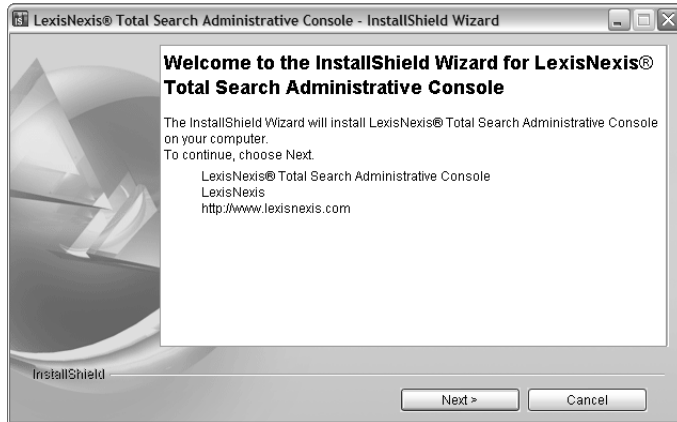


Figure 3.2 LexisNexis Total Search Administrative Console InstallShield Wizard Welcome Screen

3 Click **Next**. The Directory Name screen opens.

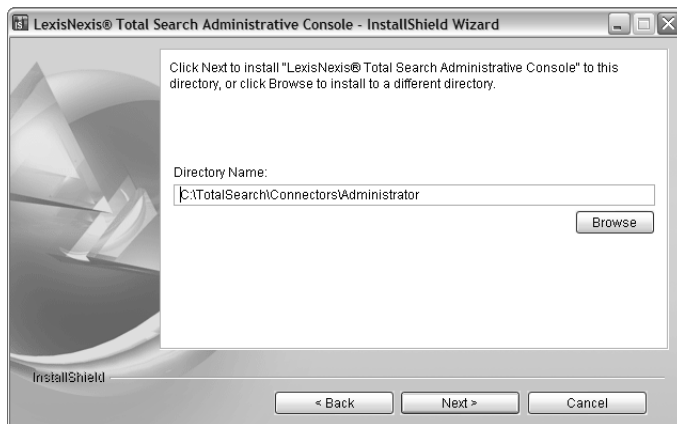


Figure 3.3 LexisNexis Total Search Directory Name Screen

4 Click **Next** to install the LexisNexis Total Search Administrative Console to this directory.

- or -

Click **Browse** to install to a different directory.

The LexisNexis Total Search Server/User Information screen opens.

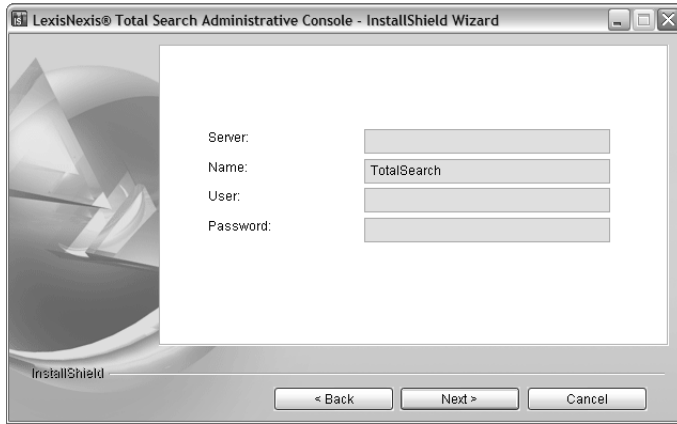


Figure 3.4 LexisNexis Total Search Server/User Information Screen

5 Enter the name of the LexisNexis Total Search Server.

6 Enter the SQL user name for the LexisNexis Total Search server.

7 Enter the SQL password for the LexisNexis Total Search server. Click **Next**. A Summary Information screen opens.

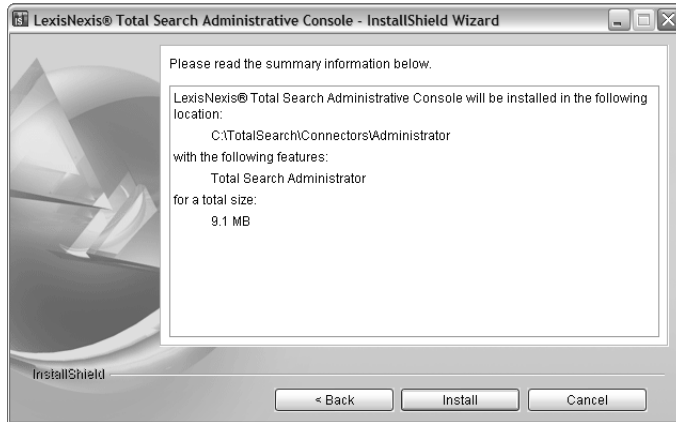


Figure 3.5 LexisNexis Total Search Administrative Console InstallShield Wizard Summary Information Screen

8 Click **Install**. The InstallShield Wizard Successfully Installed screen opens.

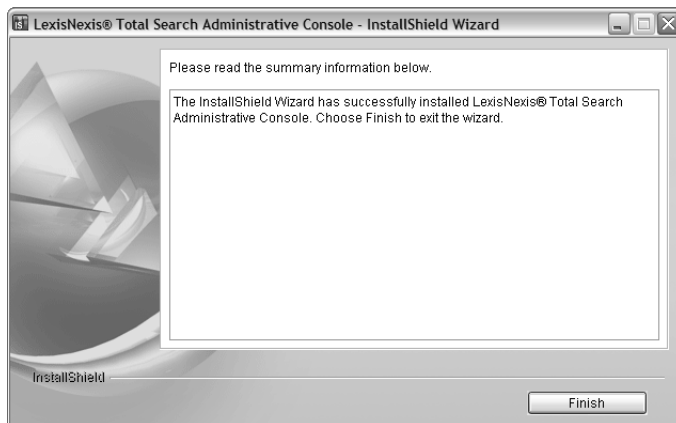


Figure 3.6 LexisNexis Total Search Administrative Console InstallShield Wizard Installation Complete Screen

9 Click **Finish**.

Installing the LexisNexis Total Search Client Plug-in

Use the *LexisNexis Total Search - Tools and Connectors Install CD* to install the LexisNexis Total Search Client Plug-In.

