

THOMSON REUTERS

WESTLAW™



WEST KM EXPRESS

ADMINISTRATOR GUIDE

VERSION 4.9



THOMSON REUTERS™

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Welcome to West km Express, a knowledge management product designed for small- and medium-sized legal organizations. It allows staff members at your organization to easily find and reuse your organization's best work.

With West km Express, you receive the core software components of West km, which provide fundamental indexing and search capabilities, as well as

- the RID (reference identifier) citation indexing component, which integrates KeyCite with your internal, citation-rich documents, and
- the analyzer component, which extracts and tags significant content in documents and provides metadata that is searchable and displayed in search results and summaries.

Staff members can

- retrieve internal documents using full-text search methods
- build a citations list of internal documents that cite a Westlaw document
- access internal documents and Westlaw content simultaneously
- link directly from a document to related internal documents and to content on WestlawNext or Westlaw Classic

1.1 About This Guide

The overall process for setting up West km Express is shown in Figure 1-1.

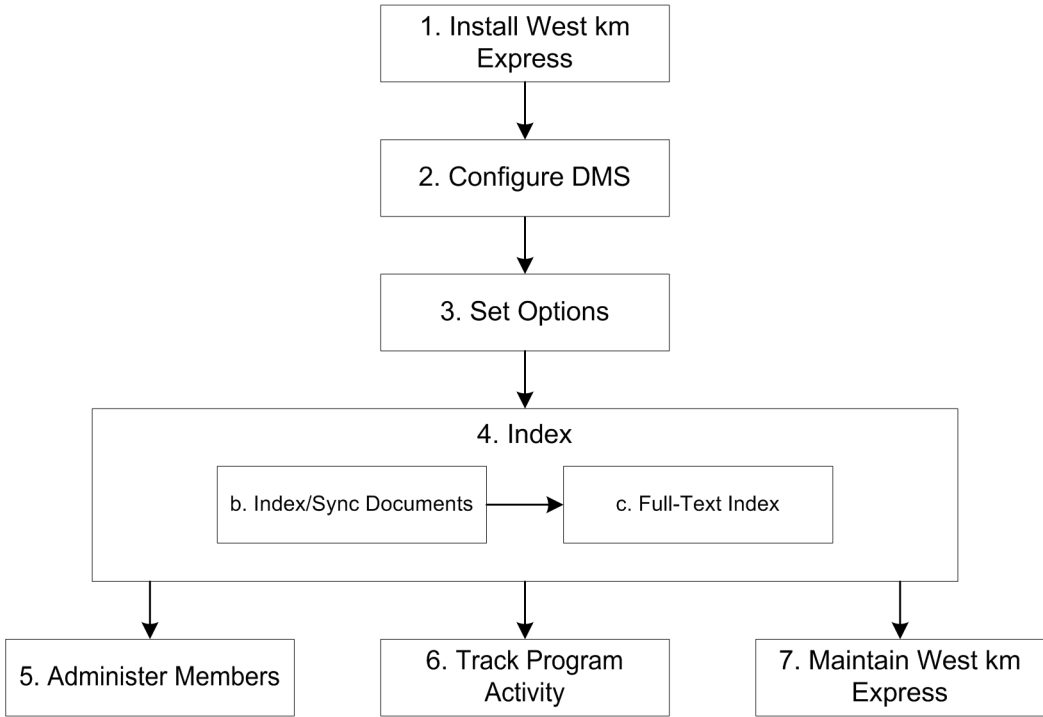


Figure 1-1. West km setup process

This administrator guide explains how to complete these tasks. It assumes you are familiar with your organization's DMS and network administration. Familiarity with Microsoft Windows Server technology (e.g., IIS, SQL Server, server administration) and networking is recommended.

After installation, you may also find these guides of interest:

- **West km user guides:** explain how to use West km Express in detail.
- **West km quick reference guides:** briefly explain how to use West km Express.

To access these guides, click **Guides** in the West km online help system (for information on accessing online help, see “1.4 Product Information” on page 7).

1.2 System Overview

1.2.1 SYSTEM DIAGRAM

A system diagram of West km Express is shown in Figure 1-2.

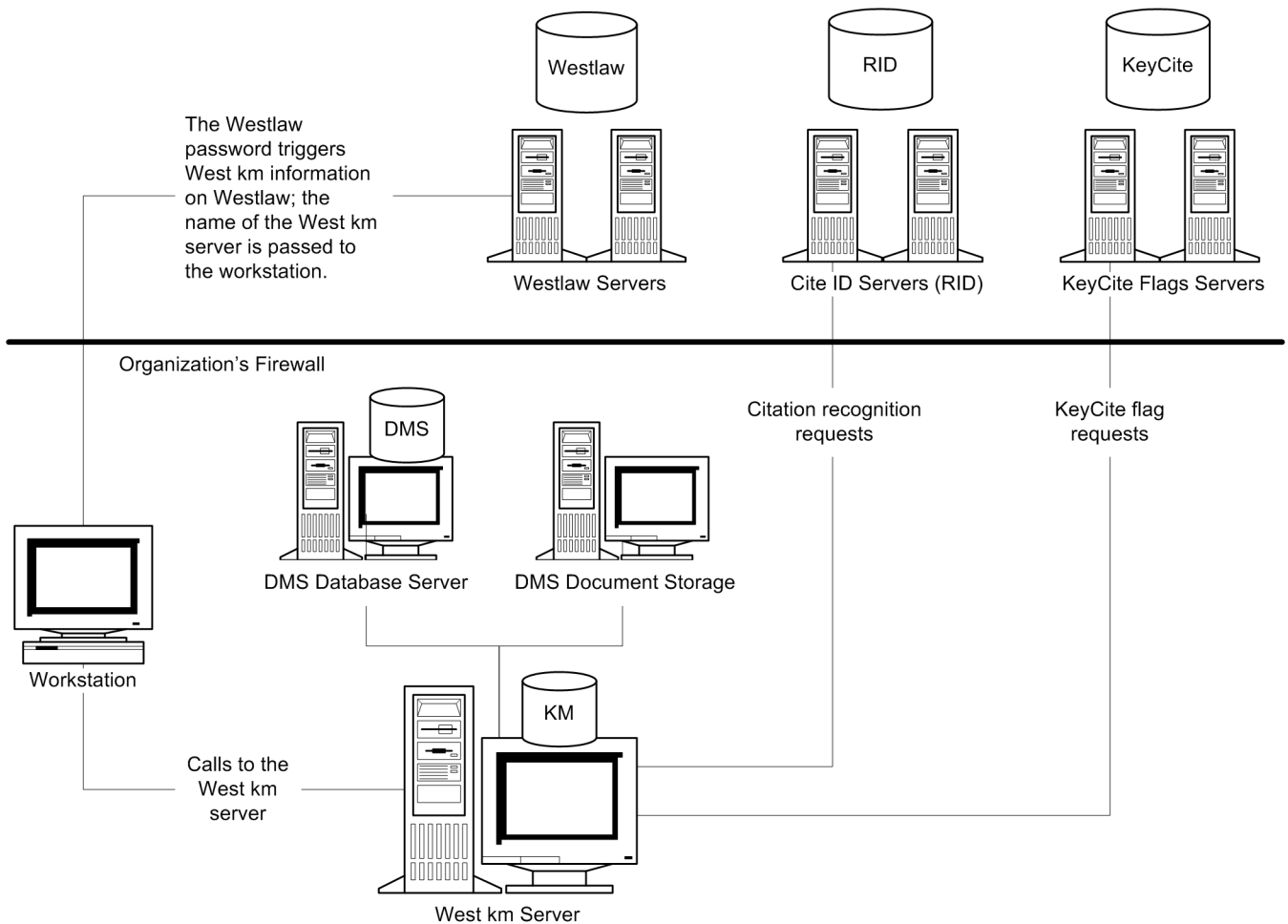


Figure 1-2. West km system diagram

1.2.2 SERVER COMPONENTS

West km server: The West km server is the center of system operations and performs actions including administration, indexing, searching, and document display. During indexing, it

- retrieves documents and converts and stores them in HTML format
- finds and identifies citations in documents
- extracts and tags significant content in documents
- records document information (e.g., profile metadata, citation locations) in the West km database

West km databases:

West km databases on the West km server perform the following functions:

- The West km database stores metadata about documents (e.g., KeyCite data about document citations), document profile metadata, data for indexing scheduling.
- The West km RID database stores Westlaw document references for citation identification. Once a citation is found, a call is made to the Cite ID (RID) servers at Thomson Reuters to validate the citation and return serial numbers and other metadata for the target document.
- The full-text searching database stores information about documents in your HTML storage locations.
- The search component uses these databases for full-text indexing and searching:
 - The CCI database contains information about how documents are indexed and searched.
 - The Doc database contains information about the documents that are indexed.
 - The Persist database contains search state information.

DMS server: West km gets your organization's documents and related metadata from where documents are housed on your organization's document management system.

Cite ID servers (RID): RID servers at Thomson Reuters validate citations found in documents and return serial numbers and other metadata for linking to the target documents on WestlawNext and Westlaw Classic.

Westlaw servers: Westlaw servers at Thomson Reuters host Westlaw services.

KeyCite flags servers: KeyCite flags servers at Thomson Reuters determine the current KeyCite status of a citation. When a West km document is opened that contains citations, KeyCite flags servers are called to get the latest status flags.

1.3 Accessing West km Express

You can retrieve documents that you index with West km Express via

- the West km interface
- WestlawNext
- Westlaw Classic

The West km interface is also used to administer the application and to index documents.

1.3.1 WESTLAWNEXT AND WESTLAW CLASSIC INTERFACES

You can retrieve indexed West km documents via the WestlawNext and Westlaw Classic (Figure 1-3) interfaces. West km members can search just your organization's documents, or they can search your organization's documents and Westlaw documents simultaneously.

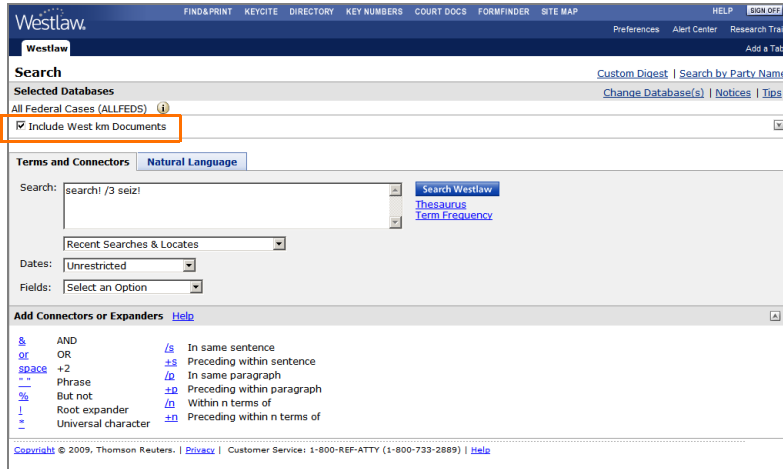


Figure 1-3. Westlaw Classic interface

1.3.2 WEST KM INTERFACE

The West km interface (Figure 1-4) includes the following product tab and administrative link:

- The **Litigation** tab is used to retrieve indexed documents in West km Express.
- The **Setup** link is used to administer West km Express.

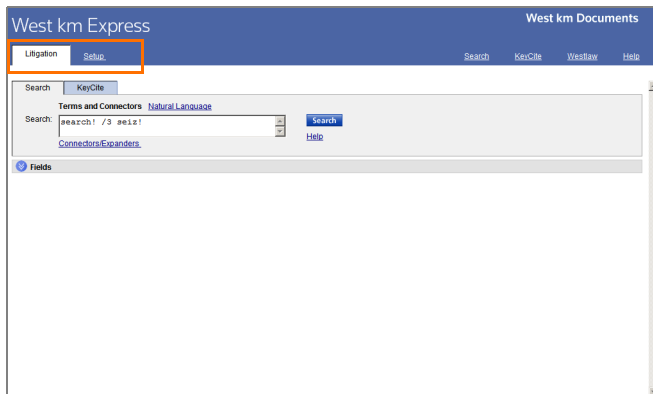


Figure 1-4. West km interface

To access the Litigation tab after West km Express is installed, open Internet Explorer and go to `hostname/km/pldefault.aspx`, where `hostname` is the name of your West km server on your network.

To access the setup pages, complete these steps:

1. Open Internet Explorer and go to *hostname/km/plhome.aspx*, where *hostname* is the name of your West km server on your network.
2. Click the **Setup** link (Figure 1-5) and then choose the setup page you want to access.

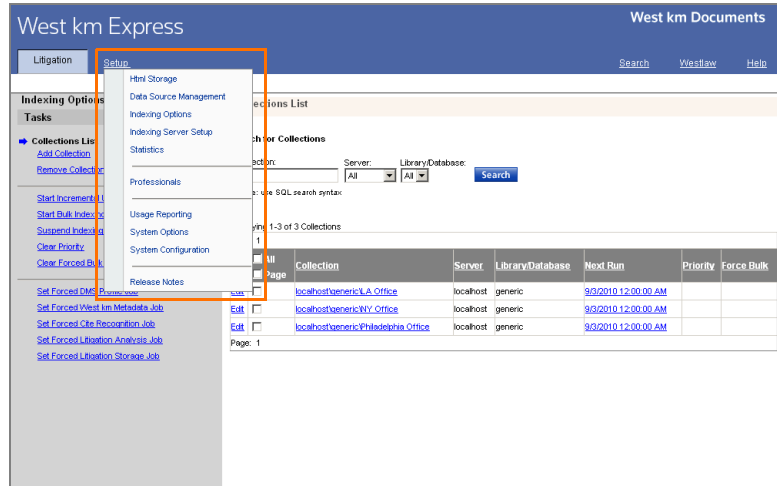


Figure 1-5. Setup link

1.3.3 WEST KM SETUP PAGES

The setup pages allow you to perform administrative functions for West km Express, including the following:

- **HTML Storage:** Schedule or launch full-text indexing of documents. For details, see “7.5 Full-Text Indexing” on page 78.
- **Data Source Management:** Designate DMS databases or libraries that contain the document collections you want indexed. For details, see “6.2 Adding Data Source Connections” on page 55.
- **Indexing Options:** Define and index document collections. For details, see “Indexing Documents” on page 68.
- **Indexing Server Setup:** Set options for indexing. For details, see “6.4 Setting Up the Indexing Server” on page 62.
- **Statistics:** Monitor the processing of documents during indexing. For details, see “9.1 Monitoring Indexing Processes” on page 96.
- **Professionals:** Administer your West km members. For details, see “Administering West km Members” on page 85.
- **Usage Reporting:** View West km usage data for your organization. For details, see “9.4 Reporting on Usage” on page 108.
- **System Options:** Set system options related to DMS integration, indexing, security, server configuration, and user interface display. For details, see “4.1 Setting System Options” on page 32.
- **System Configuration:** View your West km configuration, including available product components and the versions of installed software components. For details, see “2.4 Viewing Your West km Configuration” on page 20.
- **Release Notes:** Get the latest information about West km releases, including features and enhancements, recently fixed issues, and known issues and work-arounds.

1.4 Product Information

West km product information is available at these locations:

- Online help is available in the West km interface. In the navigation links at the top of the West km pages, click **Help** for general help information. Click **Help** on a particular page for information about tasks related to that page.
- Documentation in PDF is available in the online help by clicking **Guides**.
- Release notes, including information on new features and enhancements in releases of West km, are available in the online help by clicking **Release Notes**.
- The website for West km is available at www.westkm.com.
- The West km Knowledge Base is available at kbportal.thomson.com/westsolutions. (A username and password is required and can be obtained by calling 1-888-WESTKM1.)

2 Installing West km Express

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The following software is installed with West km Express:

- Java Runtime Environment (if it's not detected on your server, West km Express will install it)
- Microsoft SQL Server Express (If Microsoft SQL Server is not detected on your server during installation, West km Express will install SQL Server Express)
- West km (server software)
- West km (indexing service)
- Stellent Outside In (third-party software for converting native documents to HTML)
- Search Component
- Full-Text Search
- West km RID

The following databases are created with the installation of West km Express:

- West km database (km)
- Search Component databases (CCI, Doc, and Persist)
- Full-Text Search database (FTSearch)
- West km RID database (kmRID)

If you are using Microsoft SQL Server Express, note the following:

- There is a 10 GB maximum database size (data files but not log file are counted).
- You can view the size of your database files (.mdf files) at this location:
[Drive]:\Program Files\Microsoft SQL Server\MSSQL10.SQLEXPRESS\MSSQL\Data.

To install West km Express, complete the steps in the following subsections.

2.1 What You Need

2.1.1 SYSTEM AND SOFTWARE REQUIREMENTS

Prior to installing West km Express, visit www.westkm.com and click **West km Express** under *Quick Links* to make sure you meet the hardware and software requirements. If you haven't already installed Java Runtime Environment, Microsoft .NET Framework, Windows Installer, or Windows PowerShell, you can install the software with West km Express.

2.1.2 OTHER REQUIREMENTS

You also need the following:

- A user account that has local administrator rights on the West km server in order to install the software. If SQL Server already exists on your server, the user account must have access to the SQL Server service under the sysadmin server role.
- On a West km server with Windows Server 2008 R2, the User Account Control (UAC) disabled or set to Never Notify.
- Setup files and installation folders for the West km software (do not change the folder names, which are dexter, fts, km, novus, and rid).
- Your West km product key.
- A Windows domain user account (or several local user accounts) with access to all NTFS documents that West km Express will access directly for indexing, including NTFS documents managed by eDOCS DM and ProLaw. This is referred to as the *remote access account*.

2.1.3 REMOTE ACCESS ACCOUNT REQUIREMENTS

When creating a remote access account to be used in West km Express, note that the following characters are not supported in names, usernames, and passwords when running the West km Installation Wizard:

- " quotation mark
- & ampersand
- ' apostrophe
- < less-than sign
- > greater-than sign

2.1.4 AUTHENTICATION METHODS

When you install West km Express, you will be prompted to select one of the following authentication methods to control staff member access to West km Express.

- **None:** Control access via two URLs, one for users and one for administrators. “None” is the default authentication method.
- **Integration Windows Authentication (IWA):** If your organization administers computer users in a Windows domain, you can control access to West km via Windows network IDs stored in West km (without passwords).
- **West km Custom Authentication:** If your organization does not administer computer users in a Windows domain, you can control access to West km via usernames and passwords that you administer in West km.

For additional details about the configuration that is required for authentication to function properly, see “Appendix C: Authentication and Document Security Configuration” on page 140.

To change the authentication method after installation, re-run the installation. For details, see “2.5 Updating West km Express” on page 21.

2.2 Installing Databases and Software

Complete the steps in the following subsections to get West km software, copy West km software to the West km server, install prerequisite software, and install West km software.

The overall process for installing West km Express is shown in Figure 2-1.

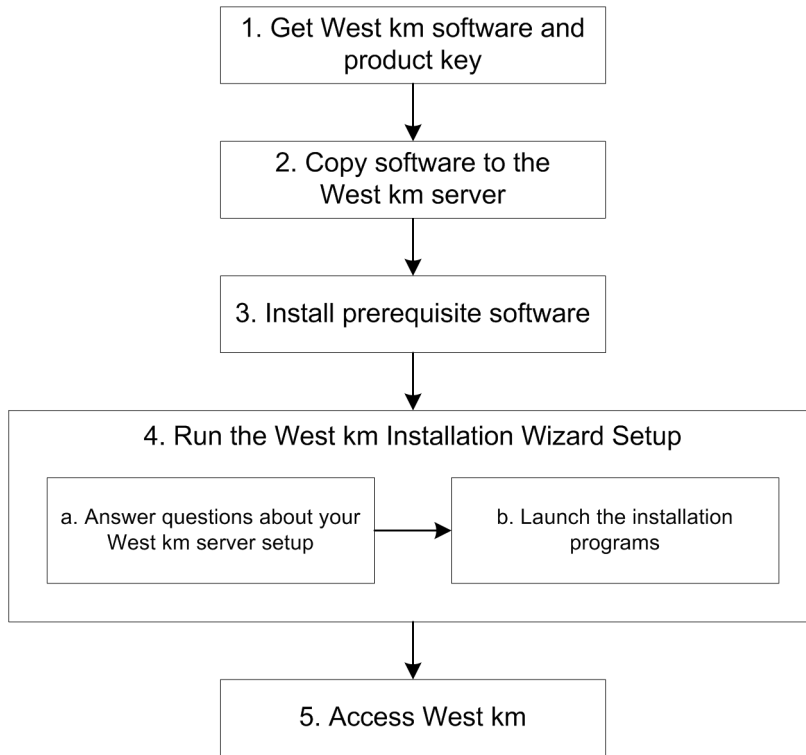


Figure 2-1. West km installation process

2.2.1 COPYING SETUP FILES

Your West km representative will provide you with your organization's product key and instructions for downloading the West km installation suite from the knowledge base. Download and unzip the files to a local path on the server for West km Express, as shown in Figure 2-2.

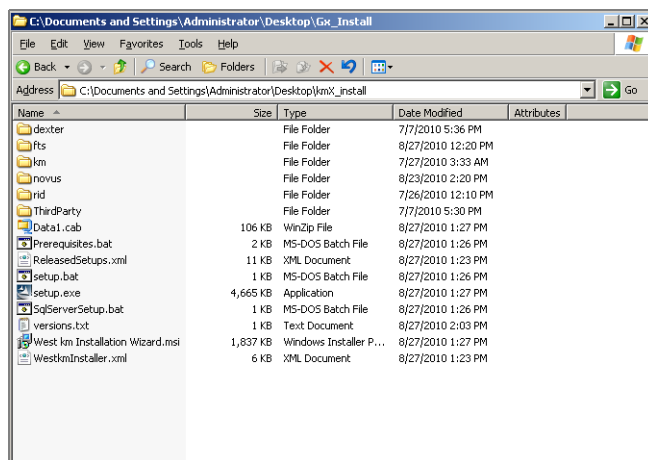


Figure 2-2. West km setup files

2.2.2 INSTALLING PREREQUISITE SOFTWARE

To install prerequisite software for West km Express, complete these steps:

1. After you download and unzip the West km setup files, right-click the **prerequisites.bat** file in the top-level folder and click **Run As Administrator**.

If the prerequisite software is not detected on your server, it is installed (Figure 2-3). Depending on the software you need, this process may take several minutes.

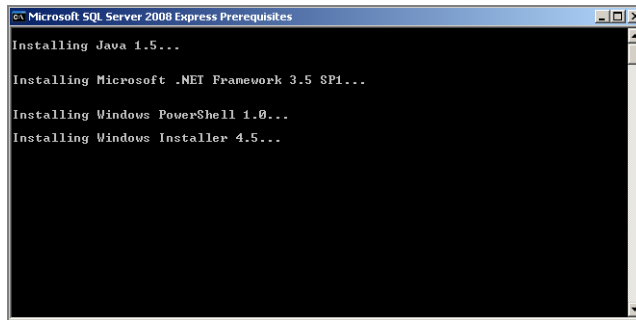


Figure 2-3. Prerequisite software installation

2. When the installations are complete, restart your West km server.
It is important that you restart your West km server after installing the prerequisite software. Otherwise, West km Express will not install correctly.

2.2.3 RUNNING THE WEST KM INSTALLATION WIZARD

To install West km Express, complete these steps:

1. Navigate to the top level of the setup files. (Make sure you are at the top level and not in a subfolder before proceeding.)
2. Right-click **setup.exe** and click **Run As Administrator** to start the West km Installation Wizard.
3. In the Setup dialog box of the West km Installation Wizard (Figure 2-4), click **Next** to continue.

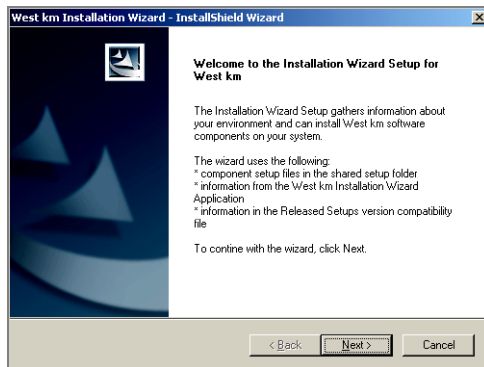


Figure 2-4. West km Installation Wizard Setup dialog box

4. In the Welcome dialog box of the the West km Installation Wizard Application (Figure 2-5), do one of the following and then click **Next** to continue:
 - If the *Server Setup File* section is displayed in the dialog box and you do not have a *ServerSetup.xml* file, make no changes. When the wizard completes, a file will be saved to the location where the West km Installation Wizard is running.

- If the *Server Setup File* section is displayed in the dialog box and you have a ServerSetup.xml file containing information about your West km server setup, type the path and file name to this file. (When the wizard completes, a new file will be saved to the location where the West km Installation Wizard is running.)

Note If the wizard locates the ServerSetup.xml file in your setup location, the *Server Setup File* section does not display.

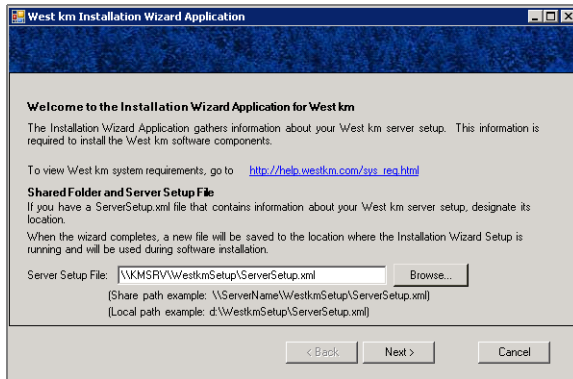


Figure 2-5. West km Installation Wizard Application, Welcome dialog box

5. If you are asked if you want to jump to the end of the West km Installation Wizard Application (Figure 2-6 on page 13), do one of the following:
 - If your product key and other setup information has not changed since you last ran the wizard and you have no need to review it, click **Yes**. The Finalize Setup dialog box is then displayed. To continue, click **Finalize** and then see “2.2.3.1 Installing Software” on page 16 for additional instructions.
 - If your product key or any other setup information has changed since you last ran the wizard, click **No** and proceed with the next step.

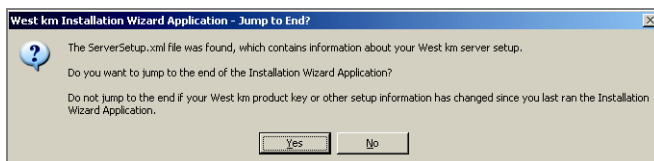


Figure 2-6. West km Installation Wizard Application, Jump to End prompt

Note The jump to end option is not available if (1) the ServerSetup.xml file is not found, (2) the version of the installation wizard application is different from the version recorded in the ServerSetup.xml file, or (3) the server on which you are running the wizard is not recorded in the ServerSetup.xml file.

6. In the Product Key dialog box (Figure 2-7), type the West km product key provided to you by your West km representative and click **Next**.

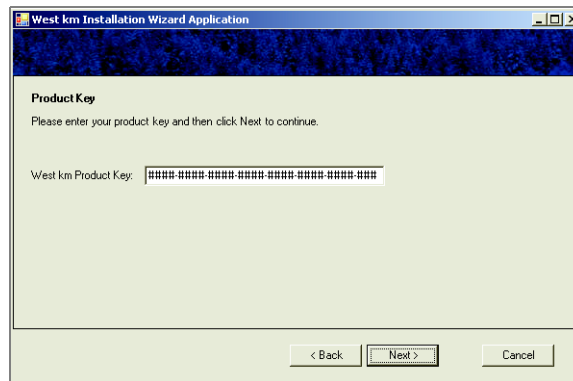


Figure 2-7. West km Installation Wizard Application, Product Key dialog box

7. In the West km Server dialog box (Figure 2-8), do the following and then click **Next**:
 - a. Under *Authentication Method*, select an authentication method to control staff member access to West km. For details, see “2.1.4 Authentication Methods” on page 10.

Note If you select West km or IWA authentication, you will be prompted in the next dialog box to enter the necessary information to set up the initial West km administrative user.
 - b. From the *West km Install Drive* drop-down list, choose the drive letter where you want West km Express software to be installed. (The drive with the most free disk space is automatically selected.)
 - c. In the *Hostname* text box, type the full server name with the domain where you are installing West km Government Express software (e.g., **KMSRV.yourcompany.com**). If you don’t know your hostname, leave this text box blank and West km Express will automatically use your server name.
 - d. If you will install an SSL certificate on your West km server to establish secure sessions (via https) with browsers, select the **Use SSL** check box.
 - e. If Microsoft SQL Server is already installed, choose the version to be used with West km Express from the Microsoft SQL Server drop-down list. If desired, enter a username and password for a database user account with db_owner rights that can be used for West km databases after installation. If you don’t enter an account, one will be created automatically.
 - f. Under *Remote Access Account*, type the username and password for a Windows domain user account (or local user account) with access to all NTFS documents that West km Express will access directly for indexing, including NTFS documents managed by eDOCS DM and ProLaw. If you do not have a Windows domain, you can create local user accounts with the same name and password at all locations.
 - For a domain user account, enter the username in this format: *domain\user*.
 - For a local user account, enter the username in this format: *server\user*.

Note See name and password limitations at “2.1.3 Remote Access Account Requirements” on page 10.

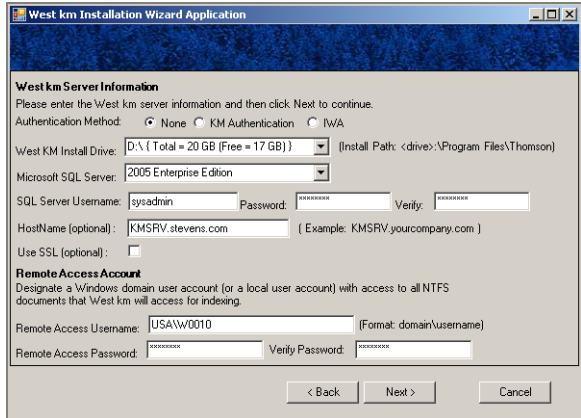


Figure 2-8. West km Installation Wizard Application, West km Server dialog box

8. In the Finalize Setup dialog box (Figure 2-9), do the following:
 - a. A ServerSetup.xml file containing your server setup information is automatically saved to the location where the West km Installation Wizard is running when you continue. If you want to save a copy of the file to a backup location, select **Save a backup copy of the xml** and type a folder location in the text box.
 - b. Click **Finalize** and see “2.2.3.1 Installing Software” in the following subsection for additional instructions.

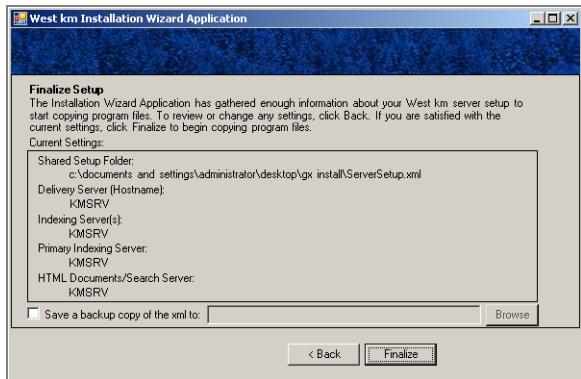


Figure 2-9. West km Installation Wizard Application, Finalize Setup dialog box

2.2.3.1 Installing Software

After the installation wizard application gathers your server setup information, the West km Installation Wizard starts the software installation process.

1. If you have West km software components already installed on the server, they are listed in the Installed Software Components dialog box (Figure 2-10).

Click **Next** to continue.

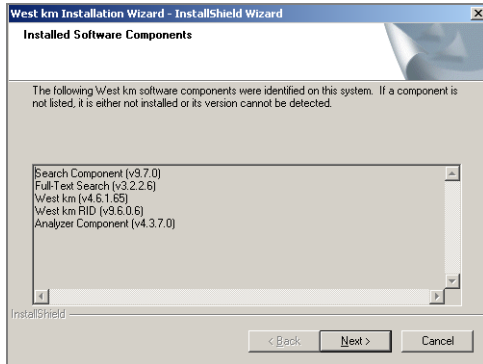


Figure 2-10. West km Installation Wizard, Installed Software Components dialog box

2. The West km software components that are identified for installation are listed in the Available Software Components dialog box (Figure 2-11).

Click **Next** to continue.

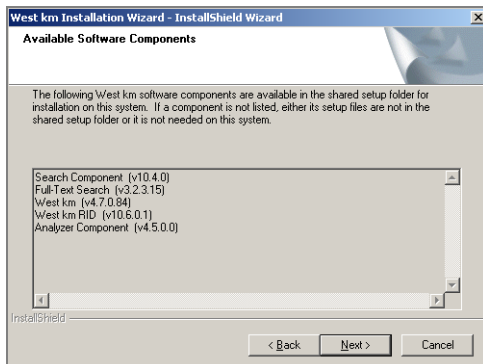


Figure 2-11. West km Installation Wizard, Available Software Components dialog box

3. The version compatibility of the available software components with each other and with components already installed is listed in the Version Compatibility Report dialog box (Figure 2-12 on page 17). The following status indicators are used:

Compatible	The software version is compatible and you can proceed safely.
Undetermined	Software compatibility could not be determined. Make sure the ReleasedSetups.xml file is in your setup location.
Incompatible	The software version is incompatible. Installing incompatible component versions may cause issues with the way West km Express functions, so you must adjust the software installation accordingly before proceeding.

To continue, click **Next**.

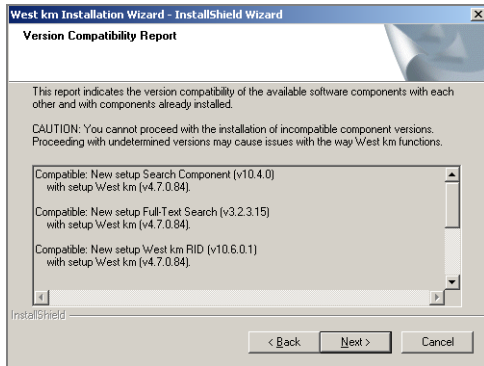


Figure 2-12. West km Installation Wizard, Version Compatibility Report dialog box

- West km software components that will be installed are listed in the Software Components to Be Installed dialog box (Figure 2-13).

If you do not want to install a particular component, clear its check box. However, note that components marked *Required* will be installed even if they're not selected.

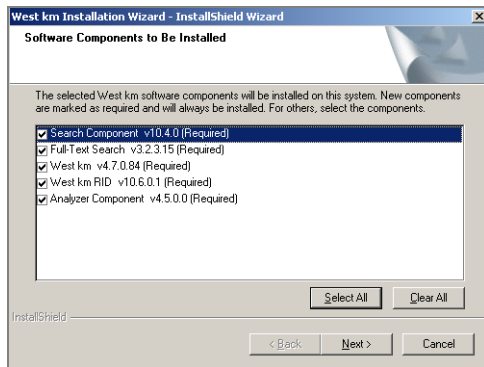


Figure 2-13. West km Installation Wizard, Software Components to Be Installed dialog box

Click **Next** to continue.

- When you continue, the West km Installation Wizard launches the installation programs for the required West km software components. The installation process may take several minutes. The Setup Status dialog box (Figure 2-14) informs you of the progress.

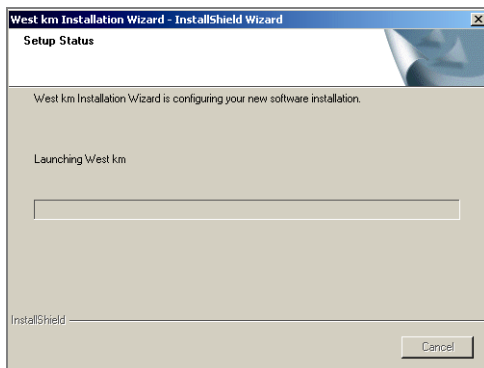


Figure 2-14. West km Installation Wizard, Setup Status dialog box

- Continue through the installation dialog boxes as prompted. When the software component installations are finished, the Complete dialog box for the West km Installation Wizard is displayed (Figure 2-15). Click **Finish**.

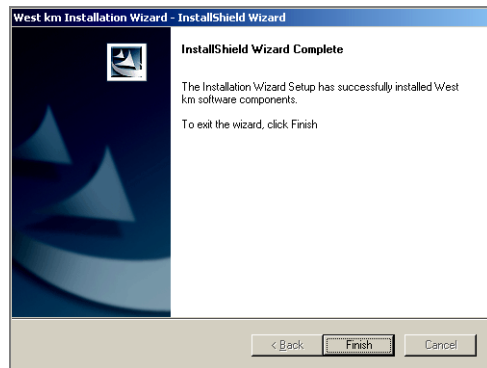


Figure 2-15. West km Installation Wizard, Complete dialog box

To view the results of the installation, which can aid in troubleshooting, access the log files at this location: `[monitor service installation folder]\Thomson\Westkm\Monitor\logs`.

2.2.4 VERIFYING SERVICES ARE STARTED

Several West km services start automatically. Verify that services with an automatic startup type, listed in (Table 2-1), have started.

Table 2-1. West km services

Service	Startup Type
Novus OEM Suds Server	Automatic
West Full Text Searching	Automatic
West km Analyzer Service	Manual
West km Citation Service	Automatic
West km HTML Conversion Service	Automatic
West km Indexing Service	Automatic
West km Monitor Service	Automatic
West km Worker Service	Automatic

To verify that services have started on a server, complete these steps:

- Click the **Start** button, choose **Programs**, choose **Administrative Tools**, and then choose **Services**.
- In the Services window, verify that the *Status* column says *Started* for the West km services on that server.

If you need to manually start a service, right-click the name of the service (e.g., **West km Indexing Service**) in the Services window and choose **Start**.

Note When starting services, start the Novus OEM Suds Server service before the West Full Text Searching service. It is recommended that you do not run the West Full Text Searching service without the Novus OEM Suds Server service.

2.2.5 SETTING UP A DATABASE MAINTENANCE PLAN

To ensure that your West km databases perform at an optimal level, set up routine tasks to maintain your databases. Routine maintenance will not only keep West km data and the database engine performing at satisfactory levels, but also back up data to aid in the occurrence of a disaster.

Your database maintenance plan should include the following tasks:

- Daily: back up and monitor your databases
- Weekly: optimize your databases by checking for database integrity, rebuilding indexes, and updating statistics

For details about the recommended system maintenance guidelines for West km, see “10.2 System Maintenance” on page 118.

2.3 If you are using Microsoft SQL Server Express to house your West km databases, yConfiguring Other Software

2.3.1 ANTIVIRUS SOFTWARE

Due to the design of Microsoft ASP.NET (included with the .NET Framework), antivirus software with real-time monitoring enabled may cause random restarts of the .NET application. This problem occurs because some antivirus applications write information back to the files they scan, causing the application to restart.

To resolve this problem, exclude the following from the antivirus scan list:

- *[West km installation folder]*\Global.asax
- *[West km installation folder]*\Web.config
- *[West km installation folder]*\bin*.*
- %SystemRoot%\Microsoft.NET\Framework\{*.NET version*}\CONFIG\machine.config

For more information about this issue, see the Microsoft knowledge base article 312592.

2.3.2 MICROSOFT INTERNET EXPLORER

Make the following security configuration changes in Internet Explorer on end-user systems that will be used to access West km Express. These changes will add West km Express and Westlaw services to your list of trusted sites.

1. From the Internet Explorer **Tools** menu, choose **Internet Options**.
2. On the **Security** tab, select **Trusted sites** and then click **Sites**.
3. In the Trusted Sites dialog box (Figure 2-16), add these websites to the zone:
 - *.westlaw.com
 - help.westkm.com

- the URL to your West km server, e.g., *http://westkmservername*

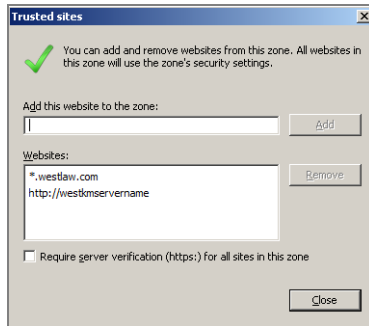


Figure 2-16. Internet Explorer, Trusted Sites

4. On the Security tab, click **Custom Level**.
5. In the Security Settings–Trusted Sites Zone dialog box (Figure 2-17), scroll to the Miscellaneous section. Under *Display Mixed Content*, select **Enable** and click **OK**.

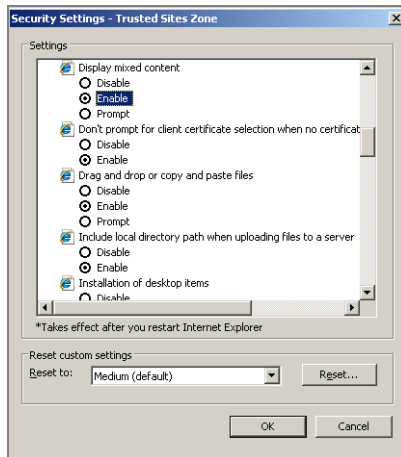


Figure 2-17. Internet Explorer, Security Settings–Trusted Sites Zone

2.4 Viewing Your West km Configuration

After installing West km Express, you can view your West km configuration, including product key, available product components, and the versions of installed software components on the System Configuration page.

To view your system configuration, complete these steps:

1. Open Internet Explorer and go to *hostname/km/plhome.aspx*, where *hostname* is the name of your West km server on your network.

Note A 30–60 second delay may occur the first time you access West km Express after installation while the West km Web application loads into ASP.NET and index sheets are updated.

2. In the West km interface, click the **Setup** link and then choose **System Configuration**. The System Configuration page is displayed (Figure 2-18).

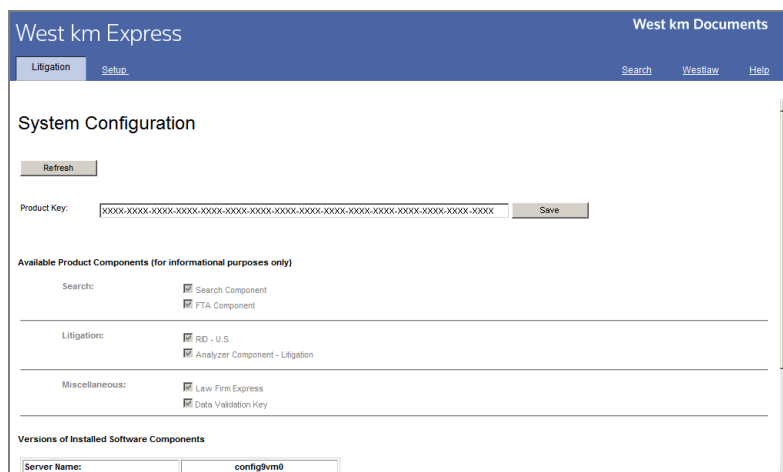


Figure 2-18. System Configuration page

If you later add to your West km package a product component that does not require installation of a software component, the product component can be enabled on the System Configuration page. Type your new product key in the *Product Key* text box and click **Save**.

Note If the added product component requires installation of a software component, then the product key needs to be updated during the software installation process.

2.5 Updating West km Express

In most cases, you can upgrade using the West km Installation Wizard. A hotfix upgrade will install over the top of existing software. Other upgrades (e.g., major release, service pack release) will automatically uninstall and reinstall software.

To upgrade West km software, complete these steps:

1. Consult with your West km representative to ensure that the West km software components you are installing are compatible with each other and with components already installed.
To view the versions of software components that are currently installed, access the System Configuration page. For details, see “2.4 Viewing Your West km Configuration” above.
2. Download the installation suite and extract the setup files to your setup location. For details, see “2.2.1 Copying Setup Files” on page 11. Your West km representative will provide instructions for downloading from the knowledge base.
3. Copy the ServerSetup.xml file to your setup location. The ServerSetup.xml file is located on the West km system in the xml subfolder (e.g., D:\Program Files\Thomson\Westkm\xml).

Your setup location needs to include the following:

- installation folders for the updated software you will install
- the latest West km Installation Wizard files
- the latest ReleasedSetups.xml file
- your ServerSetup.xml file

4. Run the prerequisites.bat file according to the instructions under “2.2.2 Installing Prerequisite Software” on page 12.
5. Run the West km Installation Wizard according to the instructions under “2.2.3 Running the West km Installation Wizard” on page 12.
 - If the information in your ServerSetup.xml file is up-to-date and you are prompted to skip to the end during the installation wizard application, you may do so.
 - If your product key or other setup information has changed, do not skip to the end during the installation wizard application.
 - In the Version Compatibility Report dialog box, carefully review the status indicators to ensure that software components are compatible.
 - In the Software Components to Be Installed dialog box, a software component that you are not upgrading may be listed if the installation folder for it still resides in your setup location. You can clear the component’s check box to prevent reinstallation of the component.

3 Configuring DMS Integration

- 3.1 Configuring eDOCS DM 24
 - 3.1.1 Understanding eDOCS DM Connections 24
 - 3.1.2 Installing the eDOCS DM API 25
 - 3.1.3 Copying West km Forms to the eDOCS DM Server. 25
 - 3.1.4 Setting Up a Security Account 25
- 3.2 Configuring WorkSite (iManage) 29

If your organization is indexing documents that are managed by a DMS, make the following configuration changes as indicated below for your DMS.

- See your DMS section under Setup, System Options, DMS Settings (page 32) to make changes to West km system settings to control communication between your DMS server and West km components.

Note DMS settings are displayed only for the document management systems for which a data source connection is set up. If you do not see the options for your DMS on the System Options, DMS Settings page, first add a data source connection. See “Adding Data Source Connections” on page 55 for details.

- See “Appendix C: Authentication and Document Security Configuration” on page 140 for details about the configuration that is required for West km document security and authentication to function properly with your DMS.

Additional setup steps may also be necessary, depending on your DMS. Refer to the following sections for details.

3.1 Configuring eDOCS DM

3.1.1 UNDERSTANDING EDOCS DM CONNECTIONS

West km will connect to eDOCS DM in one of two ways to index documents: via a database connection or via the eDOCS DM API. Your method determines how you should configure West km and eDOCS DM to communicate.

3.1.1.1 eDOCS DM Database Connection

A database connection is used for eDOCS DM if you meet *any* of these criteria:

- you installed West km 4.7 or later as a new installation, not as an upgrade
- in a previous version of West km, you did not index documents stored in eDOCS DM

If your situation calls for a database connection, skip the configuration steps in this section. To establish a connection to eDOCS DM using a database connection, see “6.2.1 eDOCS DM (Database Connection)” on page 56.

If you are indexing documents stored in eDOCS DM 6.0.x via a database connection, also select the Use DM6.0 Schema option at Setup, System Options, DMS Settings, eDOCS DB.

3.1.1.2 eDOCS DM API Connection

An API connection is used for eDOCS DM if you meet *all* of these criteria:

- you upgraded West km from a version prior to 4.7 and stayed on a 32-bit system
- in the previous version of West km, you indexed documents stored in eDOCS DM
- you want to continue connecting to eDOCS DM via its API

If your situation calls for an API connection, the configuration changes in the following subsections apply:

- 3.1.2 Installing the eDOCS DM API
- 3.1.3 Copying West km Forms to the eDOCS DM Server

If your situation calls for an API connection and you are indexing documents stored in eDOCS DM 5.2.x, 5.3.x, or 6.0.x, the setup changes in this subsection also apply:

- 3.1.4 Setting Up a Security Account

To establish a connection to eDOCS DM using its API after completing the configuration changes in this section, see “6.2.2 eDOCS DM (API Connection)” on page 57.

3.1.2 INSTALLING THE EDOCS DM API

Complete the following steps on the West km server to install the eDOCS DM API and establish a connection to the eDOCS DM server.

1. Close all open applications.
2. Insert the CD-ROM for eDOCS DM into your CD-ROM drive.
3. Click the **Start** button, choose **Run**, type the command **cmd**, and click **OK**.
4. In the command window, type the command **D:**, where *D:* is your CD-ROM drive, and press **Enter**.
5. Type the command **cd dm api** and press **Enter**.
6. Type the command **Setup.exe /standalone** and press **Enter** to start the installation.
7. When prompted, accept all the installation defaults.
8. In the command window, type **exit** and press **Enter**.
9. Click the **Start** button, choose **All Programs**, choose **Hummingbird**, and then choose **Hummingbird DM Connection Wizard**.
10. On the Welcome page, click **Next**.
11. When prompted, enter the eDOCS DM server name and click **Next**.
Note If necessary for your eDOCS DM configuration, first select **Show Fail-Over and Load-Balancing Configuration**.
12. On the Wizard Complete page, click **Finish**.
13. To verify the DM API installation, click the **Start** button, choose **Control Panel**, double-click **Add or Remove Programs**, and then confirm that a listing for **DM API** exists.

3.1.3 COPYING WEST KM FORMS TO THE EDOCS DM SERVER

Copy the following West km form files to the eDOCS DM server where eDOCS DM software is installed.

The files are available at *[West km installation folder]\Fusion Forms*.

Place the files in the DOCSObjects folder (the default location is *[Drive]:\Program Files\Hummingbird\DM Server\DOCSObjects*).

- km_default_client_matter_profile.FRM
- km_default_profile.FRM
- km_filepath.FRM
- km_getquicksearches.FRM
- km_versions.FRM

3.1.4 SETTING UP A SECURITY ACCOUNT

For West km Express to connect to the eDOCS DM server, the IIS account that West km Express is running under needs rights on the eDOCS DM server.

First, verify the following:

- West km Express is installed and working
- eDOCS DM is installed and working
- The eDOCS DM API is installed on the West km server (see “3.1.2 Installing the eDOCS DM API” on page 25)
- You can successfully run the Hummingbird DM Connection Wizard from the West km server and connect to the eDOCS DM server (see “3.1.2 Installing the eDOCS DM API” on page 25)

- You receive an error stating that the system cannot load the DM server interface when you try to add a data source connection for eDOCS DM in West km Express (see “6.2.2 eDOCS DM (API Connection)” on page 57)

Second, if you meet the above criteria, complete the steps in the following subsections. Be sure that you complete the changes using an administrator-level account.

3.1.4.1 Checking the IIS Account for West km Express

By default, the West km Web application is run under the Internet Information Services (IIS) default application pool, DefaultAppPool. And by default, the security account for this application pool is Network Service.

If your configuration uses another account to run the West km Web application, you need to do the following:

- On the West km server, set the password on this account to never expire.
- On the DM server, create the same local account if one does not already exist. Set the password to never expire, and use the same password used for the account on the West km server.
- Set security on the West km folder so that this account has full security access to the entire folder and all subfolders.

If you have IIS 6.0, complete these steps on the West km server to check the security account:

1. Click the **Start** button, choose **Programs**, choose **Administrative Tools**, and then choose **Internet Information Services (IIS) Manager**.
2. In the Internet Information Services (IIS) Manager window, expand the server name in the left frame.
3. Click the **Application Pools** item.
4. In the right frame, right-click **DefaultAppPool** and choose **Properties**.
5. Click the **Identity** tab.

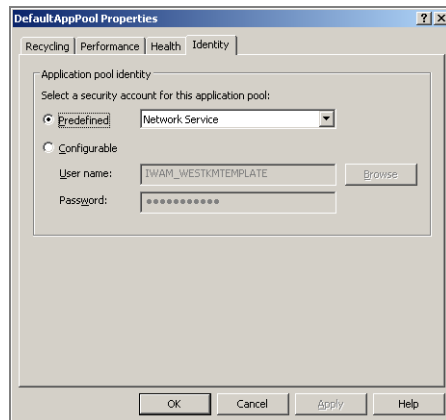


Figure 3-1. DefaultAppPool Security Account: IIS 6.0

If you have IIS 7.5, complete these steps on the West km server to check the security account:

1. Click the **Start** button, choose **Administrative Tools**, and then choose **Internet Information Services (IIS) Manager**. The Internet Information Services (IIS) Manager window is displayed.
2. In the Connections pane, expand the server name in the left frame and click the **Application Pools** item.
3. In the Applications Pools pane, right-click **DefaultAppPool** and choose **Advanced Settings**.

4. Under *Process Model*, locate the **Identity** listing.

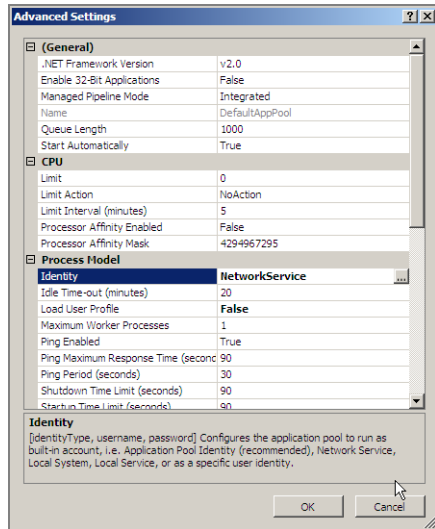


Figure 3-2. DefaultAppPool Security Account: IIS 7.5

3.1.4.2 Adjusting Security on the eDOCS DM Server Using DCOM Config

On the eDOCS DM server, the security account that West km is running under needs access rights via one of these methods:

- the account is a member of a group with administrator rights
- the account is a member of a group with access to the necessary COM objects (see below)
- the account itself has access to the necessary COM objects (see below)

Complete these steps to add rights to the necessary COM objects on the eDOCS DM server:

1. On the eDOCS DM server where eDOCS DM software is installed, click the **Start** button, choose **Run**, type **dcomcnfg**, and click **OK**.
2. In the Component Services window (Figure 3-3), expand the following items in the left frame: **Component Services**, **Computers**, **My Computer**, **DCOM Config**.

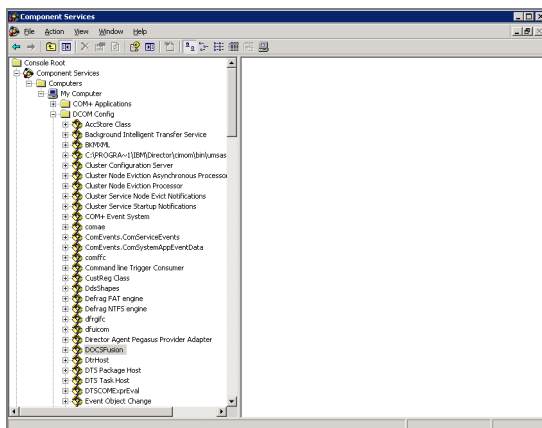


Figure 3-3. Component Services window

3. Under *DCOM Config* in the Component Services window, right-click either the **DOCSFusion** or **Hummingbird DM Server** listing (depending on your DM version) and choose **Properties**.