To Install LexisNexis Total Search Client Plug-In

- 1 Insert the LexisNexis Total Search - Tools and Connectors Install CD in your CD drive.

The LexisNexis Total Search Install screen opens. (If autorun is not enabled on your system, run `tsauto.exe` on the CD root directory.)

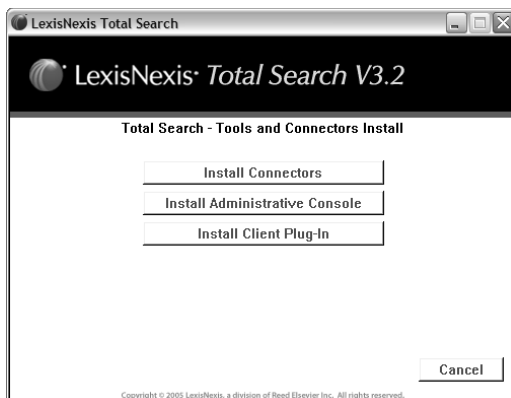


Figure 3.7 LexisNexis Total Search Install Screen

- 2 Click **Install Client Plug-In**. The LexisNexis Total Search Client Plug-In screen opens.



Figure 3.8 LexisNexis Total Search Client Plug-In InstallShield Wizard

- 3 Click **Next**. The Destination Folder screen opens.



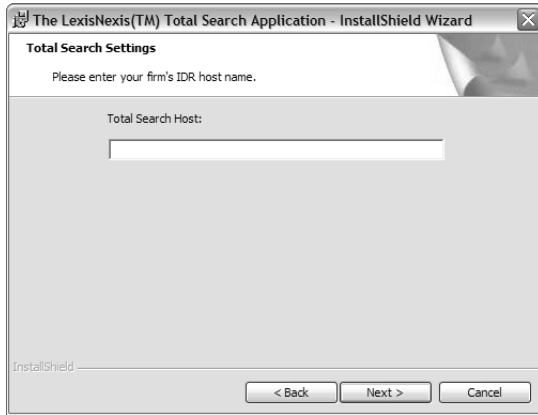
Figure 3.9 LexisNexis Total Search Client Plug-In Destination Folder Screen

- 4 Click **Next** to install this folder.

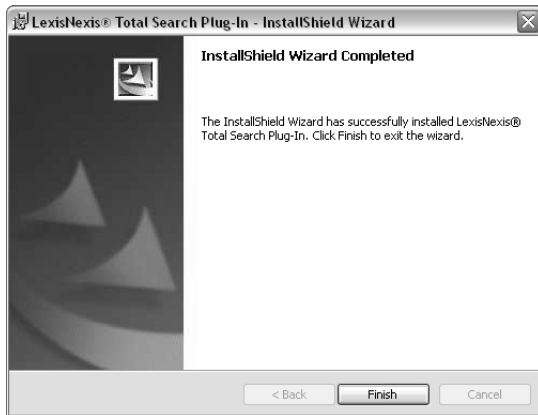
- or -

Click **Change** to install a different folder.

The LexisNexis Total Search Settings screen opens.



- 5 Enter your firm's Total Search Server name. Click **Next**. The Ready to Install the Program screen opens.
- 6 Click **Install**. The LexisNexis Total Search Plug-In InstallShield Wizard Completed screen opens.



- 7 Click **Finish**.
-

To Push the Plug-In out to Total Search Users

- The following script should be run by the network administrator :

```
msiexec /qb /i TSPlugin.msi IDRHOSTNAME=servername
```

where:

- "msiexec" provides a means to install, modify, and perform operations on Windows Installer from the command line
- "qb" provides basic user interface capabilities
- "i" is the package/product code
- "TSPlugin.msi" is the package file
- "servername" is the name of the Total Search server.

Refer to the Microsoft® Windows® Installer online Help for additional information regarding the msiexec.

Appendix A: Opening a Search Form

The Search Form is a Web page. When the page is opened, the user is automatically identified based on their network ID. There are multiple ways the Search Form can be opened. The most common methods to open the Search Form are: **1)** directly from the browser; **2)** by creating a shortcut on the desktop; **3)** by adding the URL to Favorites; or **4)** by linking to the Search Form from the intranet. Each of these methods are briefly described in the following paragraphs.

To Open the Search Form Directly From a Web Browser

- In the Address field of the Web browser, type the following and press ENTER:

```
http://servername/totalsearchweb/core/fromrender.do
```

...where servername is the name of the Total Search server.

To Open the Search Form from by Creating a Desktop Shortcut

- 1** Open the Search Form in the Web browser.
 - 2** From the browser's main menu, go to **File ► Send ► Shortcut to Desktop**.
 - 3** Double-click the shortcut icon on the desktop.
-

To Open the Search Form by Adding to Favorites

- 1** Open the Search Form in the Web browser.
 - 2** From the browser's main menu, go to **Favorites ► Add to Favorites**. The Add Favorites screen opens.
 - 3** Click **OK** to add the Search Form page to your Favorites list.
-

By Linking From the Intranet

- Create a new link or an appropriate Intranet page which points to the URL for the Search Form.

LexisNexis
9443 Springboro Pike
Miamisburg, Ohio USA 45342
North America: 1-800-543-6862



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