4. In the DOCSFusion Properties window (Figure 3-4), click the **Security** tab.

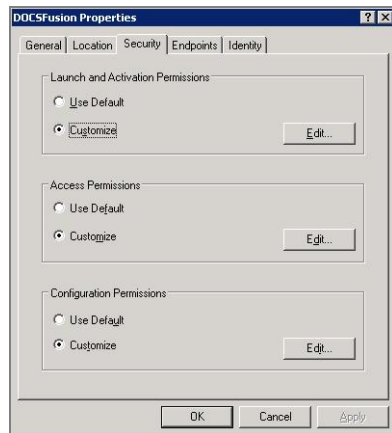


Figure 3-4. DOCSFusion Properties dialog box, Security tab

5. In the *Launch and Activations Permissions* area on the Security tab, complete these steps:
 - a. Select **Customize** and then click **Edit**.
 - b. In the Launch Permission dialog box (Figure 3-5), add these user accounts:

- ANONYMOUS LOGON
- NT AUTHORITY\NETWORK
- NT AUTHORITY\NETWORK SERVICE
- *if Network Service is not running the West km Web application, the account that is*

Give each user account full rights by selecting **Allow** for each permission type.

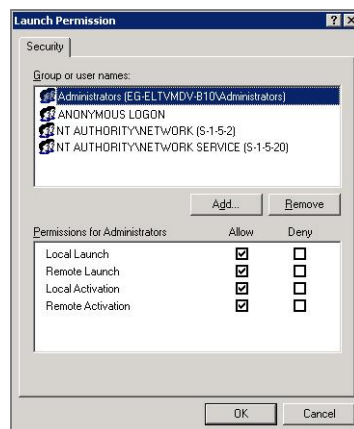


Figure 3-5. Launch Permission dialog box

- c. Click **OK**.
6. Repeat step 5 for the *Access Permissions* area on the Security tab.
7. Repeat step 5 for the *Configuration Permissions* area on the Security tab.
8. In the DOCSFusion Properties window (Figure 3-6), click the **Identity** tab and complete these steps:
 - a. Select **This user**.
 - b. Type the username and password for the user account that was used to install and set up the eDOCS DM server.



Figure 3-6. DOCSFusion Properties dialog box, Identity tab

9. Click **OK**.
10. Repeat steps 3–9 for the **FusionHTTPGenericServer** listing (if available) under DCOM Config in the Component Services window.

3.2 Configuring WorkSite (iManage)

If you are indexing documents stored in WorkSite (iManage), make the following configuration changes. Because the West km server and your WorkSite product are installed on separate machines, you need to register the iManage .dll file on the West km server. This .dll file allows the West km server to communicate with your organization’s DMS server.

1. Locate a computer that has the WorkSite client installed on it. If you have a 64-bit WorkSite server product, access a 64-bit WorkSite client. If you have a 32-bit WorkSite server product, access a 32-bit WorkSite client.
2. On the client computer, find a file named IManage.dll (assuming you have not renamed the file). To find the .dll you can do one of the following:
 - Go to the installation folder for the WorkSite client (e.g., [Drive]:\Program Files\Interwoven\WorkSite). Look for IManage.dll in that folder.
 - Click the **Start** button, choose **Run**, type **regedit**, and then search for IManage.dll. When found, it will show you the location of the .dll.
 - Search the hard drive for IManage.dll.
3. Copy the IManage.dll file to the bin subfolder of the installation folder on the West km server, e.g., [Drive]:\Program Files\Thomson\Westkm\bin.
4. At a command prompt on the West km server, type **regsvr32 [West km installation folder]\bin\imanager.dll** and click **OK**. For example, type **regsvr32 "D:\program files\thomson\westkm\bin\imanager.dll"**.
5. Adjust the value for the *IManage Version* setting at Setup, System Options, DMS Settings, iManage according to your WorkSite client .dll version. (For instructions on setting system options, see “4.1 Setting System Options” on page 32.)

The supported values for this setting are 1.0 and 8.0. If the .dll is numbered in a format of 1.#.#, set the value to 1.0. If the .dll is numbered in a format of 8.#.# or higher, set the value to 8.0.

To determine the WorkSite client .dll version, right-click **IManage.dll**, choose **Properties**, and click the **Version** tab. The .dll version is listed at the top of the dialog box as the “File version.”

- The documents retrieved must be publicly available to West km users.

(e.g., office locations or practice categories)The collection names in the DMSQueryName field are listed for selection on the Add Collection page when you add a document collection in West km. For more information, see "7.1 Adding Document Collections" on page 69. A document collection can also be tied to a library group, which allows your West km members to restrict searches of your internal documents by groupings. For more information, see "8.1.3 Library Groups" on page 164.

4 Setting Options and Properties

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- 4.4 Setting Document Sort Order 45
- 4.5 Changing Property Settings 46
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System option settings and configuration properties determine the configuration of West km Express. West km Express is set up for immediate use, but if you like, you can use the System Options page to set the following types of options:

- DMS Settings (page 32)
- Indexing Settings (page 36)
- Security Settings (page 38)
- Server Configuration Settings (page 39)
- User Interface Display Settings (page 39)

In configuration files, you can set property values that control communication among the various West km components.

4.1 Setting System Options

To access and change system option settings, complete the following steps:

1. Open Internet Explorer and go to *hostname/km/plhome.aspx*, where *hostname* is the name of your West km server on your network.
2. Click the **Setup** link and then choose **System Options**. The System Options page is displayed (Figure 4-1).

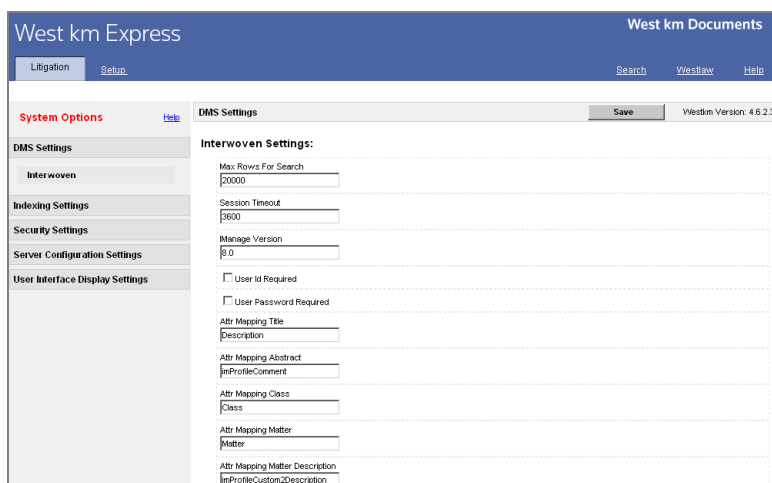


Figure 4-1. System Options page

3. In the *System Options* list in the left frame, click the type of options you want to set.
4. Make the changes you want to the settings in the right frame and click **Save**.

The settings are described in the following subsections.

4.1.1 DMS SETTINGS

DMS settings are displayed only for the document management systems for which a data source connection is set up. If you do not see the options for your DMS on the System Options, DMS Settings page, first add a data source connection. See “Adding Data Source Connections” on page 55 for details.

DMS settings are described in Table 4-1.

Table 4-1. DMS settings

eDOCS API (eDOCS DM)	
Use Individual Logins	<p>If selected, Load Copy uses individual logins (entered in the Professionals page). If not selected, the administrative level account is used.</p> <p>When this option is selected, a DMS UserID column and a DMS Password column is added to the Professionals table, as well as a Server\DB column for the server and database to which the member has access.</p> <p>You may need to select this setting and add and populate these columns in the Professionals table if you use eDOCS DM as your DMS and you want user-based access records to be logged when members load documents from the DMS using the Load Copy feature.</p>
Non DB Run Quick Search Form Name	<p>The name of the form used to run a quick search. This is an external form, not a database form.</p> <p>This setting is ignored if <i>Use DB Forms To Run Quick Searches</i> is not selected.</p>
Get Quick Search Form Name	The name of the form used to retrieve the list of quick searches from the eDOCS DM server.
Get Version Info Form Name	The name of form used to retrieve version information from the eDOCS DM server.
Use Sub Versions	<p>If selected, sub-versions are used for documents.</p> <p>Changing this setting requires re-indexing.</p>
Use DB Forms to Run Quick Searches	<p>If selected, database forms are used to run quick searches.</p> <p>This setting should be selected only if the eDOCS DM server was upgraded or if customized forms are being used.</p>
Default Profile Search Form Name	The name of the form used to retrieve the default profile metadata from the eDOCS DM server.
Use Client Matter Metadata	If selected, client and matter metadata is loaded from the DMS database. If not selected, other client/matter related properties are ignored.
Client Matter Search Form Name	<p>The name of the form used to retrieve client/matter metadata.</p> <p>If the default legal profile is being used, do not modify this setting.</p> <p>If a custom profile is being used, specify a custom external form name.</p> <p>The following properties related to form field names must be unique:</p> <ul style="list-style-type: none"> FusionClientIdFormFieldName FusionMatterIdFormFieldName FusionClientNameFormFieldName FusionMatterNameFormFieldName <p>This setting is ignored if <i>Use Client Matter Metadata</i> is not selected.</p>
Ignore Missing Custom Metadata	<p>For debugging purposes only.</p> <p>Do not select unless debugging.</p>

Table 4-1. DMS settings (continued)

Client ID Form Field Name	<p>The name of the field in the custom form, specified in <i>Client Matter Search Form Name</i>, to use as the client ID.</p> <p>This setting can be optionally set if the client ID is contained in the matter ID.</p> <p>If the default legal profile is being used, do not modify this setting.</p> <p>This setting is ignored if <i>Use Client Matter Metadata</i> is not selected.</p>
Matter ID Form Field Name	<p>The name of the field in the custom form, specified in <i>Client Matter Search Form Name</i>, to use as the matter ID.</p> <p>This setting must be set and may contain the client ID.</p> <p>If the default legal profile is being used, do not modify this setting.</p> <p>This setting is ignored if <i>Use Client Matter Metadata</i> is not selected.</p>
Client Name Form Field Name	<p>The name of the field in the custom form, specified in <i>Client Matter Search Form Name</i>, to use as the client name.</p> <p>If the default legal profile is being used, do not modify this setting.</p> <p>This setting is ignored if <i>Use Client Matter Metadata</i> is not selected.</p>
Matter Name Form Field Name	<p>The name of the field in the custom form, specified in <i>Client Matter Search Form Name</i>, to use as the matter name.</p> <p>If the default legal profile is being used, do not modify this setting.</p> <p>This setting is ignored if <i>Use Client Matter Metadata</i> is not selected.</p>
Security Lump Size	<p>The SQL statement group size parameter used when retrieving security attributes for documents. The recommended range is 75-250.</p>
Security Cache Groups	<p>If selected, group permissions are checked for users on a per-process basis.</p>
Use DM6.0 Schema	<p>If you are indexing documents in eDOCS DM 6.0.x with a database connection, select this option so that West km uses the correct eDOCS DM database schema.</p>
eDOCS DB (eDOCS DM)	
Security Lump Size	<p>SQL statement group size parameter used when retrieving security attributes for documents. The recommended range is 75–250.</p>
Security Cache Groups	<p>If selected, group permissions are checked for users on a per-process basis.</p>
Use Client Matter Metadata	<p>If selected, client matter metadata is loaded from the DMS database.</p>
Use Sub Versions	<p>If selected, sub-versions are used for documents.</p> <p>Changing this setting requires re-indexing.</p>
Use Matter Custom SQL	<p>If selected, the client ID, client name, matter ID, and matter name are retrieved from custom fields instead of the default fields.</p>
Matter Custom SQL	<p>A valid SQL query used to retrieve the client ID, client name, matter ID, and matter name from custom fields.</p> <p>The following aliases must be used:</p> <ul style="list-style-type: none"> client_id client_name matter_id matter_name <p>This setting is ignored if <i>Use Matter Custom sql</i> is not selected.</p>

Table 4-1. DMS settings (continued)

Use Document Type (Class) Custom SQL	If selected, the document type (class) is retrieved from a custom field instead of the default field.
Document Type (Class) Custom SQL	A valid SQL query used to retrieve the document type (class) from a custom field. The custom_class alias must be used. This setting is ignored if <i>Use Document Type (Class) Custom Sql</i> is not selected.
iManage	
Max Rows for Search	The maximum number of records to return for a WorkSite saved search.
Session Timeout	The session time-out value in seconds for the WorkSite connection.
iManage Version	The WorkSite client .dll version. Supported values are 1.0 and 8.0. <ul style="list-style-type: none"> • If the .dll is numbered in a format of 1.#.#, set the value to 1.0. • If the .dll is numbered in a format of 8.#.# or higher, set the value to 8.0.
User ID Required User Password Required	Controls usage of WorkSite virtual user accounts and passwords for authenticating members. You may need to select these options (and populate the columns) if you use WorkSite for your DMS and use virtual logins rather than Windows integrated logins. If selected, WorkSite security will determine document access rights. If not selected, internal security logic is used to determine document access rights. By default, neither value is selected. <ul style="list-style-type: none"> • When <i>User ID Required</i> is selected, a DMS UserID column is added to the Professionals table, as well as a Server\DB column for the server and database to which the member has access. • When <i>User Password Required</i> is selected, a DMS Password column is added to the Professionals table. (If not present already, this will also add a Server\DB column for the server and database to which the member has access.) <p>More than one database may be accessible to one member; in this situation, a drop-down list is displayed in the Server\DB column. When adding or editing a member's information, you need to click the databases in the <i>Server\DB</i> drop-down list to which you want the member to have access and specify the member's DMS login information. The login information will apply to all selected databases.</p> <p>Note To enable these columns for eDOCS DM (API connection), select the <i>Use Individual Logins</i> setting at System Options, DMS Settings, Hummingbird DM.</p>
Attr Mapping Title Attr Mapping Abstract Attr Mapping Class Attr Mapping Matter Attr Mapping Matter Description Attr Mapping Client Attr Mapping Client Description Attr Mapping Author	Indicates how to map WorkSite document profile fields to associated West km fields. A field mapping utility packaged with West km Express can help you determine which WorkSite document profile fields are used for your DMS documents. For instructions on using the utility, see "4.2.1 Field Mapping Utility for WorkSite (iManage)" on page 43.

Table 4-1. DMS settings (continued)

ProLaw	
Author Setting	Determines which author field is used from ProLaw when indexing a document. <i>Adding Professionals</i> will use the name of the person who added the document to ProLaw. <i>Prof Set</i> will use the name of the person set in the ProLaw document metadata field.


4.1.2 INDEXING SETTINGS

Indexing settings are described in Table 4-2.

Table 4-2. Indexing settings

General Settings	
Sync New Docs in Incremental Update	<p>If selected, the incremental update process will also find and index any new documents in the collection that have a date and time prior to when the collection was last indexed.</p> <p>You may want to select this setting if (1) you change your saved search criteria in your DMS database for a document collection after it was indexed, or (2) you add older documents to a NT file system location that is an indexed document collection.</p>
Start and Stop Worker Service	If selected, the indexing service will start and stop the worker service. If not selected, the worker service must be started manually. This setting is selected by default.
Work in Progress Time Span (days)	<p>Prevents documents that are works in progress from being indexed during bulk indexing or incremental updates. A document is a work in progress if the difference between the last modified date and the date of indexing is less than the number of days in this setting.</p> <p>Note If an existing West km document is edited, it is not removed from West km Express during the work-in-progress period. The original document remains until the edited document is incorporated after the work-in-progress period.</p> <p>Note This setting does not apply to document collections in NetDocuments.</p> <p>For a change to this setting to take effect, an incremental update is required. The default value is 0.</p>
Update Search Metadata	<p>If clicked, the system immediately updates the database tables that store and query metadata used during a search. (The tables automatically update at the close of the indexing window; you may want to invoke this process if that update fails.)</p> <p>By default an incremental update is performed, which updates profile data for documents that have changed since the last update. To perform a bulk update, which updates search metadata for all documents, select the Update for All Documents check box before you click Update Search Metadata.</p> <p>Depending on the size of your document collection, the update may take several minutes to complete.</p>
Update Search Form Data	If clicked, the system immediately updates the database tables that store the options available in drop-down lists and look-up controls on the Fields panel. (The tables automatically update at the close of the indexing window.)

Table 4-2. Indexing settings (continued)

Cite Recognition Indexing	
Underline Citations Underline Citations and Descriptions	<p>Determines the portions of a citation that become hypertext links during West km RID processing. These links are displayed in the HTML rendering of indexed documents.</p> <ul style="list-style-type: none">• If <i>Underline Citations</i> is selected, a hypertext link for only the numeric portion of the citation is created.• If <i>Underline Citations and Descriptions</i> is selected, a hypertext link for the title of the citation, as well as the numeric portion of the citation, is created. <p>For a change to this setting to take effect, an incremental update for citation recognition is required.</p>
Update Firm Citing Ref Doc Counts Now	<p>The km citing references icon  is used in your documents to indicate when a citation references other indexed documents at your organization. When there are more than <i>n</i> number of documents (set by the Firm Citing Ref Threshold setting), the icon is displayed.</p> <p>Citing reference counts are updated daily at the end of the indexing time window. Counts are not immediately updated when an administrator manually deletes a document from West km Express.</p> <p>To start updates to the citing reference counts immediately (regardless of the indexing time window), click Update Firm Citing Ref Doc Counts Now.</p>
Full-Text Indexing	
Rebuild Index Now	<p>When clicked, full-text indexing starts immediately for all storage collections. If the full-text indexing scheduling window is not open, indexing starts once the window opens.</p>
Update Collection XML	<p>When this button is clicked, storage collections are created that are used for the HTML renderings of documents.</p>
Document Synchronization	
Sync Docs Now	<p>When clicked, synchronization processes start immediately. If the document sync window is not open, synchronization starts once the window opens.</p>

4.1.3 SECURITY SETTINGS

Security settings are described in Table 4-3.

Table 4-3. Security settings

Document Security Level	
None Always Display Titles Full	<p>Controls the access that active West km members have to indexed documents. The security levels are based on the security implemented in your organization's DMS.</p> <ul style="list-style-type: none">• None: All matching organization documents are listed in West km results, and all active West km members can view and load them. This is the lowest security level and is the default setting.• Always Display Titles: All matching organization documents are listed in West km results, including full profile information, but members can only view and load documents if they have the necessary DMS access rights.• Full: Only documents to which the members have necessary DMS access rights are listed in West km results. This is the highest security setting. <p>The performance you experience in West km Express is inversely proportional to the security level you select. The lowest security level may produce the best performance; the highest security level may negatively affect performance.</p> <p>Note This setting does not apply to document collections in NetDocuments.</p> <p>Note For details about the configuration that is required for West km document security and authentication to function properly with your DMS, see "Appendix C: Authentication and Document Security Configuration" on page 140.</p>
Apply Security to West km Icon	<p>Controls the display of the West km icon in WestlawNext and Westlaw Classic that indicates there are citing documents at your organization.</p> <p>If selected, the West km icon is displayed only after checking that the user has access to at least one document in your organization's document list.</p> <p>If not selected, the West km icon is displayed regardless of the user's access to your organization's document list. The user may be restricted from accessing organization documents, but the icon display informs the user that organization documents containing the citation exist.</p>
Confidentiality Message	<p>An optional warning message detailing privacy concerns that is displayed to members. The message is displayed in a pop-up window when a user views the first organization document in a session.</p> <p>To prevent display of the message box, set the value to "".</p> <p>Space is limited to 1000 characters.</p>
Remote Access	
Username Password	<p>The name and password for a Windows domain user account (or several local user accounts) with access to all NTFS documents that West km Express will access directly for indexing, including NTFS documents and documents managed by eDOCS DM and ProLaw.</p> <p>For more information on name and password limitations, see "2.1.3 Remote Access Account Requirements" on page 10.</p>

4.1.4 SERVER CONFIGURATION SETTINGS

Server configuration settings are described in Table 4-4.

Table 4-4. Server configuration settings

General Settings	
Delivery Host Name	The full server name with the domain of your West km server (e.g., KMSRV.yourcompany.com). If you do not provide the host name, it will be populated with the server name (e.g., KMSRV) during the installation.
Email Replacement Character	When a user e-mails a document from West km Express, a legal character that replaces all illegal characters (i.e., \ / : * ? " > <) in the file name for the document attachment. (The file name is generated from the DMS title of the document, which may include illegal characters.) The default value is a space. The value cannot contain an illegal character.
Hide Email Link	When selected, the Email Document link is removed from the user interface. This setting is not selected by default.
Proxy Settings	
Web Proxy Host	IP address or URL for the proxy server.
Web Proxy Port	The port number used by the proxy server.
Bypass Proxy on Local	If selected, bypasses the proxy server for local addresses.
Server Settings	
Bulk Load Controller Port	Open TCP communications port for the indexing service on the indexing server. The default value is 8085.
Profile Sync Controller Port	Open TCP communications port for full-text indexing on the indexing server. The default value is 8085.

4.1.5 USER INTERFACE DISPLAY SETTINGS

Server configuration settings are described in Table 4-5.

Table 4-5. User interface display settings

General Settings	
Firm Name	The text to display for your organization's name in the WestlawNext and Westlaw Classic interfaces. Space is limited to approximately 20 characters.

Table 4-5. User interface display settings (continued)

Search Process Count	<p>The number of documents to process before displaying results for full-text searches. Accordingly, the Limits feature initially generates the counts and the items you can select for restrictions from the first set of processed documents. In the Limits interface you can process the next set of documents to update the counts and restrictions by clicking Next.</p> <p>The default value is <i>200</i>.</p> <p>Notes about search performance:</p> <ul style="list-style-type: none">• Values above the default (200) may degrade performance.• For best performance, maintain a 1:5 ratio between Search Process Count and Search Max Hits (e.g., 200:1000). If you have a powerful processor, you may want to increase the ratio (e.g., 100:1000).• When the Search Process Count setting is less than the Search Max Hits setting (recommended), results may display before all documents are processed.
Search Max Hits	<p>The maximum number of documents to process for full-text searching. (Searches using the Natural Language search method return a maximum of 100 documents, even if the value is set over 100.)</p> <p>The default value is <i>1000</i>.</p> <p>Note For best performance, maintain a 1:5 ratio between Search Process Count and Search Max Hits (e.g., 200:1000). If you have a powerful processor, you may want to increase the ratio (e.g., 100:1000).</p>
Search Query Timeout	<p>Maximum amount of time in seconds to wait for SQL queries to complete. If the time-out period is exceeded, an exception is generated and the document is not indexed.</p>
Welcome Text	<p>The HTML file that is displayed in the West km interface on the Welcome panel and on WestlawNext as scope information on the West km home page.</p> <p>The default value is <i>/custom/WelcomePage.html</i> (within the West km installation folder).</p> <p>You can change the HTML file to customize the welcome text for your organization. So that your changes are not overridden upon upgrade, use a different file name and change this property value to match.</p>
Welcome Display Label	<p>The text that is used for the following:</p> <ul style="list-style-type: none">• The name of the Welcome panel in the West km interface. If no label is entered, the Welcome panel is not displayed.• The scope information label on the West km home page on WestlawNext. If no label is entered, the scope icon is not displayed. <p>The default value is blank.</p>
West km Help URL	<p>The URL to access the default page for the West km Help system.</p> <p>The default value is <i>http://help.westkm.com</i>.</p>
Enable West km Help	<p>If selected, links are displayed in the interface to access the West km Help system.</p> <p>This setting is selected by default.</p>

Table 4-5. User interface display settings (continued)



Activate West km for Litigation	<p>If selected, the Litigation tab in West km Express is available to all users.</p> <p>If not selected, the Litigation tab is not available to end users (it may be available to administrators).</p> <p>This setting is not selected by default.</p>
West km for Litigation Tab Label	<p>In the West km interface, the name of the tab that is used for searching in West km Express. The default value is <i>Litigation</i>.</p>
Record Usage Records	<p>If selected, enables usage reporting, which can be used for cost recovery purposes.</p>
Prompt for Client ID	<p>If selected, West km members are prompted to enter a client ID when accessing the West km interface. This ID is tracked with West km transactions, providing you with greater control over billing allocation.</p> <p>This setting is not selected by default.</p>
Client Matter Separator	<p>The separator character (i.e., a hyphen “-”) to be used when creating a combined client and matter ID and a combined client and matter name in West km Express.</p> <p>If you change the separator character, you must run an incremental update for profile metadata in order for the change to be reflected in West km searches.</p>
Citing References	
Westlaw Display – First Page Westlaw Display – Other Pages	<p>The number of your organization’s documents to list in a KeyCite result (the first page and other pages) in the Westlaw Classic interface.</p> <p>The default values are <i>200</i> and <i>100</i>.</p>
Display Mouseover Text for Flags	<p>If selected, mouseover text is displayed when pointing to KeyCite status flags within the text of documents in the West km interface, in the WestlawNext and Westlaw Classic interfaces.</p>
Firm Citing Ref Threshold	<p>Determines the number of indexed documents that must reference a citation before a km citing references icon  is displayed after a citation. When there are more than <i>n</i> number of citing documents, the icon is displayed. For example, if the threshold value is <i>1</i>, at least one other document must reference the citation in order for the icon to be displayed.</p>
Show West km Citing Ref Icon	<p>If selected, km citing references icons  are inserted after citations, indicating when a citation is referenced in indexed documents. This setting affects documents displayed in the West km interface and in the WestlawNext and Westlaw Classic interfaces.</p>

Table 4-5. User interface display settings (continued)

Depth Star Settings																
Category Four Category Four Max Category Four Min	Controls depth of treatment categories for citing documents. Modify these settings to change the depth of treatment categories.															
Category Three Category Three Max Category Three Min	KeyCite depth of treatment stars indicate the extent to which each of your organization's documents discusses a Westlaw document. The designation is based on the number of times your organization's document cites the Westlaw document.															
Category Two Category Two Max Category Two Min	The default settings for the depth of treatment categories are as follows:															
	<table border="1"> <thead> <tr> <th>Symbol</th> <th>Default Definition</th> <th>Default Range</th> </tr> </thead> <tbody> <tr> <td>HHHH</td> <td>Examined</td> <td>Your organization's document cites the displayed Westlaw document 10 or more times.</td> </tr> <tr> <td>HHH</td> <td>Discussed</td> <td>Your organization's document cites the displayed Westlaw document 6–9 times.</td> </tr> <tr> <td>HH</td> <td>Cited</td> <td>Your organization's document cites the displayed Westlaw document 2–5 times.</td> </tr> <tr> <td>H</td> <td>Mentioned</td> <td>Your organization's document cites the displayed Westlaw document 1 time.</td> </tr> </tbody> </table>	Symbol	Default Definition	Default Range	HHHH	Examined	Your organization's document cites the displayed Westlaw document 10 or more times.	HHH	Discussed	Your organization's document cites the displayed Westlaw document 6–9 times.	HH	Cited	Your organization's document cites the displayed Westlaw document 2–5 times.	H	Mentioned	Your organization's document cites the displayed Westlaw document 1 time.
Symbol	Default Definition	Default Range														
HHHH	Examined	Your organization's document cites the displayed Westlaw document 10 or more times.														
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HH	Cited	Your organization's document cites the displayed Westlaw document 2–5 times.														
H	Mentioned	Your organization's document cites the displayed Westlaw document 1 time.														
Category One Category One Max Category One Min	Change the caption settings if you want to change the definitions of depth of treatment categories. Change the min and max settings to indicate the range of times your organization's document must cite the Westlaw document in order to belong to a particular depth of treatment category.															
Litigation																
Default Search Template	Determines the search tab that is displayed by default in the West km interface (Search or KeyCite). The default value is <i>Search</i> .															
Expand Fields Panel by Default Expand Welcome Panel by Default	Determines whether panels are expanded or collapsed by default when a West km user session is started. These settings are not selected (the panels are collapsed) by default. Note If <i>Welcome Display Label</i> is not populated, then <i>Expand Welcome Panel by Default</i> is not available.															
Full Text Terms and Connectors Search Result Sort Order Full Text Natural Language Search Result Sort Order	Determines the sort order for West km results from a full-text search using terms and connectors or natural language. (The sort order affects the West km interface and the WestlawNext and Westlaw Classic interfaces.) The default value is <i>Modified Date Time</i> .															
Show Search Terms in Result List	Determines whether the result list shows and highlights search terms. This setting affects result lists in both the West km and WestlawNext and Westlaw Classic interfaces. This setting is selected by default.															

Table 4-5. User interface display settings (continued)

Words before and after Search Terms	<p>When searching full text, indicates the amount of text (in number of words) to show before and after each search term.</p> <p>Note Surrounding text is not displayed beyond the boundaries of a paragraph, a table cell, or text that defines metadata for a title, attorney, law firm, governing law, or party.</p> <p>For this setting to function, <i>Show Search Terms in Result List</i> must be selected.</p> <p>The default value is 20.</p>
Number of Search Term Hits to Show	<p>When searching full text or titles, indicates how many search term references to show.</p> <p>For this setting to function, <i>Show Search Terms in Result List</i> must be selected.</p> <p>The default setting is the first three search terms.</p>
Logos	
Documents Found-Header Logo Documents Found-List Logo Document Identifier Logo Organization Identifier Logo	<p>Logos used to indicate West km information in the product interface. Modify these settings to change the logos, for example, to organization-specific images. For details, see “4.3 Customizing West km Logos” on page 44.</p> <p>To view the image currently designated, click Show Image.</p> <p>The default values are as follows:</p> <ul style="list-style-type: none">• Documents Found-Header Logo: custom/images/firmsplat.gif• Documents Found-List Logo: custom/images/firmdoclistsplat.gif• Document Identifier Logo: custom/images/firmbrandinglogo.gif• Organization Identifier Logo: custom/images/firmmoreinfo.gif
Enable Hyperlink to Intranet Intranet URL	<p>Enables a link from your organization’s identifier logo to your intranet.</p> <p>To enable the link, select Enable Hyperlink to Intranet.</p> <p>To define the link, enter a URL for <i>Intranet URL</i>.</p>

4.2 Mapping Fields

Metadata from your DMS is used in West km Express to help search for and identify documents. Some DMS metadata is mapped to West km fields by default. For a list of field mappings that West km uses by default from your DMS, see “Appendix G: West km–DMS Field Mappings” on page 260.

4.2.1 FIELD MAPPING UTILITY FOR WORKSITE (IMANAGE)

A field mapping utility packaged with West km Express can help you determine which WorkSite document profile fields are used for your DMS documents. The field mapping utility reads a WorkSite document (which you identify by number) and then outputs all the fields for the document.

Note The WorkSite API needs to be installed on the West km server in order for the mapping utility to work. For details, see “3.2 Configuring WorkSite (iManage)” on page 29.

To run the field mapping utility, complete these steps:

1. On the West km server, go to the bin subfolder of the installation folder, e.g., *[Drive]:\Program Files\Thomson\Westkm\bin*.
2. Double-click one of the following files to open the field mapping utility:
 - **IManage1FieldMapping.exe** (WorkSite 7.x and earlier)
 - **IManage8FieldMapping.exe** (WorkSite 8.x and later)

3. In the form that is displayed (Figure 4-2), type the following and click **Go**.
 - **Server:** The name of the WorkSite server
 - **DB:** The name of the WorkSite database containing the document
 - **User:** The username for the WorkSite server login
 - **Password:** The password for the WorkSite server login
 - **DocNum:** A number for a document from which you want to retrieve field names and values

Figure 4-2. Field mapping utility form

4. At the root of the c:\ drive where you ran the utility, open the file **propertieslMan1.txt** or **propertieslMan8.txt**. The text file lists the WorkSite fields and their associated values for the document whose number you entered in step 3. For example, the following line could tell you that the imProfileCustom2Description field is being used for matter name information.

```
attr: imProfileCustom2Description= Smith Matter
```

4.3 Customizing West km Logos

In the product interface, your organization’s documents are identified with West km logos. You can use the product’s default logos, or you can change them so they are unique to your organization. The default logos are saved in the custom\images subfolder of the installation folder on the West km server (e.g., [Drive]:\Program Files\Thomson\Westkm\custom\images).

The logos are listed in Table 4-6.

Table 4-6. West km logos





Logo Setting	Description	Required Dimensions	Default File Name
Documents Found–Header logo 	Westlaw Classic interface: When your organization’s documents cite a Westlaw document, this logo is displayed on the left side of the document header on Westlaw Classic.	65(w) x 43(h) pixels .90(w) x .60(h) inches	firmsplat.gif
Documents Found–List logo 	Westlaw Classic interface: When your organization’s documents cite a Westlaw document, this logo is displayed next to the document listing on Westlaw Classic.	140(w) x 16(h) pixels 1.94(w) x .22(h) inches	firmdoclistsplat.gif

Table 4-6. West km logos (continued)

Logo Setting	Description	Required Dimensions	Default File Name
 Document Identifier logo	Westlaw Classic and West km interfaces: When you display one of your organization's documents on Westlaw Classic or in the West km interface, this logo is displayed on the right side of the document header.	65(w) x 49(h) pixels .90(w) x .68(h) inches	firmbrandinglogo.gif
 Organization Identifier logo	West km interface: This logo is displayed on the top of pages in the West km interface.	350(w) x 30(h) pixels 4.86(w) x .42(h) inches	firmmoreinfo.gif

To change the logos, either (1) replace the existing logos with new .gif files with the same name, or (2) place new .gif or .jpg files (with new names) in the custom\images subfolder and change the settings at Setup, System Options, User Interface Display Settings, Logos to point to the new file names. For details, see "4.1 Setting System Options" on page 32.

The new logos appear in West km immediately.

Note The name of your organization is also displayed on WestlawNext and Westlaw Classic in links to your organization's documents. If you want to change your organization's name, change the Firm Name setting at System Options, User Interface Display Settings, General Settings.

4.4 Setting Document Sort Order

Documents in a result are sorted by default in different ways, depending on

- the method used to retrieve the documents
- the settings chosen on the System Options pages

Table 4-7 shows the sort order.

Table 4-7. Sort order in West km Express

Document Retrieval Method	Document Sort Options	System Options Setting
KeyCite	Depth of treatment	<i>no setting</i>
Search—Terms and Connectors	Reverse chronological (default)	Full Text Terms and Connectors Search Result Sort Order= Modified Date Time
	Ranking based on the occurrence of search terms in documents	Full Text Terms and Connectors Search Result Sort Order= Number of Hits
	Relevance	Full Text Terms and Connectors Search Result Sort Order= Relevancy—Weight

Table 4-7. Sort order in West km Express (continued)

Document Retrieval Method	Document Sort Options	System Options Setting
Search—Natural Language	Reverse chronological (default)	Full Text Natural Language Search Result Sort Order= Modified Date Time
	Relevance	Full Text Natural Language Search Result Sort Order= Relevancy—Weight

The full-text search result sort order settings are located at Setup, System Options, User Interface Display Settings, Litigation. See page 42 also. (For Relevancy—Weight, lower relevance numbers indicate higher relevancy.)

4.5 Changing Property Settings

4.5.1 CONFIGURATION FILES

As listed in Table 4-8, West km has several configuration files whose properties control communication among the various West km components.

You can access and change settings in these configuration files.

Table 4-8. Configuration files

Configuration File	Location and File Name ¹	Associated Service
Analyzer Component	<i>[Analyzer component installation folder]</i> \ Thomson.West.Dexter.Service.exe.config	West km Analyzer Service
Citation Service	<i>[West km installation folder]</i> \bin\ Thomson.Westkm.CitationService.exe.config	West km Citation Service
Full-Text Search	<i>[Full-text search installation folder]</i> \ Thomson.FTSearch.Server.exe.config	West Full Text Searching service
HTML Conversion Service	<i>[West km installation folder]</i> \bin\ Thomson.Westkm.HTMLConversionService.exe .config	West km HTML Conversion Service
IIS	<i>[West km installation folder]</i> \ Web.config	No associated service; refresh the Web page
Indexing Service	<i>[West km installation folder]</i> \bin\ Thomson.Westkm.IndexingService.exe.config	West km Indexing Service
Monitor Service	<i>[West km installation folder]</i> \Monitor\bin Thomson.Westkm.MonitorService.exe.config	West km Monitor Service
Professionals Import Utility	<i>[West km installation folder]</i> \bin\ Thomson.Westkm.ImportUtility.exe.config	No associated service
Shared	<i>[West km installation folder]</i> \bin\ Shared.config	West km Indexing Service; West km Worker Service
Worker Service	<i>[West km installation folder]</i> \bin\ Thomson.Westkm.WorkerService.exe.config	West km Worker Service

1. The default installation folder for the analyzer component is *[Drive]:\Program Files\Thomson\Dexter*.
The default installation folder for West km is *[Drive]:\Program Files\Thomson\Westkm*.
The default installation folder for full-text search is *[Drive]:\Program Files\Thomson\Full Text Service*.

Properties in configuration files include a *lockItem* attribute that determines whether the property value will be replaced during installation and upgrade procedures.

- If you set the *lockItem* attribute for a property to *false* (default), the property value will be replaced during installation and upgrade procedures with the default value for the release being installed.
- If you set the *lockItem* attribute for a property to *true*, the property value will not be replaced during installation and upgrade procedures.

For a description of commonly used properties in each configuration file, see “Configuration File Properties” on page 128.

To open a configuration file and view or change its properties, complete these steps:

1. Open the configuration file you want to view or change in Notepad.
2. Make the necessary adjustments to properties in the configuration file.
3. Save the configuration file.
4. Stop and then start the associated West km service for the configuration file you’ve changed by completing the following steps:
 - a. Click the **Start** button, choose **Programs**, choose **Administrative Tools**, and then choose **Services**.
 - b. Right-click the service and choose **Stop**.
 - c. Right-click the service and choose **Start**.

Note If you’ve made changes to the Web.config file, you do not need to restart a service; just refresh the Web page.

4.5.2 STYLE SHEETS

You can access West km style sheets and change the fonts that appear in the application. The following style sheets are located in the *[West km installation folder]\stylesheets* folder:

- kmstyles.css
- plstyles.css
- StyleSheet.css
- StyleSheetIE6.css

5 Indexing Overview

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Indexing is the process in West km Express that prepares documents for searching and retrieval. It includes the indexing, synchronization, and full-text indexing processes.

5.1 Indexing

Documents are organized into document collections for indexing in West km Express. A document collection is defined by a saved search or query in a document management system or a folder of documents on your file system.

Indexing can run on a document collection in two ways:

- **Bulk indexing:** All documents in the collection are indexed.
- **Incremental update:** Documents in the collection are indexed if they are new or modified and have a date and time after the collection was last indexed. In addition, the update process applies collection characteristic changes (e.g., RID newly enabled) that have been made to a document collection since the last indexing.

Indexing includes the following indexing components, listed in the order in which processing occurs by default:

A. HTML Conversion: Documents that you have designated from your organization's DMS or file system (NTFS) are converted to HTML for use in West km. Stellent Outside In is a third-party software package that is used by West km to convert documents to HTML. (The original documents remain unchanged.)

B. Profile Metadata–DMS: Document metadata originating from your DMS and file system—including created date, last modified date, document title, and author—is collected and saved to the West km database. Select metadata is also stored in .rdf files along with HTML renderings.

C. Cite Recognition (RID): Citations in documents are identified using RID (reference identification) software, and reference IDs are retrieved to link the documents to WestlawNext and Westlaw Classic.

D. Document Analysis: Documents are mined to extract and tag significant content.

The analyzer component extracts and tags content such as title, document type, judges, jurisdiction, and court. Analysis is completed in two phases: (1) documents are analyzed, including identification of litigation document types, and (2) litigation document types are stored in West km Express according to their categories.

With some dependencies, indexing components can be processed separately from each other, giving you flexibility in determining how and when documents are indexed for use in West km Express. However, all indexing components are dependent on the HTML conversion component.

5.1.1 LITIGATION ANALYSIS

During the West km indexing process, the analyzer component extracts and tags significant document content in West km Express, including title, document type, judges, jurisdiction, and court. The analyzer component uses a system of data extraction and textual entity resolution (Dexter) that employs a mixture of the following methods:

- **Rule-based extractors** use deductive rules that are applied to the text word by word. For example, if honorifics such as Honorable, Hon., or Judge are in the document, then the names that follow or precede them are candidates to be extracted as judges.
- **List-based extractors** tag all mention of elements compared to a list. For example, after judge names are extracted using rules, they are then resolved to an authority files. This file has a single entry for each unique individual, as well as further information that may be relevant, such as the judge's jurisdiction and court information.
- **Statistical extractors** use a set of cues that receive weights and whose weights are combined based on probability and statistical concepts. The statistics are derived from training on labeled

text examples. For example, titles are extracted using a statistical model based on formatting, case, position in the document, and length.

5.1.2 SYNCHRONIZATION

Synchronization removes documents from West km Express if they have been deleted from your organization's file system or if they are no longer part of document collections you have defined to be indexed with West km Express.

5.1.3 FULL-TEXT INDEXING

Full-text indexing, provided by the full-text searching service and the search component, builds and updates the indexes that are used to search your organization's documents by terms.

5.2 Supported Document Formats

The supported document formats for indexing documents in West km Express are listed in Table 5-1.

Table 5-1. Supported document formats

Document Format	File Extension
Microsoft Word	.doc or .docx
Corel WordPerfect	.wpd
Adobe Portable Document Format	.pdf
Microsoft PowerPoint for Windows	.ppt
Rich Text Format	.rtf

For information about specific versions of the supported document formats, go to www.westkm.com and click **West km Express** under *Quick Links*. For information regarding support for other formats, call West km Technical Support at 1-888-WESTKM1.

5.2.1 INDEXING AND DISPLAY OF .PDF AND .PPT FILES

The indexing and display of converted .pdf and .ppt files in West km Express depends on the method used to create the original files.

- **Text-based files** include mostly text and are created in PDF from a word-processing document or in Microsoft PowerPoint format with the use of text boxes.
- **OCR-based files** contain a mix of text and images and are created from scanned documents.
- **Image-based files** contain only images and are created from scanned documents.

Only text from the original file (not images) is indexed and searchable in West km Express. For image-based files, only document metadata is indexed and searchable.

An example of a PDF file is shown in Figure 5-1.

Text in the original PDF file. — PROSPECTUS SUPPLEMENT
(To Prospectus dated May 14, 1999) September 24, 1999

An image in the original PDF file. — **BLYTH**
Industries, Inc.
\$150,000,000 7.90% Senior Notes due 2009

Text in the original PDF file. — The Notes will mature on October 1, 2009. Interest on the Notes is payable semiannually on April 1 and October 1, beginning April 1, 2000. The Notes will not be listed on any national securities exchange. Currently, there is no public market for the Notes.

Text in the original PDF file. — Neither the Securities and Exchange Commission nor any state securities commission has approved or disapproved of these securities, or passed upon the adequacy or accuracy of this Prospectus Supplement or the related Prospectus. Any representation to the contrary is a criminal offense.

	Public Offering Price	Underwriting Discounts	Proceeds to Blyth
Per Note	99.083%	0.650%	98.433%
Total	\$148,624,500	\$975,000	\$147,649,500

Figure 5-1. PDF file example

The display of converted .pdf and .ppt files in West km Express also depends on the template that West km Express uses to convert the files to HTML.

- **Text Template:** The default template converts only text, not images, from the original file. When viewing the converted file in West km Express, images are not displayed and formatting may be lost. The text includes citation links and KeyCite status flags as appropriate and is used for document searches.
- **Images Template:** An alternate template converts the original file—both text and images—as a series of images page by page, with the text duplicated between images. The text-only portion includes citation links and KeyCite status flags as appropriate and is used for document searches. Using this template creates very large files, so it is recommended only if your files contain images, formatting, or tabular information that must be preserved “as is” for display in West km Express.

Note You designate the conversion template for .pdf and .ppt files using the `HtmlConversionTemplate` property in `Shared.config`. For more information about setting configuration file properties, see see “4.5 Changing Property Settings” on page 46.

An example of a PDF file converted using the text template is shown in Figure 5-2.

A notice about the conversion is displayed at the top of the converted document.

Text from the original PDF is converted and displayed. Images are not converted, and formatting may be lost. This text is searchable.

Notice: You are viewing a text conversion of a document in Portable Document Format (PDF). As a result, some or all formatting and images may not be displayed. To view the original PDF document, click [Load Copy](#).

PROSPECTUS SUPPLEMENT (To Prospectus dated May 14, 1999)
September 24, 1999
\$150,000,000 7.90% Senior Notes due 2009

The Notes will mature on October 1, 2009. Interest on the Notes is payable semiannually on April 1 and October 1, beginning April 1, 2000. The Notes will not be listed on any national securities exchange. Currently, there is no public market for the Notes.

Neither the Securities and Exchange Commission nor any state securities commission has approved or disapproved of these securities, or passed upon the adequacy or accuracy of this Prospectus Supplement or the related Prospectus. Any representation to the contrary is a criminal offense.

Public Offering Underwriting Price Discounts Proceeds to Blyth

Per Note 99.083% 0.650% 98.433%

Total \$148,624,500 \$975,000 \$147,649,500

Interest on the Notes will accrue from September 29, 1999 to the date of delivery.

The Underwriters are offering the Notes subject to various conditions. The Underwriters expect to deliver the Notes, in book-entry form only, to purchasers through The Depository Trust Company on or about September 29, 1999.

Joint Lead Managers
**Warburg Dillon Read LLC Donaldson, Lufkin & Jenrette
Banc of America Securities LLC**

ABOUT THIS PROSPECTUS SUPPLEMENT

This document is in two parts. The first part is this Prospectus Supplement, which describes the specific terms of the Notes we are offering. The second part, the Prospectus, gives more general information, some of which may not apply to the Notes. If the description of the Notes varies between this Prospectus Supplement and the accompanying Prospectus, you should rely on the information in this Prospectus Supplement.

This Prospectus Supplement contains certain information about Blyth Industries, Inc. (which may be referred to in this Prospectus Supplement as "Blyth", the "Company", "we", "us" or "our"). It does not contain all the information that may be important to you. Before you decide to invest in any Notes, you should read the information and financial data contained in this Prospectus Supplement as well as the more detailed information and financial data that is contained in the accompanying Prospectus, and in the documents and financial statements that we have incorporated by reference in the accompanying Prospectus.

S-2

Figure 5-2. PDF file conversion example using the text template

An example of a PDF file converted using the images template is shown in Figure 5-3.

Text from the original PDF is converted and displayed page by page between converted images. This text is searchable.

Text and images from the original PDF are converted page by page into a series of images. These images are not searchable.

Page Text Repeated with Citation Links and KeyCite Flags:

PROSPECTUS SUPPLEMENT (To Prospectus dated May 14, 1999)
September 24, 1999
\$150,000,000 7.90% Senior Notes due 2009

The Notes will mature on October 1, 2009. Interest on the Notes is payable semiannually on April 1 and October 1, beginning April 1, 2000. The Notes will not be listed on any national securities exchange. Currently, there is no public market for the Notes.

Neither the Securities and Exchange Commission nor any state securities commission has approved or disapproved of these securities, or passed upon the adequacy or accuracy of this Prospectus Supplement or the related Prospectus. Any representation to the contrary is a criminal offense.

Public Offering Underwriting Price Discounts Proceeds to Blyth

Per Note 99.083% 0.650% 98.433%

Total \$148,624,500 \$975,000 \$147,649,500

Interest on the Notes will accrue from September 29, 1999 to the date of delivery.

The Underwriters are offering the Notes subject to various conditions. The Underwriters expect to deliver the Notes, in book-entry form only, to purchasers through The Depository Trust Company on or about September 29, 1999.

Joint Lead Managers
**Warburg Dillon Read LLC Donaldson, Lufkin & Jenrette
Banc of America Securities LLC**

PROSPECTUS SUPPLEMENT
(To Prospectus dated May 14, 1999) September 24, 1999

BLYTH
Industries, Inc.
\$150,000,000 7.90% Senior Notes due 2009

Figure 5-3. PDF file conversion example using the images template

5.3 DMS Integration

West km supports the DMS applications listed in Table 5-2. (For specific versions, go to www.westkm.com and click **West km Express** under *Quick Links*.) The table also provides the method by which West km Express integrates with each DMS to access documents during indexing and for the Load Copy function.

Table 5-2. Supported DMS applications

DMS	Integration Method for Accessing Documents
WorkSite (iManage)	West km uses the WorkSite API to access documents. West km directly accesses the WorkSite database to verify document security rights ¹ .
eDOCS DM (database connection) ²	West km directly accesses the SQL Server database for eDOCS DM. A West km domain user account or a Novell account on a Novell server is used to access the documents in NTFS.
eDOCS DM (API connection) ²	West km uses the eDOCS DM API to access documents. If the API indicates a document doesn't exist (e.g., if the server is down), a West km domain user account or a Novell account on a Novell server is used to verify the existence of the document in NTFS. If it exists, West km will try to process it again later.
ProLaw	West km directly accesses the ProLaw database. A West km domain user account is used to access documents in NTFS.
NTFS	A West km domain user account is used to directly access documents.

1. If you prefer to use the WorkSite API to check document security, change the value of the `IManageSecurityViaApi` property in `Web.config` to `y`. For more information about setting properties in configuration files, see "4.5 Changing Property Settings" on page 46.

2. For help determining your connection method to eDOCS DM, see "3.1.1 Understanding eDOCS DM Connections" on page 54.

6 Configuring Indexing

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To configure West km Express for indexing, you must add connections to the data sources that contain the document collections you want to index.

In addition, several options are available for configuring how, when, and which documents are indexed. You may want to change these settings either before or after you index documents for the first time. For example, you can perform these tasks:

- Change the setup of your indexing server, such as the timing of indexing and the processing of indexing components (see page 62).
- Follow best practices for setting up major indexing or routine indexing updates (see page 65).
- Set system options related to indexing (see “4.1.2 Indexing Settings” on page 36).

6.1 What You Need

In preparing West km Express to index your organization’s documents, you need the following:

- Document collections identifiable for indexing in NTFS folders or in saved searches in DMS databases.
- A user ID and password for an account that has the necessary read-only rights to access your organization’s DMS and the documents you are going to index.
- If your organization uses Novell network software, the user ID and password for the Novell server login and the name of the Novell IP address of the Novell server.
- A decision on when and how often to update West km indexes and full-text indexes after the initial indexing of documents.

6.2 Adding Data Source Connections

Before you can index documents in West km Express, you must add connections to the data sources that contain the document collections you want to index. You must create these connections whether you have documents defined by a saved search in a document management system or a folder of documents on your file system.

To add data source connections, complete these steps:

1. Open Internet Explorer and go to *hostname/km/plhome.aspx*, where *hostname* is the name of your West km server on your network.
2. Click the **Setup** link and then choose **Data Source Management**. The Data Source Management page is displayed (Figure 6-1).

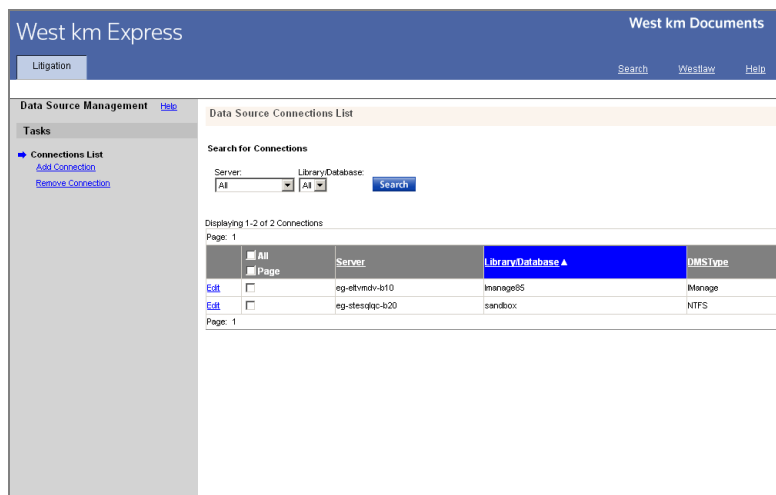


Figure 6-1. Data Source Management page

- In the *Tasks* list, click **Add Connection**. The Add/Edit Connection page is displayed (Figure 6-2).

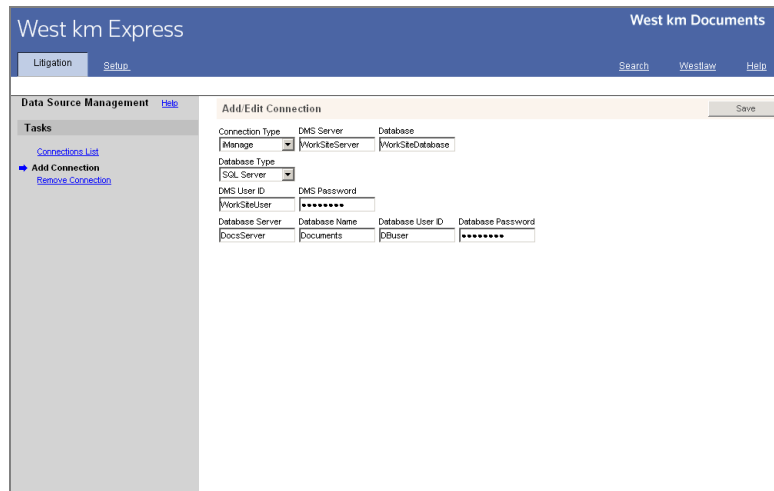


Figure 6-2. Add/Edit Connection page

- From the *Connection Type* list, select the source of the documents.
- Enter the requested information for the source. For a description of the information you need to provide, see these subsections:
 - If you use eDOCS DM (database connection), see section 6.2.1 on page 56.
 - If you use eDOCS DM (API connection), see section 6.2.2 on page 57.
 - If you use WorkSite (iManage), see section 6.2.3 on page 58.
 - If you use the NT file system, see section 6.2.4 on page 59.
 - If you use ProLaw, see section 6.2.5 on page 60.
- Click **Save**.
- Repeat steps 3–5 for each data source that contains document collections you want to index.

To return to the listing of data source connections on the Data Source Management page, click **Connections List**.

6.2.1 EDOCS DM (DATABASE CONNECTION)

Provide the information listed in Table 6-1 when adding a data source connection for eDOCS DM (database connection).

Note For help determining your connection method to eDOCS DM, see “3.1.1 Understanding eDOCS DM Connections” on page 24.

Table 6-1. Data source connection information for eDOCS DM (database connection)

Field Name	Description
Connection Type	The data source used to manage the documents (i.e., eDocs DB).
Server	The name of the server where the database for eDOCS DM is located. (The server name must use only alphanumeric characters; underscores are not allowed.)
Library	The name of the database or library containing the documents you want to index.

Table 6-1. Data source connection information for eDOCS DM (database connection)

Field Name	Description
Use Windows authentication for database	If your organization uses SQL Server for the database used with eDOCS DM, a database account is used by default to access the DOCS database and the documents are you going to index. If you want to use a Windows account instead, select this option and contact your West km representative for more information.
Database User ID and Database Password	When using database account credentials to access the database for eDOCS DM, the user ID and password for the database user account.
Novell ID and Novell Password	If your organization uses Novell network software, the user ID and password for the Novell server on which documents are stored.
Novell IP	If your organization uses Novell network software, the Novell NDS Server IP address.
Use Novell Credentials for Security	If your organization (1) uses Novell network software, (2) uses either the Full or Always Display Titles document security level in West km Express, and (3) has user accounts in your DMS mapped to Novell accounts, then select this option. With this option selected, you must also populate the Novell Network ID field for active members in the Professionals table. For details, see “Using the Professionals Page” on page 86.

6.2.2 EDOCS DM (API CONNECTION)

Provide the information listed in Table 6-2 when adding a data source connection for eDOCS DM (API connection).

Note For help determining your connection method to eDOCS DM, see “3.1.1 Understanding eDOCS DM Connections” on page 24.

Table 6-2. Data source connection information for eDOCS DM (API connection)

Field Name	Description
Connection Type	The data source used to manage the documents (i.e., eDocs API).
DMS Server	The name of the server where eDOCS DM is located. (The server name must use only alphanumeric characters; underscores are not allowed.)
Library	The name of the database or library containing the documents you want to index.
DMS User ID and DMS Password	In the <i>DMS User ID</i> text box, type the name of the eDOCS DM administrator account whose primary group is docs_supervisors. In the <i>DMS Password</i> text box, type the network password of the domain account tied to the eDOCS DM administrator account. The eDOCS DM administrator account must have the correct security settings to run all the eDOCS DM saved searches to be used with West km Express.
Database Server	The name of the server where the database that is used with eDOCS DM is located.
Database Name	The name of the database for eDOCS DM.
Database User ID and Database Password	The user ID and password for a database user account with access to the database for eDOCS DM.
Novell ID and Novell Password	If your organization uses Novell network software, the user ID and password for the Novell server on which documents are stored.
Novell IP	If your organization uses Novell network software, the Novell NDS Server IP address.

Table 6-2. Data source connection information for eDOCS DM (API connection)

Field Name	Description
Use Novell Credentials for Security	If your organization (1) uses Novell network software, (2) uses either the Full or Always Display Titles document security level in West km Express, and (3) has user accounts in your DMS mapped to Novell accounts, then select this option. With this option selected, you must also populate the Novell Network ID field for active members in the Professionals table. For details, see “Using the Professionals Page” on page 86.
Remote Libraries	Used to identify remote libraries so West km Express can communicate with them (see below for more information).

If you have remote libraries set up in eDOCS DM for the main library you entered, West km Express can communicate with those remote libraries. To identify the remote libraries in West km Express, complete these steps for each remote library of the main library:

1. Click the **Add** button next to the Remote Libraries list.
2. In the Remote Library dialog box (Figure 6-3), type the name of the remote library and click **OK**.

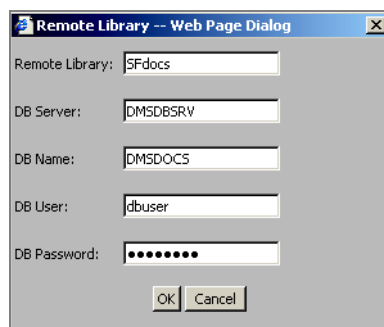


Figure 6-3. Remote Library dialog box

Note Make sure you type the name of the remote library correctly, because West km Express does not validate it.

If you want to edit a remote library, select the library name in the *Remote Libraries* list and click **Edit**. To delete a remote library, select the library name and click **Delete**. (If you are editing the data source connection, you must also click **Save** after either of these actions. If you are adding the data source connection, you are instructed to save in step 11.)

Saved searches located in the main library and in identified remote libraries will be available for selection on the Indexing Options page when you add document collections (see “7.1 Adding Document Collections” on page 69). To help you identify the saved searches, they are prefaced by the library name and a colon, for example, *SFdocs:Tax*.

When a document collection is indexed, saved searches will run across the main library and the remote libraries you’ve identified for it, regardless of the library in which the saved search is located.

6.2.3 WORKSITE (IMANAGE)

Before adding data source connections for WorkSite, note the following West km requirements:

- WorkSite saved searches that are used to identify documents in West km Express should be restricted to only the database on which the search exists. For example, if search folder *Search1* exists on database *DB1*, then the search database specified should be *DB1* and only *DB1*. Specifying any database other than *DB1* may lead to duplicate documents being indexed by West km and may slow down the indexing process.

- WorkSite saved searches must be saved under My Folders or Other Folders in WorkSite Explorer. Saved searches that are saved outside of WorkSite Explorer (e.g., My Matters) or in subfolders will not appear in West km.
- West km Express does not process searches in WorkSite workspaces (a new feature in WorkSite 8.0).
- It is recommended that sub-searches (a new feature in WorkSite 8.0) not be used with West km Express, because duplicate documents that are retrieved by both the main search and the sub-search will cause errors during indexing.
- Only one version of WorkSite can work with West km Express at one time. West km Express will not function correctly if you have document collections from more than one version.

Provide the information listed in Table 6-3 when adding a data source connection for WorkSite.

Table 6-3. Data source connection information for WorkSite (iManage)

Field Name	Description
Connection Type	The data source used to manage the documents (i.e., iManage).
DMS Server	The name of the server where WorkSite is located. (The server name must use only alphanumeric characters; underscores are not allowed.)
Database	The name of the database or library containing the documents you want to index.
Database Type	The type of database that is used with WorkSite.
DMS User ID and DMS Password	The user ID and password for the WorkSite server login.
Database Server	If your organization uses Microsoft SQL Server for the WorkSite database, the name of the server where the database is located.
Database Name	For Microsoft SQL Server, the name of the database for WorkSite.
Database User ID and Database Password	For Microsoft SQL Server, the user ID and password of a user account with access to the database for WorkSite.
Use UNC Path to Get Document Copy	When this option is cleared (the default), West km uses the WorkSite API to access documents. When this option is selected, West km uses the UNC path to access documents. Select this option if the HTML Conversion indexing component fails when processing by component. When this option is selected, West km uses the remote access account configured on the West km system to access documents; the user account requires read and execute permissions to the WorkSite file server where the documents reside.

6.2.4 NT FILE SYSTEM

Provide the information listed in Table 6-4 when adding a data source connection for the NT file system.

Table 6-4. Data source connection information for NTFS

Field Name	Description
Connection Type	The data source used to manage the documents (i.e., NTFS).
Server	The name of the server containing the documents you want to index. (The server name must use only alphanumeric characters; underscores are not allowed.)
Share	The shared location used to store documents on the server. For example, if the server and share is \\pheasant\documents, then type documents .

Table 6-4. Data source connection information for NTFS

Field Name	Description
Novell ID and Novell Password	If your organization uses Novell network software, the user ID and password for the Novell server on which documents are stored.
Novell IP	If your organization uses Novell network software, the Novell NDS Server IP address.

6.2.5 PROLAW

Provide the information listed in Table 6-5 when adding a data source connection for ProLaw.

Table 6-5. Data source connection information for ProLaw

Field Name	Description
Connection Type	The data source used to manage the documents (i.e., ProLaw).
Server	The name of the server where the database for ProLaw is located. (The server name must use only alphanumeric characters; underscores are not allowed.)
Database	The name of the database or library containing the documents you want to index.
Database Type	The type of database that is used with ProLaw.
Use Windows authentication for database	If your organization uses SQL Server for the database used with ProLaw, a database account is used by default to access the ProLaw database and the documents are you going to index. If you want to use a Windows account instead, select this option and contact your West km representative for more information.
ProLaw XII (or above)	If your organization uses ProLaw XII or later, select this option.
Database User ID and Database Password	When using database account credentials to access the database for ProLaw, the user ID and password for the database user account.
Novell ID and Novell Password	If your organization uses Novell network software, the user ID and password for the Novell server on which documents are stored.
Novell IP	If your organization uses Novell network software, the Novell NDS Server IP address.

After you have saved the ProLaw data source connection, you can edit or add document collections for this database. (You also have this option when you add document collections to West km. For details, see “7.1 Adding Document Collections” on page 69.)

To edit or add document collections, complete these steps:

1. Click the **Add Collection** button next to the Available Collections list (see Figure 6-4). Or to edit a collection you've already defined, select the collection in the *Available Collections* list and click **Edit Collection**.

General Information:

Server: Database:

Available Collections:

- Banking Finan
- Corporate
- Regulatory
- Tax

Include documents within subfolders

Collection Name:

Collection Description:

Figure 6-4. Adding a ProLaw connection

2. In the Document Collection dialog box (Figure 6-5), type a collection name and fill in any ProLaw criteria you want used to select documents for inclusion in this collection. If you don't indicate any criteria, all documents in the database will be included.

Collection Name:

Created beginning date: Created ending date: Event type:

Matter ID: Client sort: Event class:

Created by initials: Created by office: Event notes:

Event Kind: Adding Date: Is Publish:

Pleading Index No Sort: Pleading Status:

Figure 6-5. Document Collection dialog box for ProLaw

3. Click **Save**.

6.3 Changing Data Source Connections

6.3.1 SEARCHING FOR DATA SOURCE CONNECTIONS

To search for a data source connection, choose a server name and a library/database name (if desired) from the drop-down lists at the top of the Data Source Management page and click **Search**. The connections matching your selections are listed. (To display all data source connections, choose **All** from both drop-down lists and click **Search**.)

6.3.2 EDITING DATA SOURCE CONNECTIONS

To edit a data source connection, click **Edit** next to the server and library/database you want to edit on the Data Source Management page. Then edit the values and click **Save**. If you cannot click in a text box or select a value, the field cannot be edited.

6.3.3 REMOVING DATA SOURCE CONNECTIONS

You can permanently remove data source connections. Note the following:

- When you remove a data source connection, any associated document collections are also removed. The system automatically schedules synchronization to run when the next synchronization window opens, at which point the documents are removed.
- If you wish to avoid re-indexing of documents, it is recommended that you seek assistance from your West km representative before removing data source connections.

To permanently remove one or more data source connections, complete these steps:

1. On the Data Source Management page, select the check box to the left of each connection that you want to remove.
2. In the *Tasks* list, click **Remove Connection**.
3. At the warning message, click **OK**.

6.4 Setting Up the Indexing Server

You can define indexing service windows and indicate how indexing components should be processed.

To set up the indexing server, click the **Setup** link and then choose **Indexing Server Setup**. The Indexing Server Setup page is displayed (Figure 6-6).

The screenshot displays the 'Indexing Server Setup' page in the West km Express interface. The page is titled 'Indexing Server Information' and contains the following details:

- Server Name:** IDXSRV
- Temp Directory:** E:\Program Files\Thomson\Workspace\temp (with an **Edit** link)
- Primary Server:** Yes

Below this information is a table for 'Indexing Components':

Component Name	Suspend	Process by Component	Processing Order
HTML Conversion	<input type="checkbox"/>	<input type="checkbox"/>	1
Profile Metadata	<input type="checkbox"/>	<input type="checkbox"/>	2
Cite Recognition	<input type="checkbox"/>	<input type="checkbox"/>	3
Litigation Analysis	<input type="checkbox"/>	<input type="checkbox"/>	4

At the bottom, there is a 'Service Windows' section with a table:

Service Name	Collections	Frequency	Start Time	End Time	Edit	Delete
Document Indexing Window	All (Edit)	Daily	12:00:00 AM	11:59:59 PM	Edit	Delete
Document Sync Window	All	Daily	12:00:00 AM	11:59:59 PM	Edit	Delete

Buttons for 'Add Window', 'Show Advanced', and 'HTML Storage' are located below the table.

Figure 6-6. Indexing server setup page

6.4.1 INDEXING SERVICE WINDOWS

Indexing service windows define the time period during which indexing processes can occur. Upon installation, West km Express is set up to index documents according to system default settings, but you may want to change these settings either before or after you index documents for the first time.

The available indexing service windows and what they do are described in Table 6-6.

Table 6-6. Description of indexing service windows

Service Window	Description
Document Indexing Window	The time window during which indexing can run. By default, no window is defined.
Document Scheduling Window	The time window during which document collections can be automatically scheduled for incremental indexing updates. By default, a 24-hour window is defined. (Note that automatic scheduling occurs only when both the document scheduling window and the document indexing window are open.)
Document Sync Window	The time window during which synchronization can be automatically scheduled and can run. By default, no window is defined.
Purge Window	The time window during which indexing job information that's no longer needed can be cleaned up.

Note These windows do not define time windows for full-text indexing. For more information about scheduling full-text indexing, see "7.5 Full-Text Indexing" on page 78.

For more information about

- recommended scheduling of indexing processes, see "6.5 Setting Up Indexing Processes" on page 65.
- indexing processes, see "7.3 Indexing Document Collections" on page 75.
- synchronization processes, see "7.4 Synchronizing Document Collections" on page 77.

6.4.1.1 Adding Indexing Service Windows

To add an indexing service window, complete these steps:

1. At the Indexing Server Setup page, click **Add Window** in the *Service Windows* section in the right frame.
2. Select the indexing service for which you'd like to define a window.
3. If you are setting up a document indexing window and you want the window to apply only to specific data sources or document collections, click the **Edit** button in the *Collections* column. In the Select DMS & Collections dialog box, select the sources or collections you want and click **OK**.

If no selections are made for a window, the window applies to all sources or collections and is referred to as an "All" window.

For more information about using this feature, see the following subsection, "6.4.1.2 Using Multiple Indexing Service Windows."

4. Choose the frequency for the window. Weekdays refer to Monday through Friday. Weekends refer to Saturday and Sunday.
5. Type the start time and the end time for the window. A window's start time always occurs on the day specified in the *Frequency* column. The end time may occur the day afterward, depending on whether the start time is set before or after the end time.

Note A 24-hour open window has both a start time and end time of 12:00:00 AM.

6. Click **Update**.

To edit an indexing service window, click **Edit** next to the listing, make your changes, and click **Update**.

To edit the DMS connections or document collections that are selected for an indexing service window, click **Edit** in the *Collections* column, make your changes, and click **OK**.

To delete an indexing service window, click **Delete** next to the listing.

To view all indexing service windows, including the document scheduling window and purge window, click **Show Advanced** at the bottom of the listings.

To access the HTML Storage, Details and Indexing page, from which you can schedule full-text indexing, click HTML Storage at the bottom of the listing. For details, see “7.5.1 Scheduling Full-Text Indexing” on page 79.

6.4.1.2 Using Multiple Indexing Service Windows

You may want to set up multiple document indexing windows in these situations:

- You want to control indexing for DMS servers in different time zones. Set up as many windows as you need for the different servers and time zones. When you enter the start and end times for a window, convert times to the time zone of the indexing server. Then select the applicable data sources for each window.
- You want windows to apply only to specific data sources or document collections. For example, if you want document collections to be updated at different times, then define as many document indexing windows as you need for the different times. Then select the sources/collections you want for each.
- You want processes to run during different times on weekdays and weekends. For example, if you want indexing to run at one time on weekdays and another time on weekends, define two document indexing windows. Choose a frequency of **Weekdays** for one window and **Weekends** for the other.

6.4.1.3 Understanding Indexing Service Windows

Selecting Collections

- When you add a data source connection or document collection (see “7.1 Adding Document Collections” on page 69), it is automatically added to “All” document indexing windows.
- When you add a data source connection or document collection and there is no “All” window, you must manually select the connection/collection in a document indexing window for indexing to occur. This is true for a collection even if the corresponding data source is already selected.

Automatic Scheduling of Indexing

The following items are required for automatic scheduling of indexing to occur for a document collection:

- Both a document scheduling window and a document indexing window are open
- The document collection is selected in a document indexing window (or you have an “All” window)

The oldest available jobs are scheduled first.

Processing at the Close of Windows

- If processing isn’t finished when a window closes, the indexing service windows perform as indicated in Table 6-7.

Table 6-7. Processing behavior when indexing service windows close

Service Window	Processing Behavior When Window Closes
Document Indexing Window	Processing continues until delegated documents are finished. No additional documents are delegated from the queue.
Document Sync Window	Processing continues beyond the close of the window until synchronization is finished.

6.4.2 INDEXING COMPONENTS

By default, West km Express is set up so that it processes a subset of documents through all the indexing components before it moves to the next subset of documents.

You can change processing options in the *Indexing Components* section.

- **Suspend:** If you select *Suspend* for an indexing component, processing for the component is suspended for all document collections during indexing, regardless of the settings for the individual document collections. (If you select this option, it will stay selected until you clear it.)
If not selected (the default), processing for the component proceeds during indexing according to the settings for the individual document collections.
- **Process by Component:** If you select *Process by Component* for an indexing component, processing for the component will continue until no more documents are available to be indexed before moving on to process the next component. (If you select this option, it will stay selected until you clear it.)
If not selected (the default), a subset of documents to be indexed is processed by all the indexing components (according to the settings for the document collection) before moving on to the next subset of documents. The number of documents in the subset is determined by the thread count. By default, 10 threads are used, with a maximum of 10 documents processed per thread.

6.5 Setting Up Indexing Processes

When you are indexing documents in West km Express, the guidelines in this section will help you understand how to

- perform indexing updates for a significant number of new, updated, or removed documents (see the following subsection, “6.5.1 Major Indexing”)
- schedule routine indexing updates after you’ve indexed your document collections for the first time (see “6.5.2 Routine Indexing Maintenance” on page 66)

6.5.1 MAJOR INDEXING

Follow the guidelines in this section for indexing updates that involve major changes to document collections, such as significant numbers of new, updated, or removed documents.

1. Set aside a large block of time, such as a weekend, when end users are not accessing West km.
2. At the Indexing Server Setup page, delete the following windows to prevent indexing processes from occurring automatically:
 - document scheduling windows
 - document sync windows(For details, see “6.4.1.1 Adding Indexing Service Windows” on page 63.)
3. Remove full-text indexing scheduling windows to turn off full-text indexing. (For details, see “7.5.1 Scheduling Full-Text Indexing” on page 79.)
4. Define a document indexing window at the Indexing Server Setup page for all document collections. Make it a 24-hour open window.

Service	Start and End Time
Document Indexing Window	12:00:00 AM–12:00:00 AM

5. Consider using the Suspend and Process by Component options at the Indexing Server Setup page to control how and when indexing components are processed (for details, see “6.4.2 Indexing Components” on page 65).

6. Run an incremental update on all your document collections. To do this, select the document collections at the Indexing Options page and click **Start Incremental Update**. (For details, see “7.3 Indexing Document Collections” on page 75.)
7. When the incremental update is complete, synchronize your document collections. To do this, first add a document sync window at the Indexing Server Setup page. Then while the window is open, go to Setup, System Options, Document Selection and Indexing, Document Synchronization and click **Sync Docs Now**. (For details, see “7.4 Synchronizing Document Collections” on page 77.)
8. When synchronization is complete, run another incremental update on all your document collections.
9. When the second incremental update is complete, build full-text indexes. To do this, first add a full-text indexing scheduling window. Then while the window is open, go to Setup, System Options, Indexing Settings, Full-Text Indexing and click **Rebuild Index Now**. (For details, see “7.5 Full-Text Indexing” on page 78.)
10. When full-text indexing is complete, reset all your windows according to the scheduling guidelines in the following subsection, “6.5.2 Routine Indexing Maintenance”.

6.5.2 ROUTINE INDEXING MAINTENANCE

The guidelines in this section show you how routine indexing updates can be set up. Routine indexing updates don't involve major changes to document collections.

To schedule routine updates, you define windows that set the time during which indexing, synchronization, and full-text indexing occur. For details on setting indexing and synchronization windows, see “6.4.1 Indexing Service Windows” on page 63. For details on setting full-text indexing windows, see “7.5.1 Scheduling Full-Text Indexing” on page 79.

You typically want indexing processes to run outside your organization's regular business hours and outside maintenance and backup processes on the server. Identify your nightly downtime when the West km servers are available for indexing—for example, 12 a.m. to 8 a.m.—and set up West km indexing windows during that downtime.

Note As an alternative to setting up indexing windows outside regular business hours, you may consider setting up 24-hour open windows for document indexing and then manually suspend the HTML conversion component during regular business hours. Unlike other components, the HTML conversion component accesses your DMS to retrieve documents, so running it during business hours should be avoided. For more information about the Suspend option, see “6.4.2 Indexing Components” on page 65.

Table 6-8 shows a sample schedule for routine indexing updates. It exemplifies the following best practices:

- If possible, run indexing processes daily.
- Avoid overlapping the indexing, synchronization, and full-text indexing windows.
- Set up windows incrementally in this order: indexing, synchronization, and full-text indexing.
- Run the full-text indexing reclaim process weekly.

Table 6-8. Example of a Daily Indexing Schedule¹

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
12 a.m.	Document Indexing Window, Daily, 12:00:00 AM–5:59:59 AM						
1 a.m.							
2 a.m.							
3 a.m.							
4 a.m.							
5 a.m.							
6 a.m.	Document Sync Window, Daily, 6:00:00 AM–6:59:59 AM						
7 a.m.	Full-Text Indexing Scheduling, Daily, 7:00:00 AM–7:59:59 AM						
8 a.m.	Regular Business Hours						Full-Text Indexing Reclaim Process, Sunday, 8:00:00 AM–9:59:59 PM
9 a.m.							
10 a.m.							
11 a.m.							
12 p.m. noon							
1 p.m.							
2 p.m.							
3 p.m.							
4 p.m.							
5 p.m.							
6 p.m.							
7 p.m.							
8 p.m.							
9 p.m.							
10 p.m.	Maintenance and Backups						
11 p.m.							

1. The example assumes a 24-hour open window for the document scheduling window and the purge window.

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Index documents in West km Express by setting up and indexing document collections, synchronizing indexed documents with your file system and DMS, and creating and updating full-text indexes.

7.1 Adding Document Collections

Add document collections and index them on the Indexing Options page.

Note You must add connections for the data sources and libraries that contain your documents before you add a document collection (see “6.2 Adding Data Source Connections” on page 55).

To access the Indexing Options page (Figure 7-1), complete these steps:

1. Open Internet Explorer and go to *hostname/km/plhome.aspx*, where *hostname* is the name of your West km server on your network.
2. Click the **Setup** link and then choose **Indexing Options**. A list of your indexed document collections is displayed.

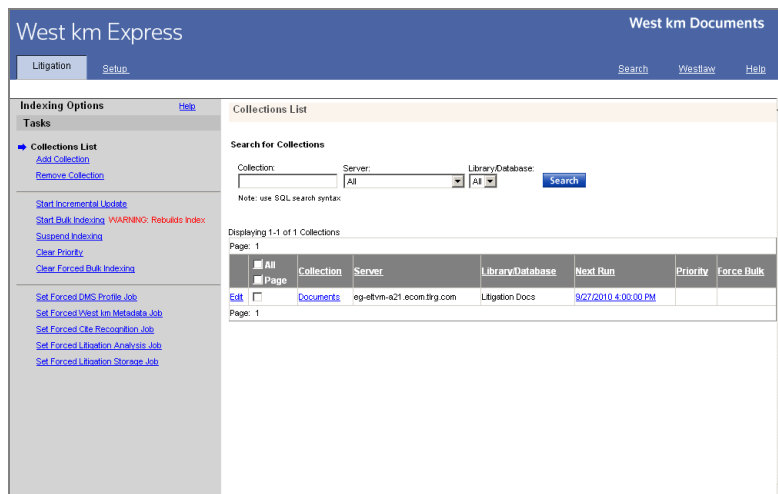


Figure 7-1. Indexing Options page

To add a new document collection, complete these steps:

1. At the Indexing Options page, click **Add Collection** in the *Tasks* list.
2. Make your selections for the document collection in the right frame of the Add Collection page. To easily navigate to different sections, click a link under *Add Collection* in the left frame.
3. Click **Save**.
4. If a collection hasn't been scheduled (i.e., there is no date in the *Next Run* column), click **Schedule** in the *Next Run* column to quickly access the Indexing Server Setup page and the document indexing windows where collections are scheduled.

Document indexing windows set the schedule for automatic indexing to occur. For details on setting up indexing service windows, see “6.4.1 Indexing Service Windows” on page 63.

To return to the listing of document collections on the Indexing Options page, click **Collections List**.

The following subsections provide instructions on selecting options when adding a document collection.

7.1.1 GENERAL INFORMATION

In the *General Information* section on the Add Collection page, you define the location of documents and general collection information. Depending on how the documents are managed—a DMS or the NT file system—the information needed is slightly different.

7.1.1.1 DMS Sources

1. Choose the server or location containing the DMS documents you want to index from the *Server* drop-down list.
2. Choose the database containing the document collection from the *Database* drop-down list.
3. If the documents are managed using ProLaw, complete these steps in the *General Information* section on the Add Collection page (Figure 7-2):
 - a. Click the **Add Collection** button in the right frame. (Or to edit a collection you've already defined, select the collection in the *Available Collections* list and click **Edit Collection**.)

General Information:

Server: Database:

Available Collections

Include documents within subfolders

Collection Name:

Collection Description:

Figure 7-2. Add Collection page, General Information: adding a ProLaw collection

- b. In the Document Collection dialog box (Figure 7-3), type a collection name and fill in any ProLaw criteria you want used to select documents for inclusion in this collection. If you don't indicate any criteria, all documents in the selected database will be included.

West km -- Web Page Dialog

Collection Name:

Created beginning date: Created ending date: Event type:

Matter ID: Client sort: Event class:

Created by initials: Created by office: Event notes:

Figure 7-3. Document Collection dialog box for ProLaw

- c. Click **Save**.

4. Select the document collection you want to index from the available list (e.g., folders, saved searches) (Figure 7-4).

Figure 7-4. Add Collection page, General Information: selecting a document collection

5. If you want to give the collection a specific name, type the name in the *Collection Name* text box. This name will be listed on the Indexing Options page. (If you don't indicate a name, the saved search or NTFS path you selected as the source of documents will be used as the collection name, along with the server and database.)
6. If you want to add a description for the collection, type the description in the *Collection Description* text box. This description is displayed when you hover over the collection's name on the Indexing Options page.

7.1.1.2 File System Sources

1. Choose the server containing the documents you want to index from the *Server* drop-down list.
2. Choose the location on the server that contains the documents from the *Database* drop-down list.
3. Click the **Browse** button (Figure 7-5). In the *File name* text box, enter the server and share using a UNC path (`\\server\share\`)—not a mapped drive—and go to the folder whose documents you want to index as a collection. Select a document in the folder and click **Open**.

Figure 7-5. Add Collection page, General Information section

4. If you want all subfolders at the location to be indexed as part of this collection, select the **Include Documents within Subfolders** check box.
5. If you want to give the collection a specific name, type the name in the *Collection Name* text box. This name will be listed on the Indexing Options page. (If you don't indicate a name, the NTFS path you selected as the source of documents will be used as the collection name, along with the server and database.)
6. If you want to add a description for the collection, type the description in the *Collection Description* text box. This description is displayed when you hover over the collection's name on the Indexing Options page.

7.1.2 INDEXING JOBS

In the *Indexing Jobs* section on the Add Collection page (Figure 7-6), you select indexing job options for the collection.

Indexing Jobs:

- Make Top Priority

At the next scheduled update:

- Force a bulk index
- Force DMS Profile Job
- Force West km Metadata Job
- Force Cite Recognition Job
- Force Litigation Analysis Job
- Force Litigation Storage Job
- Skip Sync Process

Figure 7-6. Add Collection page, Indexing Jobs section

1. If you want this collection to have priority over other collections being indexed at the same time, select the **Make Top Priority** check box. If multiple collections are marked top priority, then priority is given to the oldest collection, based on the date it was last indexed.
2. If you want this collection to be completely re-indexed the next time an incremental update occurs, select the **Force a Bulk Index** check box. This option is useful if you want to fully re-index collections on a staggered schedule.

Note This option is available only after you save the collection. It clears automatically after the next incremental update occurs.

3. If you want to force one or more indexing components to process all documents in the collection the next time an incremental update occurs (instead of just processing the new or modified documents), select the **Force** check boxes for the appropriate indexing components in the *At the Next Scheduled Update* section.

For example, selecting the Force Cite Recognition Job check box could be useful if you receive a new version of RID and would like to index citation information for the entire collection.

Note After the next incremental update occurs, selected options clear automatically.

4. If you want to prevent the synchronization process from running on the collection, select the **Skip Sync Process** check box. If you select this option, documents in the collection will not be removed from West km Express, even if they have been deleted from your organization's file system or are no longer part of the defined document collection.

7.1.3 CITATION RECOGNITION INDEXING

In the *Cite Recognition Indexing* section on the Add Collection page (Figure 7-7), you set options for how the cite recognition component runs for the collection.

Cite Recognition Indexing:

- Run RID Indexing:
- Only Index Documents with Citations

Default Jurisdiction: None

Figure 7-7. Add Collection page, Cite Recognition Indexing section

1. If you want the cite recognition component to run and index citation information within documents, select the **Run RID Indexing** check box. (If you clear this selection, only the text of documents, not citation information, will be indexed.)
2. If you want to index only documents that contain one or more citations, select the **Only Index Documents with Citations** check box.
3. Choose a default jurisdiction for this document collection from the *Default Jurisdiction* drop-down list. You can choose from the following options:
 - **None:** No default jurisdiction is used. Citations are not linked if they are missing jurisdictional information or contain publications valid in multiple jurisdictions.
 - **All:** RID performs additional processing to identify citations that contain publications valid in multiple jurisdictions. RID checks the publication in each valid jurisdiction. If only one jurisdiction is identified with high confidence, the citation is linked to that jurisdiction. If more than one jurisdiction (or no jurisdiction) is identified with high confidence, the citation is not linked.

For example, the publication name *PS* is valid in Pennsylvania (Pennsylvania statutes, e.g., 20 P.S. s. 908) and Maryland (public safety code, e.g., P.S. s. 3-101). With the All option selected, RID checks the publication in both Pennsylvania and Maryland before determining if and how to link the citation.

Note Using the All option may increase the time required for indexing. In addition, RID 2.10 or later is required for the All option to function.

- **A state abbreviation:** A default jurisdiction is used to identify citations that are missing jurisdictional information or that contain publications valid in multiple jurisdictions. RID can often use the state in which the referenced document was created to uniquely identify citations when a citation is generic or several publications share the same publication name.

For example, if a document refers to *Code section 100*, the publication name *Code* is generic. A state must be specified to identify the statute being referenced. If a document refers to *IC sec 100*, the publication name *IC* is used for both Idaho and Indiana statutes. Idaho or Indiana must be specified to identify which statute set is being referenced.

7.1.4 ANALYSIS INDEXING

In the *Analysis Indexing* section on the Add Collection page (Figure 7-8), you can set documents in the collection to be analyzed

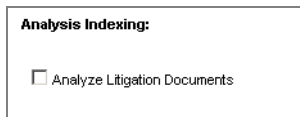


Figure 7-8. Add Collection page, Analysis Indexing section

If you want the litigation analysis component (i.e., analyzer component) to run and mine document data, select the **Analyze Litigation Documents** check box.

7.2 Changing Document Collections

7.2.1 SEARCHING FOR DOCUMENT COLLECTIONS

To search for document collections, enter values in the fields in the *Search for Collections* section at the top of the Indexing Options page (Figure 7-9) and click **Search**.

Figure 7-9. Indexing Options page, Search for Collections section

- For the Collection field, values that contain the search string you type are found.
You can use the following wildcard characters in the Collection field:
 - % (percent sign): a substitute for zero or more characters
 - _ (underscore): a substitute for exactly one character
- For the Server and Library/Database fields, values that exactly match your selections are found.
- You must select a server before selecting a library/database.

To display all document collections, clear any value in the Collection field, select **All** for the other fields, and then click **Search**.

7.2.2 EDITING DOCUMENT COLLECTIONS

To edit a document collection's definitions, click **Edit** next to the collection on the Indexing Options page. Then make your changes on the Edit Collection page and click **Save**. Changes will be applied during the next indexing of the collection.

You can also edit definitions for several collections at once. On the Indexing Options page, select the check box to the left of each collection that you want to edit. Then click the editing option you want to apply in the *Tasks* list.

- The Clear Priority option clears the *Make Top Priority* check box for the collection so that the collection no longer receives indexing priority over other collections.
- The Clear Forced Bulk Indexing option clears the *Force a Bulk Index* check box for the collection so that the collection will be updated, and not completely re-indexed, when it is next scheduled for an incremental update.
- Each Set Forced... option selects the corresponding component check box for the collection (e.g., *Force DMS Profile Job*) so that the component processes all documents in the collection the next time an incremental update occurs (instead of just processing the new or modified documents).

7.2.3 REMOVING DOCUMENT COLLECTIONS

To permanently remove one or more document collections, complete these steps:

1. On the Indexing Options page, select the check box to the left of each collection you want to remove.
2. In the *Tasks* list, click **Remove Collection**.
3. At the notification message, click **OK**.

If you remove a document collection that has already been indexed, it will prevent the collection from being re-indexed. However, note the following:

- The documents as they were last indexed are available to members until the document collection is synchronized (for details, see "7.4 Synchronizing Document Collections" on page 77).
- The documents are represented in full-text indexes until full-text indexes are updated (see "7.5 Full-Text Indexing" on page 78).
- Documents that are duplicated in other collections are not removed.

7.3 Indexing Document Collections

Once you add a document collection, you need to index its documents. You can do this by manually launching indexing or by scheduling automatic incremental updates. You can also suspend indexing.

7.3.1 MANUALLY LAUNCHING INDEXING OF DOCUMENT COLLECTIONS

When you manually launch indexing, you can do any of the following:

- bulk index newly added document collections
- bulk index (i.e., fully re-index) previously indexed collections
- incrementally update previously indexed collections

Complete these steps to manually launch indexing for one or more document collections on the Indexing Options page:

1. If desired, configure indexing to meet the specific needs of your organization. For details, see chapter 6 “Configuring Indexing” on page 54.
2. Make sure a document indexing window is defined for the document collection you want to index. For details, see “6.4.1 Indexing Service Windows” on page 63.
3. On the Indexing Options page, select the check box to the left of each collection that you want to index.
4. Click one of the following in the *Tasks* list:
 - **Start Bulk Indexing:** Index a newly defined collection or fully re-index a previously indexed collection. During a bulk index, all documents in the collection are indexed.
Note When bulk indexing, consider using the Suspend and Process by Component options on the Indexing Server Setup page to control how and when indexing components are processed (for details, see “6.4.2 Indexing Components” on page 65).
 - **Start Incremental Update:** Update the index for a previously indexed collection. During an incremental update, documents in the collection are indexed if they are new or modified and they have a date and time after the collection was last indexed.
5. Click **OK** at the notification message. The indexing job is scheduled immediately, and indexing will start according to the collection’s document indexing window.
6. To monitor the indexing progress for a collection, click the collection name on the Indexing Options page to access indexing statistics on the Statistics page. For more information, see “9.1.1 Indexing” on page 96.

Once indexing has occurred on a document collection, you can also manually launch indexing of selected documents on the Statistics page. For details, see “9.1.1.2 Viewing and Reprocessing Documents” on page 99.

Note During bulk indexing and incremental updates, full-text indexes are not created or updated. For information on updating the full-text indexes at your organization, see “7.5 Full-Text Indexing” on page 78.

7.3.2 SCHEDULING AUTOMATIC INDEXING OF DOCUMENT COLLECTIONS

To set a schedule to automatically run incremental updates for a document collection, define a document scheduling window on the Indexing Server Setup page. When both a document scheduling window and a document indexing window for a document collection are open, scheduling occurs. To create separate schedules for specific DMS connections or document collections, define multiple document indexing windows. For details, see “6.4.1 Indexing Service Windows” on page 63.

When you set up automatic indexing, it is recommended that you set the document scheduling window to a 24-hour open window (e.g., 12:00:00 AM–12:00:00 AM) and the indexing windows outside

regular business hours. For more information about scheduling indexing, see “6.5 Setting Up Indexing Processes” on page 65.

7.3.3 UNDERSTANDING INDEXING PERFORMANCE

The time required for indexing is affected by several factors, including the following:

- hardware processor and memory (i.e., CPU and RAM)
- number and size of documents
- average number of citations per document
- fluctuations in RID performance
- number of documents in the West km database
- DMS used to store the documents
- Internet connection speed
- configuration of West km Express (e.g., thread count)
- other activities on the server

Depending on your setup, Table 7-1 lists the approximate number of documents that can be indexed per hour for each indexing component:

Table 7-1. Indexing performance by component

Indexing Component	Documents per Hour ¹
Profile Metadata	3,000–5,000
HTML Conversion/Profile Metadata	2,000–4,000
Citation Recognition (RID)	1,500
Litigation Analysis	2000

1. These numbers are estimates only. Performance may vary at your organization.

7.3.4 INDEXING DOCUMENTS WITH MULTIPLE VERSIONS

If your DMS tracks document versions, the highest version of a document is indexed in West km Express. However, West km Express uses a document’s last modified date, regardless of version, to determine whether the document is indexed during incremental updates.

If your DMS does not mandate new versions of documents, it is possible that an older dated DMS version of the document will be indexed in West km Express. For example, suppose you have versions 1 and 2 of a document in your DMS and then modify version 1 without creating a new version. The document will be marked for an incremental update because the last modified date for version 1 has been updated, but version 2 will actually be indexed because it is the higher version.

7.3.5 INDEXING DOCUMENTS IN MULTIPLE DOCUMENT COLLECTIONS

Documents that belong to multiple document collections inherit indexing options from all document collections that contain them. Indexing options include the indexing components that process the document.

The first (primary) document collection processes the document according to its indexing options. When another document collection that contains the document is indexed, additional processing occurs for the document as necessary. Processing that was completed previously by the primary document collection is not duplicated for the document, unless the document was modified in the interim.

7.3.6 SUSPENDING INDEXING

You can temporarily suspend indexing in two ways:

- suspend indexing of all document collections
- suspend one or more indexing components for all document collections

To temporarily suspend indexing of all document collections, click **Suspend Indexing** in the *Tasks* list on the Indexing Options page. To remove the suspension, click **Unsuspend Indexing**.

Note Indexing will be automatically suspended if you reach your maximum storage for HTML document renderings.

To temporarily suspend one or more indexing components, go to the Indexing Server Setup page. In the *Suspend* column, select the check boxes for the components you want to suspend. As long as *Suspend* is selected, processing for that component is suspended for all document collections during indexing, regardless of what is set for the individual document collections.

If you suspend HTML conversion (upon which all other components are dependent), the following behavior occurs when indexing is attempted on a document collection:

- During a bulk indexing, nothing is processed.
- During an incremental update, documents new to the collection are not processed. However, characteristic changes that have been made to the collection since the last indexing are processed.

If the cite recognition component is suspended and you can't unsuspend it, your data validation key may be invalid or missing. The data validation key is required for the cite recognition component to communicate with the cite ID (RID) and KeyCite flags servers at Thomson Reuters during indexing. Contact your West km representative for a new product key and enter it on the System Configuration page. For details, see "2.4 Viewing Your West km Configuration" on page 20.

7.3.7 STOPPING INDEXING

To stop the indexing process while it is running, stop the West km services and the World Wide Web Publishing Service. For each service, complete these steps on the service's associated server to stop the service:

1. Click the **Start** button, choose **Administrative Tools**, and then choose **Services**.
2. In the Services window, right-click the name of the service (e.g., **West km Indexing Service**) and choose **Stop**. Services are listed in Table 2-1 on page 18.

To restart services after they have been stopped, restart the World Wide Web Publishing Service and then start the West km services. For more information, see "2.2.4 Verifying Services Are Started" on page 18.

7.4 Synchronizing Document Collections

The synchronization feature compares the list of your currently indexed documents in West km Express to the list of documents in your DMS or on your file system. It then removes indexed documents from West km Express that

- have been deleted from your organization's file system.
- are no longer part of document collections you have defined to be indexed with West km Express.
- have been identified as having no citations after RID processing, and that are part of document collections set to index only documents that contain one or more citations.

The synchronization process evaluates one document collection at a time. When every document has been identified in a collection, the appropriate documents are removed. If a data source connection is down or synchronization fails for a collection, synchronization proceeds with the next document collection.

When removing documents, synchronization deletes entries in the West km database, HTML document renderings, and profile metadata. Documents are still represented in full-text indexes, however, until full-text indexes are updated (see the following section, “7.5 Full-Text Indexing”).

7.4.1 SCHEDULING SYNCHRONIZATION

Upon installation, West km Express is set up to synchronize documents according to system default settings, but you may want to change these settings either before or after you index documents for the first time.

You schedule synchronization by defining a document sync window. (For details, see “6.4.1 Indexing Service Windows” on page 63.) By default, a 24-hour open window is used. For the fastest processing speed, it is recommended that you set the sync window’s start time outside regular business hours. To prevent potential conflicts, avoid overlapping the sync window with indexing windows.

For more information about scheduling synchronization, see “6.5 Setting Up Indexing Processes” on page 65.

7.4.2 MANUALLY LAUNCHING SYNCHRONIZATION

To manually launch synchronization anytime you wish during the open window, go to the page at Setup, System Options, Document Selection and Indexing, Document Synchronization and click **Sync Docs Now**. If the document sync window is not open, synchronization starts once the window opens.

7.5 Full-Text Indexing

Full-text indexes are used to retrieve your organization’s documents when a West km member at your organization performs a term search. When full-text indexes are created, all documents are processed. When full-text indexes are updated, processing occurs for new, modified, and deleted documents since the last full-text indexing.

During full-text indexing, searches can simultaneously be performed in West km Express. Note, however, that search performance may be negatively affected. For this reason, it is recommended that you schedule or launch full-text indexing outside regular business hours. In addition, you should not simultaneously run full-text indexing and other West km indexing and synchronization processes.

The time required for full-text indexing is affected by several factors, including your system configuration and the content collection being indexed. Approximately 20,000 documents can be full-text indexed per hour, although this number is an estimate and performance may vary at your organization.

7.5.1 SCHEDULING FULL-TEXT INDEXING

Upon installation, West km Express is set up to full-text index documents according to system default settings, but you may want to change these settings either before or after you index documents for the first time.

Full-text indexing is scheduled by defining indexing time windows in the full-text searching service. You may want to define multiple time windows to account for different frequencies (e.g., weekdays vs. weekends) and different full-text indexing processes (i.e., index vs. reclaim processes).

To schedule full-text indexing, complete these steps:

1. Click the **Setup** link and then choose **HTML Storage**. The HTML Storage page is displayed (Figure 7-10).

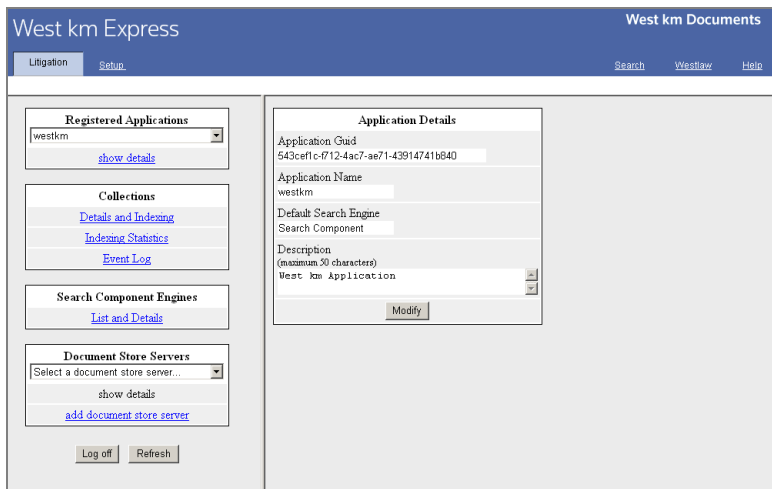


Figure 7-10. HTML Storage page

2. Click **Details and Indexing** in the left frame. The WestKM storage collection is listed in the right frame (Figure 7-11).

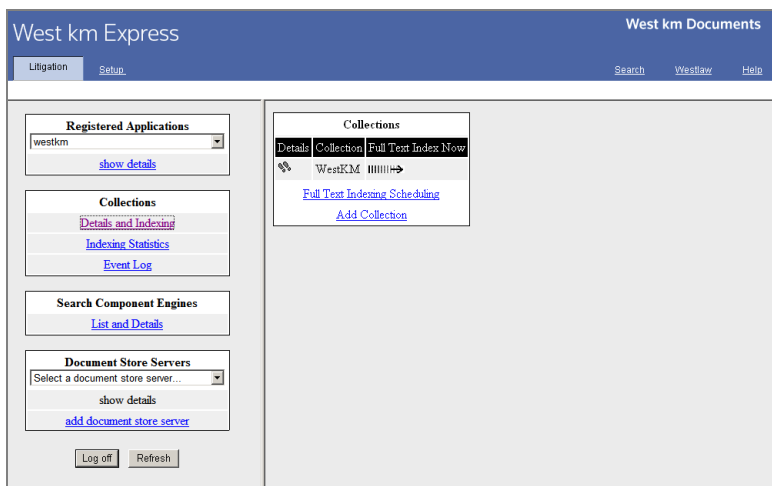


Figure 7-11. HTML Storage page, Collections section

- Click **Full Text Indexing Scheduling** below the storage collections listing in the right frame. The full-text indexing schedule is displayed in the right frame (Figure 7-12).

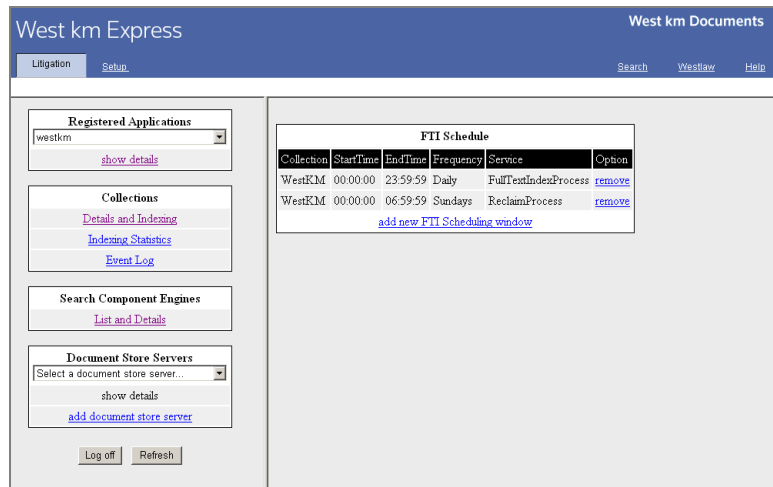


Figure 7-12. HTML Storage page, FTI Schedule section

- Click **Add New FTI Scheduling Window** below the full-text indexing schedule.
- In the *Add FTI Scheduling Window* section (Figure 7-13), do the following and click **Save**.

- Collection Name:** Choose the **WestKM** storage collection.
- Start time and End time:** Type the start time and the end time for the window in HH:MM:SS format (e.g., type 23:00:00 for 11:00 p.m. and type 06:00:00 for 6:00 a.m.).

A window's start time always occurs on the day specified by the frequency. The end time may occur the day afterward, depending on whether the start time is set before or after the end time.

Note The start time and end time should not be the same, or the window is considered to be open for zero time instead of 24 hours. For example, use a start time of 00:00:00 and an end time of 23:59:59 if you want a 24-hour window.

- Frequency Type:** Choose the frequency for which you'd like the window to be in effect. Weekdays refer to Monday through Friday. Weekends refer to Saturday and Sunday.
- Service Type:** Choose the full-text indexing process that the windows controls.

FullTextIndexProcess creates and updates index files for searching. For example, for a storage collection you may want the full-text indexing process to run daily.

ReclaimProcess optimizes index files for searching. For storage collections that are being updated, the reclaim process is recommended weekly.

Note In general, the ReclaimProcess window should be open about three hours. It can overlap the FullTextIndexProcess window, but the reclaim process takes priority if they are scheduled at the same time.

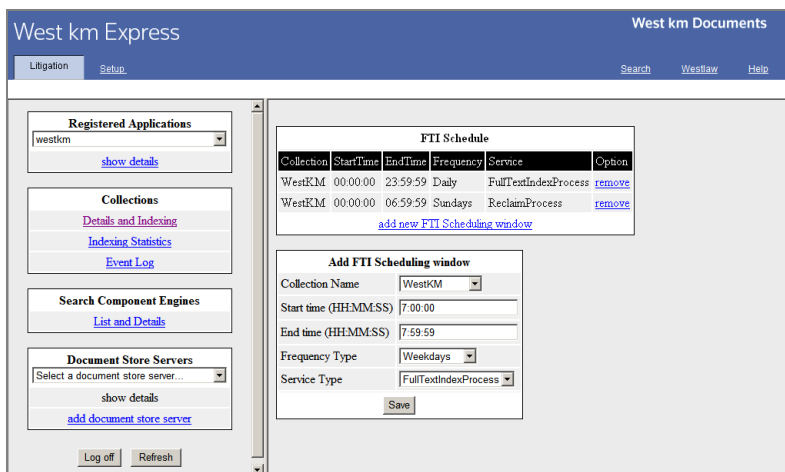


Figure 7-13. HTML Storage page, Add FTI Scheduling Window section

6. Repeat steps 4–5 for each full-text indexing window you want to schedule.

For example, if you want full-text indexing to run twice each day, define two windows with a frequency type of Daily, but with different start and end times.

If you want full-text indexing to run during one window on weekdays and another on weekends, define two windows and choose a frequency type of Weekdays for one window and Weekends for the other, with different start and end times for each.

Full-text indexing will start automatically within ten minutes after reaching the start of the window. At the close of the window, the search component will finish full-text indexing the currently processing documents (which takes approximately five to ten minutes) before stopping.

To remove a full-text indexing window, click **Remove** next to the listing.

To change an existing full-text indexing window, remove the window and then add another window with the settings you want.

7.5.2 MANUALLY LAUNCHING FULL-TEXT INDEXING

You can manually create or update the full-text indexes at your organization.

Note When you use the manual launch method to update existing full-text indexes, processing occurs for all documents. This is unlike updates that occur via the regularly scheduled windows, in which processing occurs only for new, modified, and deleted documents.


To manually launch full-text indexing, complete these steps:

1. Click the **Setup** link and then choose **System Options**.
2. Click **Indexing Settings**.
3. If you want to fully re-create index files (and not just update existing index files), click **Update Collection XML** in the *Full-Text Indexing* section.
4. To start full-text indexing updates for all storage collections, click **Rebuild Index Now** in the *Full Text Indexing* section. (If the full-text indexing scheduling window is not open, indexing starts once the window opens.)

7.5.3 ADMINISTERING STORAGE COLLECTIONS

You can modify the settings for a storage collection. You can also get document counts and administer storage collections.

To modify or administer a storage collection, complete these steps:

1. Click the **Setup** link and then choose **HTML Storage**.
2. In the left frame, click **Details and Indexing**.
3. In the right frame, click the **Details** icon  next to the WestKM storage collection.

To modify a storage collection, click **Modify**, make the changes you want in the *Collection Details* section (Figure 7-14), and click **Save**.

To view the number of documents in the storage collection that are indexed in the search component, click **Run Search** in the *Get Collection Document Count* section.

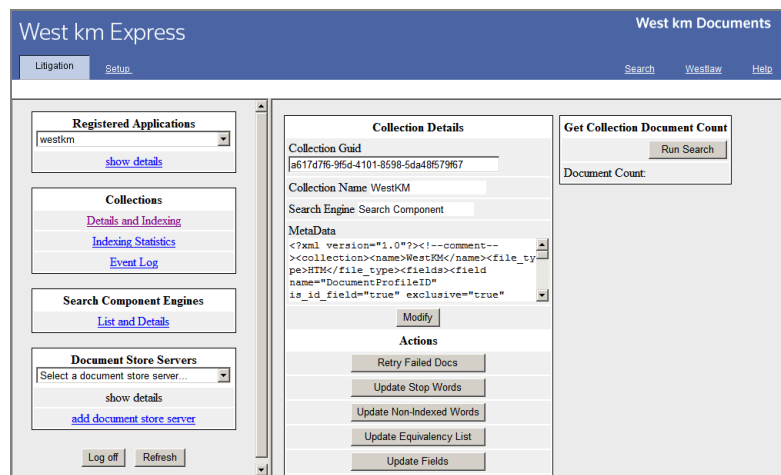


Figure 7-14. HTML Storage page, Collection Details section

Actions

- To retry full-text indexing of failed documents in the storage collection, click **Retry Failed Docs**. When the full-text indexing window opens, the search component will attempt to reprocess the failed documents.
Note The search component will automatically retry failed documents according to the `NovusIndexRetryAttempts` property in the `Thomson.FTSearch.Server.exe.config` file. The **Retry Failed Docs** function could be useful, for example, if the search component was down and you want to manually launch reprocessing attempts.
- The *Update* functions (Update Stop Words, Update Non-Indexed Words, Update Equivalency List, Update Fields, Update Abbreviation List, and Update Collection XML) are typically necessary only after an upgrade, but will have no ill effect if used at other times.
- To update the storage collection's XML files, which contain high-level data for the storage collection, click **Update Collection XML**. This function is used only for troubleshooting purposes, but will have no ill effect if used at other times.
- To manually start the `ReclaimProcess` for the storage collection, regardless of the scheduled time window, click **Reclaim Merge**. This process optimizes index files for searching.
- Do not use the `Destroy Content` function without the assistance of a West km representative. This function deletes all search component index files and document content from the search component databases. It should be used only in certain troubleshooting situations.

7.6 Updating Search Metadata

Search tables in West km Express store metadata that is used to retrieve search results. These metadata tables automatically update at the close of the document indexing window. You also have the ability to update the tables at any time.

You may want to manually invoke this process if you indexed documents in West km Express for the first time and want to force the process before the close of the window or if the automatic update fails.

To update search metadata, complete these steps:

1. Click the **Setup** link and then choose **System Options**.
2. In the left frame click **Indexing Settings** and then click **General Settings**.
3. To perform a bulk update, which updates search metadata for all documents, select the **Update for All Documents** check box. By default, an incremental update is performed, which updates profile data for documents that have changed since the last update. (The first time the process runs, metadata for all documents is generated.)
4. Click **Update Search Metadata**.

When the update is completed, updated information is displayed for *Last Completed Job* and *Last Job Status*.

7.7 Rearranging Document Collections

Once you have set up your document collections and indexed them in West km Express, it is possible that you might later want to rearrange the way collections are set up. For example, you might want to delete and add collections or move documents between collections. The following methods are recommended to implement these common changes and to avoid unnecessary re-indexing of documents.

Note For changes that require you to remove data source connections, it is recommended that you seek assistance from your West km representative if you wish to avoid re-indexing documents.

7.7.1 ADDING AND DELETING DOCUMENT COLLECTIONS

To add new collections and delete the old, complete the steps in Table 7-2.

Table 7-2. Steps to add new collections and delete old ones

Complete these steps	For more information, see
1. Add the new document collections.	"7.1 Adding Document Collections" on page 69
2. Run bulk indexing on the new document collections.	"7.3 Indexing Document Collections" on page 75
3. Remove the old document collections.	"7.2.3 Removing Document Collections" on page 74
4. Run synchronization.	"7.4 Synchronizing Document Collections" on page 77
5. Run an incremental update on all the document collections.	"7.3 Indexing Document Collections" on page 75
6. Run full-text indexing.	"7.5 Full-Text Indexing" on page 78

7.7.2 MOVING DOCUMENTS BETWEEN COLLECTIONS

To move documents between document collections, complete the steps in Table 7-3.

Table 7-3. Steps to move documents between collections

Complete these steps	For more information, see
1. Move the documents on your file system or change the criteria for your DMS saved searches.	<i>not applicable</i>
2. Run an incremental update on all the document collections.	"7.3 Indexing Document Collections" on page 75
3. Run synchronization.	"7.4 Synchronizing Document Collections" on page 77
4. Run an incremental update on all the document collections.	"7.3 Indexing Document Collections" on page 75
5. Run full-text indexing.	"7.5 Full-Text Indexing" on page 78

7.7.3 DELETING DOCUMENTS FROM A COLLECTION

To delete documents from a collection, complete the steps in Table 7-4.

Table 7-4. Steps to delete documents from a collection

Complete these steps	For more information, see
1. Do one of the following: <ul style="list-style-type: none">• Delete (or move) documents from your file system so they are no longer in folders indexed by West kmExpress.• Remove documents from document collections you have defined to be indexed with West km Express. For example, you could change the criteria for DMS saved search to exclude the documents.	<i>not applicable</i>
2. Run synchronization.	"7.4 Synchronizing Document Collections" on page 77

8 Administering West km Members

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If you use West km custom authentication or integrated Windows authentication as your authentication method in West km Express, the Professionals table is used to administer your West km members. For example, you can activate or deactivate a member, add information for a member, or add a member.

Note For more information about West km authentication methods, see “2.1.4 Authentication Methods” on page 10. For details about the configuration that is required for authentication to function properly, see “Appendix C: Authentication and Document Security Configuration” on page 140.

8.1 Using the Professionals Page

To access the Professionals page to administer your West km members, complete these steps:

1. Open Internet Explorer and go to *hostname/km/plhome.aspx*, where *hostname* is the name of your West km server on your network.
2. Click the **Setup** link and then choose **Professionals**. The Professionals page is displayed (Figure 8-1).

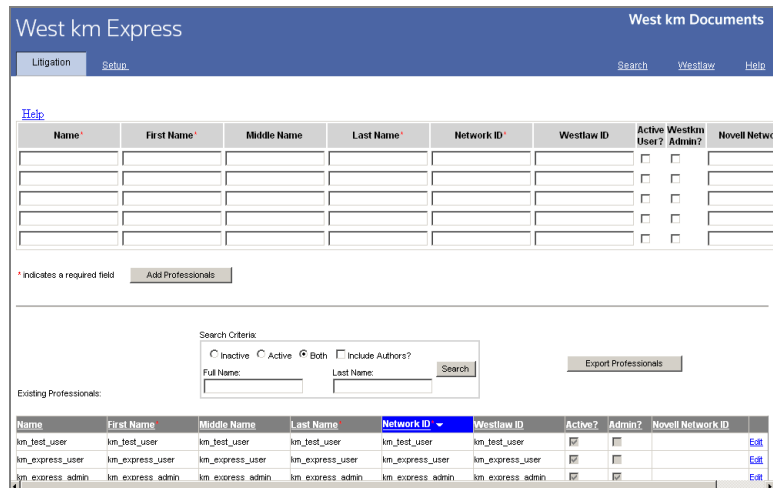


Figure 8-1. Professionals page

The Professionals table at the bottom of the page lists members of your organization. Table 8-1 describes the categories of information.

Table 8-1. Data in the Professionals table

Name fields	The member’s full name.
Network ID	The member’s ID to log on to your organization’s network, including the domain name. A Windows network ID must be qualified by the domain (e.g., USA\W010) and a Novell network ID must be in full context (e.g., username.dept.location.us).
Westlaw ID	The member’s password to sign on to Westlaw Classic. You can include both numbers and letters, but only the numeric portion is required. Although the user interface requires that you enter a value, Westlaw passwords in the Professionals table are used as part of West km user validation only when the user accesses Westlaw Classic (not WestlawNext) and if West km custom authentication is used.
Active User	When selected, the member is able to access your organization’s documents in West km Express. You can have as many active members as provided in your license agreement.

Table 8-1. Data in the Professionals table (continued)

Westkm Admin	When selected, the member has rights to the West km setup pages and to manually delete documents from West km.
Novell Network ID	<p>The member's ID to log on to your organization's Novell network, provided in full context (e.g., username.dept.location.us). This field authenticates the member for document security when Novell network software is being used at your organization with eDOCS DM and when user accounts in your DMS are mapped to Novell accounts.</p> <p>To enable this field, you must also select the Use Novell Credentials for Security option when adding data source connections. For details, see "6.2 Adding Data Source Connections" on page 55.</p> <p>Note If your organization has a Novell network and a DMS <i>other</i> than eDOCS DM, enter Novell network IDs in the <i>Network ID</i> field instead.</p>

To change the sort order of the table, click the column heading by which you want to sort.

8.1.1 FINDING A MEMBER LISTING

You can use the *Search Criteria* section on the Professionals page to easily find the listing for a particular member of your organization.

1. In the *Search Criteria* section (Figure 8-2), select whether you want to search for an inactive member, an active member, or both.
2. If you would like to include author names in your search, select the **Include Authors** check box.
By default, only member records with a network ID or a custom username are displayed in the Professionals table. Additional member records (i.e., author names) are added to the West km database during the indexing process from information in your DMS. They are available for display if you select this check box.
3. Type either the full name or the last name of the member in the appropriate text box. Results will contain the specified text anywhere in that portion of the name.

If you are searching for author names, enter the name in the *Full Name* text box rather than the *Last Name* text box, because only the *Name* field is populated for these records.

Search Criteria:
 Inactive Active Both Include Authors?
Full Name: Last Name:

Figure 8-2. Professionals page, Search Criteria section

4. Click **Search**.

The members matching your search criteria are listed in the Professionals table. (To display all members in the Professionals table, select **Both** in the *Search Criteria* section, clear any values in the text boxes, and click **Search**.)

8.1.2 ADDING A MEMBER LISTING

If a member isn't listed in the Professionals table, you can add the member.

Note To avoid duplicate entries, always check the Professionals table for the member before adding a new entry.

1. Type the member's information in the first blank row of the text boxes in the table (Figure 8-3). A red asterisk indicates required information.
2. Repeat step 1 for up to four additional new members.

3. Click **Add Professionals**.

Name	First Name	Middle Name	Last Name	Network ID*	Westlaw ID	Active User?	Westlan Admin?	Novel Network ID
Monica Seles	Monica		Seles	USAW0011	216700PVCX	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
James Blake	James		Blake	USAW0011	153700CVIM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>	

* indicates a required field

Add Professionals

Figure 8-3. Professionals page, adding professionals

If you want to add an extensive list of members to the Professionals table, see “8.3 Importing Member Data” on page 89.

8.1.3 EDITING A MEMBER LISTING

You can edit a member’s listing, for example, to activate or deactivate a member or to add information for a member.

1. Click **Edit** next to the member’s listing in the Professionals table.
2. Make the changes to the member’s row and fill in all required information, which is marked with a red asterisk.
3. Click **Update**.

8.2 Using Additional Authentication Credentials

8.2.1 CUSTOM USERNAME AND PASSWORD

The Professionals table will include the columns Custom User Name and Custom User Password if your organization uses West km custom authentication.

In this situation, you need to add West km usernames and passwords for each of your active members. Usernames and passwords are limited to 64 characters, and passwords are case-sensitive. Your active members will be prompted for this login information when accessing West km content from their Web browser.

For more information about West km custom authentication, see “2.1.4 Authentication Methods” on page 10.

8.2.2 DMS USER ID AND PASSWORD

The Professionals table will include columns for DMS UserID or DMS Password (or both) if your organization

- uses WorkSite (iManage) as its DMS and uses virtual logins rather than NT integrated logins
- uses eDOCS DM as its DMS (with an API connection to West km) and requires that user-based access records be logged when members request documents from the DMS when using the Load Copy feature

In this situation, you need to add either a DMS user ID or DMS password (or both) to the appropriate columns.

For WorkSite and eDOCS DM, you need to indicate the server and database to which the member has access in the *Server\DB* column. A member may be able to access more than one database; in this situation, a drop-down list is displayed in the *Server\DB* column. When adding or editing a member’s information, you need to choose the databases from the *Server\DB* drop-down list to which you want the member to have access and specify the member’s DMS login information. The login information will apply to all selected databases.

You can adjust the columns in the Professionals table using settings on the Setup, System Options, DMS Settings page. For details, see page 35 (iManage) or page 33 (DM).

8.3 Importing Member Data

If you have an extensive list of members to add to the Professionals table, you can import member data using the West km Professionals Import Utility. Importing member data requires creating an input file in comma-separated value (.csv) format and then running the utility.

8.3.1 CREATING AN INPUT FILE

The first step when importing member data is to create an input file in .csv format with the data for the members to be imported. In .csv files, data is separated by commas, and each row of data ends in a carriage return.

The file needs to be saved on the West km server. Include the following data for each member you want to import, in the order listed:

- Network ID
- Custom User Name
- Custom User Password
- Westlaw ID
- Full Name
- First Name
- Middle Name
- Last Name
- Active User
- West km Admin
- Information Manager (leave blank)
- Annotator (leave blank)
- Novell Network ID
- Vetting Editor (leave blank)
- ASP Admin (leave blank)

8.3.1.1 Input File Requirements

When creating the input file, observe the following:

- For each member, you must enter a value for either the Network ID or the Custom User Name, and the value must uniquely identify the member.
- When entering a value for the Network ID, you must include the domain (e.g., fish\u0023).
- If you want to leave a category blank (e.g., Middle Name), don't enter a value but insert a comma in the .csv file to represent the data category. If you are using Excel to create the .csv file, the data cell for that category can be left blank; the comma will be inserted during the save process.
- When setting a value for Active User or West km Admin, it must be either 0 (not selected) or 1 (selected).
- Values cannot be imported for DMS UserID, DMS Password, or Server\DB (see "8.2.2 DMS User ID and Password" on page 88). You must use the Professionals table to enter this information after the import.

8.3.1.2 Input File Creation Tips

When creating the input file, the following tips may be helpful:

- Check to see if the members you intend to import already exist in the Professionals table. The import utility compares Network IDs or Custom User Names in the .csv file with the Professionals table and will import the new member if the field value is unique. Duplicate entries could result if members are already listed in the Professionals table without a Network ID or Custom User Name. Because entries in the Professionals table cannot be deleted, you may prefer to update the existing records before (or instead of) importing new ones.

- Because Microsoft Excel can save data in .csv format, you may find Excel a useful tool in preparing your import data. For example, you might receive member data from a variety of sources or in a variety of formats: Westlaw Classic users and passwords from your account manager, authors and network IDs from DMS output, or network domain information from your IT department. As necessary, Excel can be used to separate columns, to append two columns into one, or to order columns.

8.3.1.3 Separating Columns in Excel

You can use Excel to separate the data in a column. For example, you might have full names in one column.

To create separate columns for first, middle, and last names in Excel, complete these steps:

1. Select the column you want to separate and copy it to the last empty column of your worksheet (see the following subsection, “8.3.1.5 Moving and Copying Cells in Excel.”)
2. Select the newly copied column. From the Data menu, choose **Text to Columns**.
3. At the Convert Text to Columns Wizard, select **Delimited** and click **Next**.
4. Select **Space** as the only delimiter, click **Next**, and then click **Finish**.

8.3.1.4 Appending Columns in Excel

You can use Excel to append two columns into one. For example, you might have first names and last names in separate columns and need to create a single column for full name.

To place first and last names in one column in Excel, complete these steps:

1. In a blank column of your worksheet, select the first cell.
2. In the formula bar, type `=A1&B1`, where *A* is the column containing the first name and *B* is the column containing the last name. Then press **Enter**.
3. In the newly appended column, copy the formula to the remaining rows in the worksheet by dragging the fill handle from the first cell over the remaining cells.
4. If you want to delete the original separated columns, first copy the values in the newly appended column *without the formulas* to a blank column in your worksheet. To do so, select the new appended column, and from the Edit menu, choose **Copy**. Select the blank column, and from the Edit menu, choose **Paste Special**. Select **Values** as the only Paste option and click **OK**.

8.3.1.5 Moving and Copying Cells in Excel

You can use Excel to reorder columns of data so that they are in the order required.

To move and copy cells in Excel, complete these steps:

1. Select the cells you want to move or copy.
2. Point to the border of the selection.
3. Do one of the following:
 - To move the cells, drag the selection to the new location on the worksheet. Excel will ask if you want to replace any existing data.
 - To copy the cells, hold down the **CTRL** key as you drag.
 - To insert cells between existing cells, hold down the **SHIFT** key (if moving) or **SHIFT+CTRL** (if copying) as you drag.
 - To drag the selection to a different worksheet, hold down the **ALT** key and drag over a sheet tab.

8.3.2 RUNNING THE IMPORT UTILITY FROM THE GUI

The second step when importing member data is running the West km Professionals Import Utility, which reads the input file you created in .csv format and adds the unique members to the Professionals table.

To run the West km Professionals Import Utility from the graphical user interface, complete these steps:

1. On the West km server, go to the bin subfolder of the installation folder, e.g., D:\Program Files\Thomson\Westkm\bin.
2. Double-click the **Thomson.Westkm.ImportUtility.exe** file.
3. In the Import Utility dialog box (Figure 8-4), in the *File* text box, type the path and filename of the input file you created, e.g., C:\members.csv.

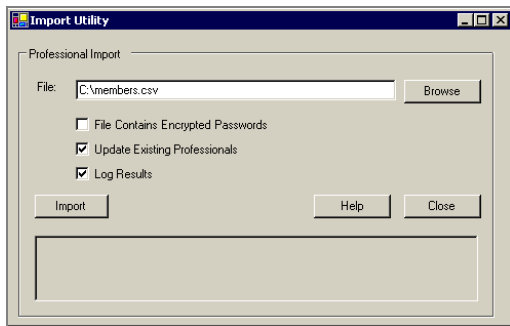


Figure 8-4. Import Utility dialog box

4. Clear the **File Contains Encrypted Passwords** check box.
5. If a member you are importing already exists in the Professionals table and you want to update that member's information, select the **Update Existing Professionals** check box.

For each member to be imported, the utility checks the Network ID. If a value is present, it compares the value to entries already in the Professionals table. If a value is not present, then it uses Custom User Name as a basis for comparison. If the value being compared already exists for an entry in the Professionals table, then information for the member is either imported or not, depending on your selection.

6. If you want to create a log of the import results for troubleshooting purposes, select **Log Results**.

By default, the log file is saved to the following location on the West km server:

[West km installation folder]\Logs\ImportUtility.log
(e.g., D:\Program Files\Thomson\Westkm\Logs\ImportUtility.log).

For more information about using log files, see "9.3 Using Trace Logs" on page 105.

7. Click **Import**.

8.3.3 RUNNING THE IMPORT UTILITY FROM THE COMMAND LINE

The West km Professionals Import Utility can also be run from the command line. You can import using an input file or you can import a single professional.

To access a command line, click the **Start** button, choose **Run**, type the command **cmd**, and click **OK**. Then type the command line, including the necessary options and parameters, and press **Enter**.

To close a command prompt window, type **exit**, and press **Enter**.

8.3.3.1 Importing Using an Input File

Command Line Format:

```
Thomson.Westkm.ImportUtility.exe FileName="filepath"  
[Log="1"] [Update="1"] [Encrypted="0"]
```

Brackets indicate an optional parameter; don't include the brackets when using the parameter.

Command Line Example:

```
Thomson.Westkm.ImportUtility.exe FileName="c:\import.csv"  
Log="1" Update="1" Encrypted="0"
```

Command Line Explanation (see Table 8-2):

Table 8-2. Import utility command line parameters using an input file

Parameter	Description
Thomson.Westkm.ImportUtility.exe	The executable program that runs the utility.
FileName (required)	The location where the input file is located, represented by <i>filepath</i> .
Log	Specifies if logging is turned on or off. Events are logged to the file specified in this application's configuration file. Set to 1 or 0. The default value is 1 (on).
Update	Specifies if you want to update member information if the member already exists in the Professionals table. Set to 1 or 0. The default value is 1 (on).
Encrypted	Specifies if the password provided is encrypted or not. Set to 1 or 0. The default value is 0 (not encrypted).

8.3.3.2 Importing a Single Professional

Command Line Format:

```
Thomson.Westkm.ImportUtility.exe  
NetworkID="networkID"  
[CustomUserName="customUserName"]  
[CustomPassword="customPassword"]  
[WestlawID="westlawID"]  
FullName="fullName"  
FirstName="firstName"  
[MiddleName="middleName"]  
LastName="lastName"  
[IsActive="isActive"]  
[IsAdmin="isAdmin"]  
[NovellID="novellID"]  
[Update="1"]
```

Brackets indicate an optional parameter; don't include the brackets when using the parameter.

Command Line Example:

```
Thomson.Westkm.ImportUtility.exe NetworkID="test\TestUser"  
WestlawID="1234" FullName="Test User" FirstName="Test"  
LastName="User" IsActive="1" IsAdmin="1" Update="0"
```

Command Line Explanation (see Table 8-3):

Table 8-3. Import utility command line parameters for a single professional

Parameter	Description
Thomson.Westkm.ImportUtility.exe	The executable program that runs the utility.
NetworkID (required)	The member's ID used to log on to your organization's network, including the domain name.
CustomUserName	The name the user must type when signing on to West km.
CustomPassword	The password the user must type when signing on to West km.
WestlawID	The member's password to sign on to Westlaw Classic, including numbers and letters.
FullName (required)	The full name of the member you want to import.
FirstName (required)	The first name of the member you want to import.
MiddleName	The middle name of the member you want to import.
LastName (required)	The last name of the member you want to import.
IsActive	Specifies whether the member is active. Set to 1 or 0. The default value is 0 (not active).
IsAdmin	Specifies whether the member has rights to the West km Setup pages. Set to 1 or 0. The default value is 0 (not admin).
NovellID	The member's ID to log on to your organization's Novell network, provided in full context.
Update	Specifies if you want to update member information if the member already exists in the Professionals table. Set to 1 or 0. The default value is 1 (on).

8.4 Exporting Member Data

You can export data displayed in the Professionals table to a file of comma-separated values. You can then compile that data in another program, such as Excel, to analyze your West km member information in a more usable format.

To export data from the Professionals table to a file, complete these steps:

1. On the Professionals page, click **Export Professionals**.
2. In the File Download dialog box that is displayed, click **Save**.
3. In the Save As dialog box, navigate to the folder where you want to save the file, type a file name, and click **Save**.
4. In the Download Complete dialog box (if displayed), click **Close**.

The file contains the same data that is needed to create an input file (see “8.3.1 Creating an Input File” on page 89).

8.5 Setting a Document Security Level

By setting a document security level, you control the access that your active West km members have to your indexed documents. The security levels are based on the security implemented in your organization’s DMS.

You select a document security level using the Document Security Level setting at the Setup, System Options, Security Settings page. For details, see page 38.

9 Tracking Program Activity

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The following West km features provide a log of West km activity and allow you to monitor program processes and troubleshoot errors:

- Indexing statistics allow you to monitor indexing processes.
- The event viewer allows you to monitor program events.
- Trace logs allow you to gather information and troubleshoot program activity.
- The usage reporting feature allows you to track West km usage.

9.1 Monitoring Indexing Processes

You can monitor the progress of indexing, full-text indexing, and synchronization processes on the Statistics page. To access statistics for these processes, complete these steps:

1. Open Internet Explorer and go to *hostname/km/plhome.aspx*, where *hostname* is the name of your West km server on your network.
2. Click the **Setup** link and then choose **Statistics**.
3. Under *Type* on the Statistics page (Figure 9-1), click the link for the statistics you want to view:
 - **Indexing**
 - **Full Text**
 - **Sync**

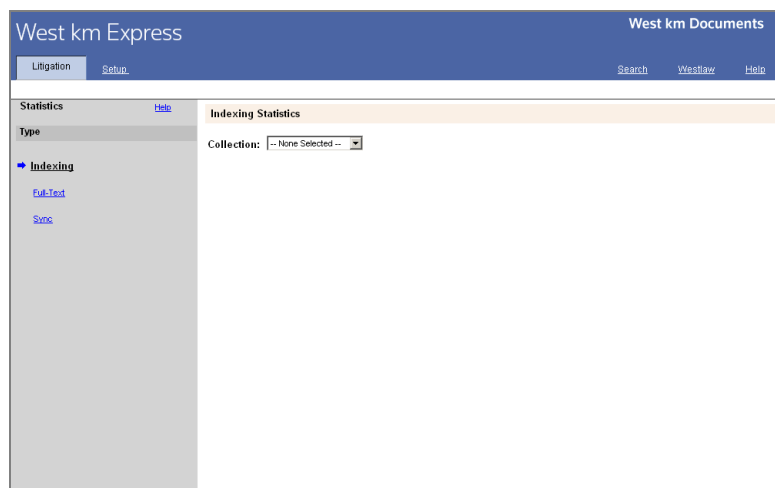


Figure 9-1. Statistics page

For more information about the statistics for each process, refer to the following subsections.

9.1.1 INDEXING

You can monitor the indexing progress of a document collection by following the steps below. Statistics are shown for both bulk indexing and incremental update processes, whether automatically or manually initiated.

1. On the Statistics page, click **Indexing**.
2. Choose the document collection for which you want to view indexing statistics from the *Collection* drop-down list. To view statistics for all document collections, choose **All Collections**.

Note You can also view indexing statistics for a document collection by clicking the collection's name on the Indexing Options page.

- The indexing statistics for documents in the selected document collection are displayed (Figure 9-2). If you want to update the statistics while the indexing process is running, click **Refresh**. (The page is not refreshed automatically.)

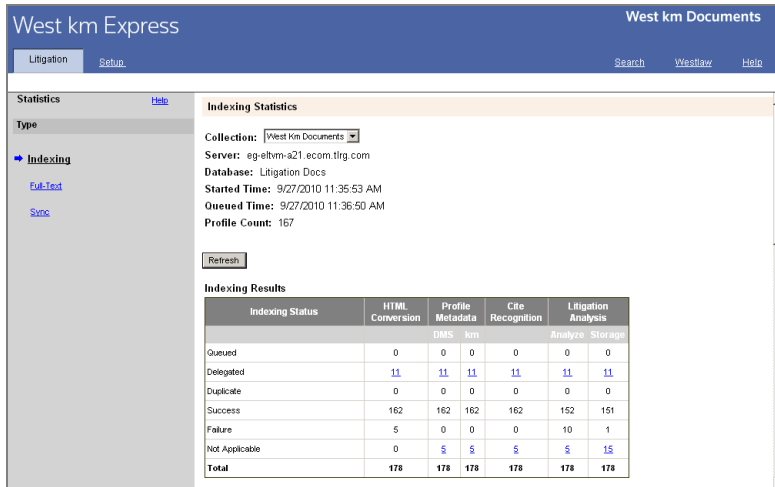


Figure 9-2. Statistics page, Indexing Statistics section

9.1.1.1 Understanding Indexing Statistics

The Statistics page provides information about the indexing results for a collection, including statistics for both successes and failures.

Collection Information

Table 9-1 lists the information that is provided in the page header of the Statistics page:

Table 9-1. Collection data on the Statistics page

Label	Description
Collection	The name of the document collection for which you are viewing indexing statistics. To view statistics for another document collection, choose the name from the drop-down list.
Server	The server containing the DMS documents in the document collection.
Database	The database containing the DMS documents in the document collection.
Started Time	The time the last indexing process started scheduling. The time is displayed as soon as the indexing process is started.
Queued Time	The time the last indexing process was scheduled. The time is displayed as soon as indexing is scheduled.
Profile Count	The number of document profiles in the document collection.

Note This count may be less than the count shown in the Total row in the Indexing Results table (and for your DMS saved search) if documents are duplicated in multiple collections and were previously processed by another (primary) document collection. These documents are accounted for in the Duplicate row in the Indexing Results table.

Indexing Results

The Indexing Results table shows the current indexing statistics for the selected document collection. For each indexing component, the number of documents at each status is indicated. Table 9-2 explains each status.

Table 9-2. Data in the Indexing Results table

This status	Shows how many documents in the collection
Queued	Are currently scheduled and remain to be processed.
Delegated	Are currently in process.
Duplicate	Have already been processed as part of another (primary) document collection; to monitor any secondary processing on the duplicate document, refer to the indexing statistics for the document's primary document collection.
Success	Have processed successfully.
Failure	Have not been processed because of errors.
Not applicable	Will not be processed because the component doesn't apply or a component on which it is dependent has failed.

Indexing Success Breakdown

The Indexing Success Breakdown table shows a breakdown of the current indexing statistics for the documents that successfully processed. For each indexing component, the number of documents at each status is indicated. Table 9-3 explains each status.

Table 9-3. Data in the Indexing Success Breakdown table

This status	Shows how many documents in the collection
Success	Have processed successfully.
Analyzer partial analysis	Have processed successfully, but a failure occurred in the analyzer component (Litigation) while identifying a specific entity, e.g., jurisdiction.
Identified as secured	Have not been processed because they are within a secured subfolder within an NTFS share.
Invalid document structure	Have not been processed because the document's structure doesn't allow the document analysis component to proceed with the analysis.
No cites - deleted ¹	Have been deleted from West km during synchronization because they have no citations.
No cites - pending deletion ¹	Have been scheduled to be deleted from West km because they have no citations; documents will be deleted during the next synchronization process.
RID partial error	Have processed successfully, but with an error in identifying citations with RID; at least one citation in each document was identified.
Unsupported file type	Have not been processed by the document analysis component because the document file is an unsupported file type—for example, an unsupported version of an application format that is supported in other versions by other components.
Work in progress	Have not been processed because they have been modified or added to the collection within the number of days set in the <i>Work in Progress Time Span</i> setting at Setup, System Options, Indexing Settings, General Settings.

1. When a document collection is set to index only documents that contain one or more citations (the **Citations Only** check box is selected for the collection), documents with no citations are deleted from West km during the synchronization process. A document is identified as having no citations after the document is converted to HTML and processed by the cite recognition component (RID).

Indexing Failure Breakdown

The Indexing Failure Breakdown table shows a breakdown of the current indexing statistics for the documents that failed processing. For each indexing component, the number of documents at each status is indicated. Table 9-4 explains each status.

Table 9-4. Data in the Indexing Failure Breakdown table

This status	Shows how many documents in the collection	Automatic reprocessing?
Analyzer failure	Have not been processed because of a failure for unknown reasons in the document analysis component or the analyzer component.	X
Analyzer initialization failure	Have not been processed because the analyzer component (Litigation) failed to initialize.	
Analyzer timeout	Have not been processed because the document analysis component or the analyzer component took longer than the specified timeout value of 60 minutes.	
Document size exceeded	Have not been processed because the documents exceed the maximum size of files allowed into West km. (The default threshold is 50 megabytes.)	
Full text abstraction failure	Have not been processed because the indexing service encountered a problem while communicating with the full-text searching service and could not copy or retrieve a document from the HTML storage location.	X
General error	Have not been processed because of a general failure.	X
HTML conversion error	Have not been processed because of a failure to convert them to HTML.	
Identified as corrupt	Have not been processed because they are corrupt.	
RID error	Have not been processed because of a failure in RID to identify citations; no citations in the documents were identified.	X
RID timed out	Have not been processed because RID failed to communicate for 120 seconds.	
Store is full	Have not been processed because the maximum was reached for your designated HTML document storage.	X
Unable to access file or physical file missing	Have not been processed because the document file could not be found.	
Well-formed conversion error	Have not been processed because the HTML conversion of the document does not conform to the syntax rules of XML.	

9.1.1.2 Viewing and Reprocessing Documents

To view a listing of documents for a particular indexing component and status, click a hyperlinked number in the Indexing Success Breakdown or the Indexing Failure Breakdown table.

Manual Reprocessing

When you view a listing of documents, you can choose to manually reprocess the documents. This option is useful if the documents failed and you want to reprocess them immediately.

To manually reprocess documents from the listing, complete these steps:

1. Select the check box preceding each document in the list that you want to reprocess. To select all documents in the list, select the **Select All** check box in the heading.
2. Click the reprocessing option you want in the *Tasks* list in the left frame. To reprocess the selected documents for all indexing components that have been set for that document collection, click

Reprocess All Components. Documents are rescheduled immediately, and indexing will start according to the collection's document indexing window.

Note If you reprocess the HTML conversion component, all components that have been set for that document collection will be reprocessed.

To search for a document within the component and status listing, type your search criteria in the appropriate text boxes at the top of the page and click **Go**. The matches that contain the text you typed are listed. (To display all documents within the component and status listing, clear any values in the text boxes and click **Go**.)

To return to the Statistics page, click **Return to Indexing Statistics**.

Automatic Reprocessing

If you don't manually reprocess documents, West km will attempt to reprocess documents in some status categories after six hours (360 minutes), as indicated by the value of the *indexer_ErrorReprocessThresholdMinutes* property in the Thomson.Westkm.IndexingService.exe.config file. Status categories that are reprocessed automatically by default are indicated in the *Automatic Reprocessing* column in the Indexing Success Breakdown and Indexing Failure Breakdown tables above.

Delegated documents can become "stranded" if they fail while in the delegated state but cannot be marked as failed. West km will attempt to reprocess stranded delegated documents after six hours (360 minutes), as indicated by the value of the *indexer_DelegatedReprocessThresholdMinutes* property in the Thomson.Westkm.IndexingService.exe.config file.

Note If the West km indexing service is stopped, all documents in the delegated state (included stranded delegated documents) will be rescheduled immediately when the service is restarted.

Reprocessing attempts continue at the set rate in relation to the last failed attempt until documents are indexed or until another indexing process is run and attempts to process the documents. At that point, the result of the most recent indexing process affecting the documents determines reprocessing attempts going forward.

Regardless of the result of a previous indexing process, the following occurs:

- During bulk indexing, all documents in the collection will be re-indexed.
- During an incremental update, documents in the collection will be re-indexed only if they are new or modified and have a date and time after the collection was last indexed. (New or modified documents with an earlier date and time will only be indexed if the *Sync New Docs In Incremental Update* setting is selected.)

Troubleshooting

To see more detailed information about West km indexing activity, for example, if several documents had errors, you can

- access the event log. For more information, see "9.2 Monitoring Program Events" on page 104.
- see the program trace logs. For more information, see "9.3 Using Trace Logs" on page 105.

9.1.2 SYNCHRONIZATION

You can monitor the progress of synchronization processes by clicking **Sync** on the Statistics page (Figure 9-3).

The screenshot shows the 'Sync Statistics' section of the West km Express interface. It features two tables:

Sync Counts:		Delete States	Count
Deleted from Synchronization with DMS			35
Deleted Manually from West km Interface			0

Sync Jobs:				
	Started	Completed	Deleted	Status
🕒	9/27/2010 7:04:40 AM	9/27/2010 7:14:41 AM	0	✓
🕒	9/26/2010 7:04:39 AM	9/26/2010 7:14:40 AM	0	✓
🕒	9/25/2010 7:04:38 AM	9/25/2010 7:14:39 AM	0	✓
🕒	9/24/2010 4:40:52 PM	9/24/2010 4:50:52 PM	0	✓
🕒	9/24/2010 12:00:51 AM	9/24/2010 12:00:51 AM	0	✓
🕒	9/23/2010 12:00:50 AM	9/23/2010 12:00:50 AM	0	✓
🕒	9/22/2010 12:00:49 AM	9/22/2010 12:00:49 AM	0	✓
🕒	9/21/2010 12:00:47 AM	9/21/2010 12:00:47 AM	0	✓
🕒	9/20/2010 12:00:47 AM	9/20/2010 12:00:47 AM	0	✓
🕒	9/19/2010 12:00:45 AM	9/19/2010 12:00:45 AM	0	✓

Figure 9-3. Statistics page, Sync Statistics section

The following statistics are provided on the Sync Statistics page.

Sync Counts

The Sync Counts table shows the cumulative number of documents that have been deleted from West km Express. Documents are deleted because they are in one of two states, which are explained in Table 9-5.

Table 9-5. Data in the Sync Counts table

Deleted from Synchronization with DMS	The total number of documents deleted from West km during synchronization processes. These include documents that were deleted from your organization’s file system, that were no longer part of a document collection, or that had no citations and were part of a document collections set to index only documents that contain one or more citations.
Deleted Manually from West km Interface	The total number of documents deleted from West km using the West km interface. For details, see “10.1 Deleting Documents” on page 118.


To view a listing of documents for a particular state, click a hyperlinked number in the Delete States table.

- To search for a document within the sync state listing, type your search criteria in the appropriate text boxes at the top of the page and click **Go**. The matches that contain the text you typed are listed.
- To return to the Sync Statistics page, click **Return to Sync Statistics**.

Sync Jobs

The Sync Jobs table lists synchronization processes that have run, including the date and time the job started, the date and time the job completed, the number of documents deleted, and the status of the job. The possible job status indicators are explained in Table 9-6.

Table 9-6. Job status indicators for the Sync Jobs table

	Successful
[blank]	Undetermined Synchronization could be in process, could have encountered a problem, or could have been stopped, e.g., West km services were stopped.

If the synchronization job is not successful, a blank entry in the *Completed* column of the Sync Jobs table could indicate that the synchronization process had a problem accessing a particular collection of documents.




To view more information about a synchronization job, click the **Detail Record** icon  next to its listing. The Active Document Verification Checks table is displayed. This table can be useful for monitoring synchronization jobs, because it lists the results of document verification by each collection. The possible collection status indicators are explained in Table 9-7.

Table 9-7. Job status indicators for the Active Document Verification Checks table

	Successful
SKIP	Skipped <ul style="list-style-type: none">• Synchronization was skipped because the <i>Skip Sync Process</i> option is selected for the collection; or• Synchronization was skipped because the number of documents marked for deletion matches the existing document count for the collection in West km Express. This logic prevents an entire collection of documents from being wrongly deleted if a DMS reports to West km that zero documents exist in a collection when documents actually do exist.¹
	Failure
[blank]	In Process or Stopped Synchronization of the collection is in process or the indexing service was stopped before it was able to finish.

1. Because of this logic, always have one active document indexed for each collection. If an active collection no longer contains any West km documents, delete the collection from West km Express to delete its documents.

To update the statistics while the synchronization process is running, click **Refresh**. (The page is not refreshed automatically.)

To return to the Sync Statistics page, click **Back**.

9.1.3 FULL-TEXT INDEXING

You can view full-text indexing statistics from the Statistics page. You can also view full-text indexing statistics and event logs from the HTML Storage page.

To view full-text indexing statistics, do one of the following:

- On the Statistics page, click **Full Text**.
- Click the **Setup** link and then choose **HTML Storage**. In the *Collections* section, click **Indexing Statistics**.

The Search Component Statistics table is displayed in the right frame (Figure 9-4).

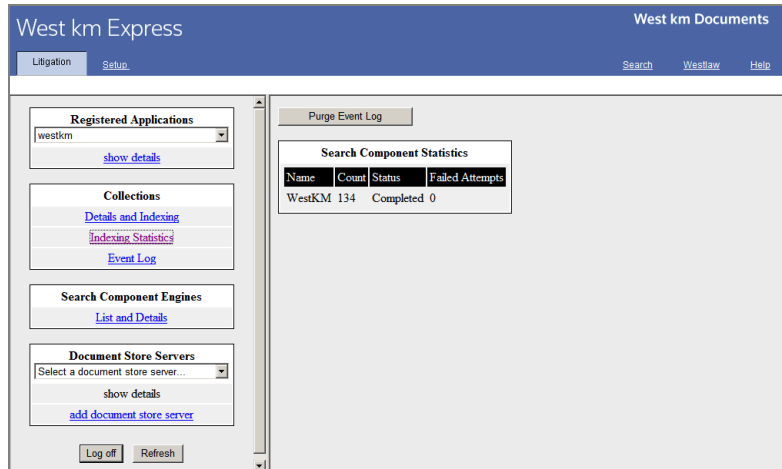


Figure 9-4. HTML Storage page, Search Component Statistics section

In the Search Component Statistics table, a storage collection is listed if its documents are queued, are processing, or have failed. A storage collection can be listed multiple times, depending on the document activity. If a storage collection is not listed, its document are not queued, not processing, or successful.

The Search Component Statistics table shows the data listed in Table 9-8:

Table 9-8. Data in the Search Component Statistics table

This column	Shows this data
Name	The name of the storage collection containing the documents to which the data applies.
Count	The number of documents scheduled, processing, completed, or failed. Documents to be deleted are counted.
Status	The indexing status of the documents—queued, processing, completed, or failed.
Failed Attempts	The number of times the search component has tried to process the documents.

To update the statistics while full-text indexing is running, click **Refresh** in the left frame. (Refresh is available only when statistics are accessed from the HTML Storage page.)

To view the full-text indexing event log, complete these steps:

1. Click the **Setup** link and then choose **HTML Storage**.
2. In the *Collections* section, click **Event Log**. The event log is displayed in the right frame (Figure 9-5).

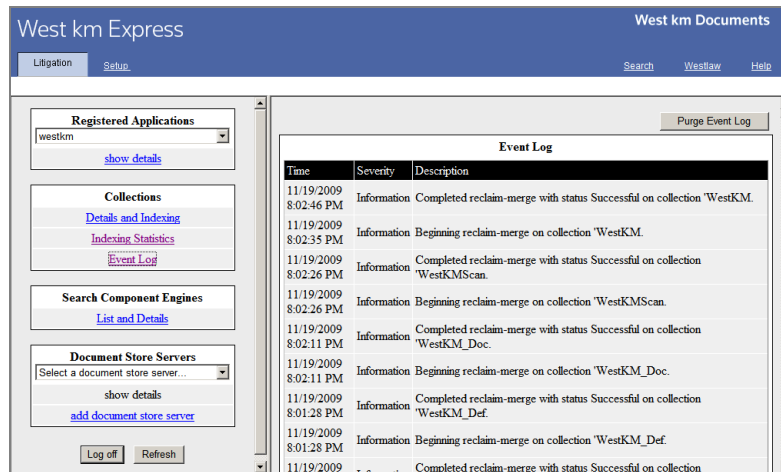


Figure 9-5. HTML Storage page, Event Log section

Information and error events are logged for these activities:

- full-text indexing
- reclaiming
- searching

Full-text indexing events are also logged in the Thomson West event viewer on the HTML repository/search server. For instructions on accessing the Thomson West event log, see the following section, “9.2 Monitoring Program Events.”

9.2 Monitoring Program Events

Events are logged in West km Express when significant milestones are reached during the indexing process or when an error occurs. Logging begins in the Thomson West event log when services are started. It records events for West km delivery, West km indexing services, the full-text searching service, and the document analysis service.

Events are categorized as information, warning, or error events. In particular, you should monitor the event viewer for error events, which indicate that a West km server component has failed a required function.

To access an event log, complete these steps:

1. On the appropriate server, click the **Start** button, choose **Administrative Tools**, and then choose **Event Viewer**.
2. In the Event Viewer window, click **Thomson West**. Events are listed in the right frame.
3. To view more information about an event, double-click it.

Informational Events

Following are activities that cause informational events to be logged:

- The West km indexing service is started.
- The West km indexing service is stopped.
- Indexing of a document collection is started.

- Indexing of a document collection is finished.

Warning Events

Following are activities that cause warning events to be logged:

- A West km server component fails to read its configuration property for starting one of the West km services.
- The processing of a document failed.
- A worker thread was aborted because it received a stop service command while processing a document. This could occur because West km didn't have rights to read the document or the document couldn't be found.
- The indexer encounters a corrupt document. This occurs when a document fails to be converted to HTML within the configured time-out. In this instance, the service will automatically restart.
- Search logic retrieves too many documents, the search criteria are invalid, or a time-out exception occurs.

Error Events

Error events are logged when West km failures occur. Failures could occur for these reasons:

- The West km indexing service fails to extract a collection of documents from the DMS for indexing.
- A critical thread within the service has failed and the service needs to be restarted to function properly.
- A thread responsible for processing a group of documents fails.
- One of the West km services fails to start.

9.3 Using Trace Logs

If you encounter error events in the event log, you can use trace logs to gather additional information about program activity, allowing you to troubleshoot problems more effectively. This logging occurs while West km services are running.

To view a trace log, go to the location designated in the trace file's associated configuration file and open the log file in Notepad.

9.3.1 TRACE LOG LISTING

Table 9-9 lists the trace logs you can access.

Table 9-9. Trace logs

West km Citation Service Trace Log	
Log File ¹	<i>[West km installation folder]\Logs\CitationService.log</i>
Description	Records activity on the West km Citation Service.
Configured in This File	Thomson.Westkm.CitationService.exe.config
West km Full-Text Search Trace Log	
Log File ²	<i>[Full-text search installation folder]\logs\West Search Service.log</i>
Description	Records activity on the West Full Text Searching service.
Configured in This File	Thomson.FTSearch.Server.exe.config

Table 9-9. Trace logs (continued)

West km HTML Conversion Service Trace Log	
Log File	<i>[West km installation folder]\Logs\HTMLConversionService.log</i>
Description	Records activity on the West km HTML Conversion Service.
Configured in This File	Thomson.Westkm.HTMLConversionService.exe.config
West km IIS Trace Log	
Log File	<i>[West km installation folder]\Logs\Thomson.Westkm.log</i>
Description	Records activity on the IIS Web server application, including end-user activity related to searching and citation checking (in the WestlawNext and Westlaw Classic interfaces and the West km interface) and activity on the setup pages.
Configured in This File	Web.config
West km Indexing Service Trace Log	
Log File	<i>[West km installation folder]\Logs\IndexingService.log</i>
Description	Records activity on the West km Indexing Service, including most of the indexing activity.
Configured in This File	Thomson.Westkm.IndexingService.exe.config
West km Monitor Service Trace Log	
Log File	<i>[West km installation folder]\Monitor\bin\monitor.log</i>
Description	Records activity on the West km Monitor Service.
Configured in This File	Thomson.Westkm.MonitorService.exe.config
West km Professionals Import Utility Trace Log	
Log File	<i>[West km installation folder]\Logs\ImportUtility.log</i>
Description	Records activity when importing West km members into the Professionals table.
Configured in This File	Thomson.Westkm.ImportUtility.exe.config
West km Worker Service Trace Log	
Log File	<i>[West km installation folder]\bin\Thomson.Westkm.WorkerService.log</i>
Description	Records activity on the West km Worker Service.
Configured in This File	Thomson.Westkm.WorkerService.exe.config
Analyzer Component Trace Logs	
Log File Folder ³	<i>[Analyzer component installation folder]\dexter_logs</i>
Description	dexter.log: Records all activity on the West km Analyzer Service. dextererror.log: Records errors on the West km Analyzer Service.
Configured in This File	<i>[Analyzer component installation folder]\Lib\log4j.properties</i>

1. The default installation folder for West km Express is [Drive]:\Program Files\Thomson\Westkm.

2. The default installation folder for full-text search is [Drive]:\Program Files\Thomson\FTSearch.

3. The default installation folder for the analyzer component is [Drive]:\Program Files\Thomson\Dexter.

9.3.2 WEST KM TRACE LOGS

For the West km trace logs, you can control the level of activity that is recorded, the name and path of the trace log, and the maximum size and maximum number of log files that are created.

Turn on the logs when necessary, view the log files, and then turn off the logs when you are finished troubleshooting. Because trace logs increase in size quickly, be sure to turn them off as soon as you are finished troubleshooting.

To access and change trace log settings, complete these steps:

1. Open the configuration file (listed in the previous section) in Notepad for the trace log you want to adjust.

For the servers and locations associated with configuration files, see “4.5.1 Configuration Files” on page 46.

2. To set the tracing level, locate the *level* property in the log4net section (root subsection), in the configuration file and change the value to correspond to the activity you’d like to record in the trace log. For example,

```
<log4net>
...
  <root>
    <level value="OFF" /> <!--To switch on log change the level
      value to "ALL"-->
    <appender-ref ref="Log4NetFileAppender" />
  </root>
</log4net>
```

Values are listed in Table 9-10.

Table 9-10. Trace log values

Tracing Value
OFF (no tracing is logged)
FATAL
ERROR
WARN
INFO
DEBUG
ALL (all tracing is logged)

When you set a tracing level (e.g., WARN), it covers all higher levels of tracing as well (i.e., WARN, ERROR, and FATAL).

3. To change the location and name of a trace log, locate the *file* property in the log4net section in the configuration file and change the path and file name. For example,

```
<log4net>
...
  <file value="D:\program
    files\thomson\westkm\logs\IndexingService.log" />
```

4. By default, 20 is the maximum number of files that can be created when a log file reaches its maximum size. To change the maximum number of files, change the value of the *maxSizeRollBackups* property in the log4net section.

```
<maxSizeRollBackups value="20" />
```

As additional log files are created, an integer is added to its name, e.g., IndexingService.log.1. The original file name, e.g., IndexingService.log is always the most current file, and the highest numbered file the oldest. After the sequence reaches the maximum, the oldest file is deleted.

5. By default, 50 megabytes is the maximum size a log file is allowed to reach before being rolled over to backup files. To change the maximum file size, change the value of the *maximumFileSize* property in the log4net section, appending the letters "KB", "MB", or "GB" so that the size is interpreted respectively in kilobytes, megabytes, or gigabytes.

```
<maximumFileSize value="50MB" />
```

6. Save the configuration file.
7. Stop and then start the associated West km service for the configuration file. (For details on starting services, see "2.2.4 Verifying Services Are Started" on page 18. For details on configuration files, see "4.5 Changing Property Settings" on page 46.)

9.3.3 ANALYZER COMPONENT TRACE LOGS

For the analyzer component trace log, you can control the level of activity that is recorded, plus the name and path of the trace log.

Turn on the logs when necessary, view the log files, and then turn off the logs when you are finished troubleshooting.

Note Because trace logs increase in size quickly, be sure to turn them off as soon as you are finished troubleshooting.

To access and change trace log settings for the analyzer component, complete these steps:

1. Open the log4j.properties configuration file in Notepad.
2. Locate the *Loggers* section in the configuration file.
3. Depending on the trace log you want to affect, change the value to another value option: *off*, *debug*, *error*, *fatal*, *warn*, *info*, or *all*.

```
log4j.logger.dexter=off, dexterloggingfile  
log4j.logger.error=off, dextererrorfile
```

4. To change the location and name of trace logs, locate these properties and change the path and file name.

```
log4j.appender.dexterloggingfile.File=dexter_logs/dexter.log  
log4j.appender.dextererrorfile.File=dexter_logs/dextererror.log
```

5. Save the log4j.properties configuration file.
6. Stop and then start the West km Analyzer Service.

9.4 Reporting on Usage

You can track, query, print, export, and archive your organization's West km usage data. Usage data includes the type and date of the West km document transaction and the related West km client ID (for billing allocation) and document number.

To access the Usage Reporting page to view West km usage data for your organization, complete these steps:

1. Open Internet Explorer and go to *hostname/km/plhome.aspx*, where *hostname* is the name of your West km server on your network.
2. Click the **Setup** link and then choose **Usage Reporting**.
3. Click the report you want to view in the *Summary Reports* list in the left frame, e.g., **Detailed Report**.

- To display your usage data, enter your criteria in the text boxes at the top of the Usage Reporting page (Figure 9-6) and click **Go**. For details, see the following subsection, “9.4.1 Querying Usage Data.”

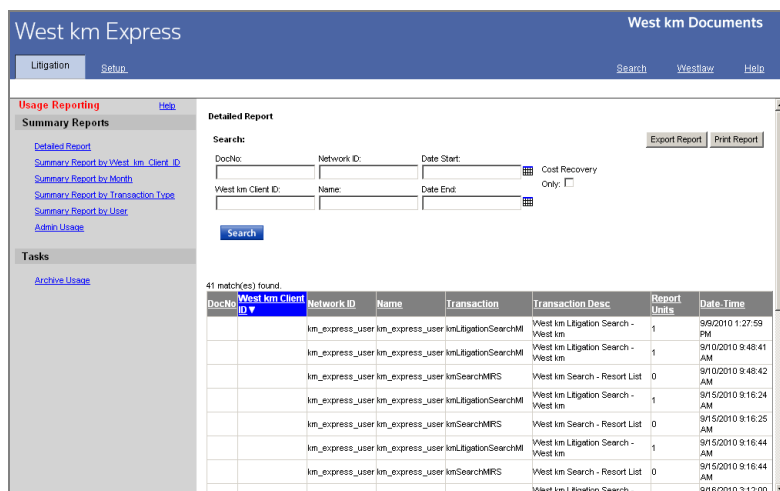



Figure 9-6. Usage Reporting page

9.4.1 QUERYING USAGE DATA

To query your usage data, enter your criteria in the text boxes at the top of the Usage Reporting page for the report you are viewing and click **Go**. The transactions that match your criteria are displayed in the usage reporting table. (For a description of usage transactions, see “9.4.4 Understanding Usage Transactions” on page 112.)

- For the document number and West km client ID criteria, transactions whose values start with the letters you type will be found.
- For network ID, custom username, and name criteria, transactions whose values contain the letters you type will be found.
- For the date criteria, click the **Calendar** icon , click a date, and click **OK**.
- If you select the **Cost Recovery** check box, transactions that are most pertinent to cost recovery purposes are retrieved. Transactions designated for cost recovery purposes are indicated with a **Y** in the *Cost Recovery Y/N* column in the table in section “9.4.4 Understanding Usage Transactions” on page 112.

To retrieve all usage transactions, clear any values in the text boxes and click **Go**.

To print the usage transactions you have retrieved, click **Print Report**.

To export data for the retrieved usage transactions to a file of comma-separated values, click **Export Report**. For more information, see the following section, “9.4.2 Exporting Usage Data.”

9.4.2 EXPORTING USAGE DATA

You can export data for the retrieved usage transactions to a file of comma-separated values. You can then open and compile that data in another program, such as Microsoft Excel, to create customized usage reports for your organization.

To export usage data, complete these steps:

- Click **Export Report** in the right frame of a displayed usage report.
- In the File Download dialog box that is displayed, click **Save**.

3. In the Save As dialog box, navigate to the folder where you want to save the file, type a new file name if you want to change the name, and click **Save**.

By default, the file name contains the date to prevent overwriting of previously exported data and for easy retrieval.

4. In the Download Complete dialog box (if displayed), click **Close**.

The usage data that is exported for the Detailed Report includes the following:

- Document number
- West km client ID
- User's last name
- User's first name
- User's Westlaw password (numeric portion only)
- Transaction
- Transaction description
- Report units
- Date
- Time
- Library groups searched (for transactions involving search)
- Network ID or username (depending on your authentication method)
- Domain
- West km session ID (used for troubleshooting)
- Search transaction ID (used for error reporting)
- Query (for transactions involving KeyCite and search)

The usage data that is exported for the other reports corresponds to the data that is displayed on-screen.

If you intend to compile the data in Microsoft Excel, you can import the data in two ways:


- To open the data file and convert it automatically, use the Open command in Excel (from the File menu, choose **Open**).
- To open the data file using the Text Import Wizard, use the Import Data command in Excel (from the Data menu, choose **Import External Data**, and then choose **Import Data**). The wizard provides additional flexibility and options before converting the file. For example, you can choose not to import (skip) columns you don't need.

Note The data files are delimited with commas.

If you would like assistance in compiling your organization's usage data, call your West km representative at 1-888-WESTKM1.

9.4.3 ARCHIVING USAGE DATA

To purge usage data from the West km system and save it to another location, complete these steps:

1. Click **Archive Usage** in the *Tasks* list in the left frame of the Usage Reporting page.
2. On the Archive Usage page (Figure 9-7), enter a date in the *Date End* text box. To enter a date, click the **Calendar** icon , click a date, and click **OK**. The date you enter, along with the value in the *Date Start* text box, creates a date range of data to be archived.

The Date Start reflects the oldest usage data and cannot be modified.

3. To retrieve the usage data you want to archive, click **Go**.
4. Click **Create Archive**.
5. At the warning message, click **OK**.
6. In the File Download dialog box that is displayed, click **Save**.

7. In the Save As dialog box, navigate to the folder where you want to save the file, type a new file name if you want to change the name, and click **Save**.
8. In the Download Complete dialog box (if displayed), click **Close**.

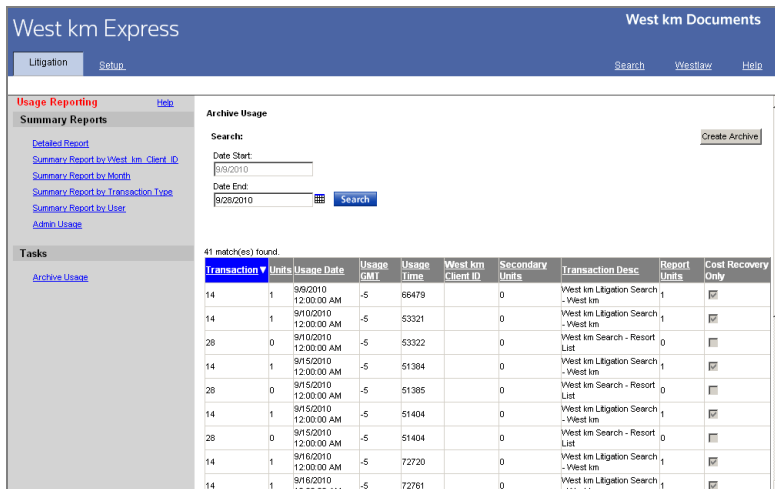


Figure 9-7. Archive Usage page

For back-up purposes, a copy of the archive file is also saved on the West km server. It is saved in the Reports subfolder of the installation folder, e.g., D:\Program Files\Thomson\Westkm\Reports.

To view the archive history, click **Admin Usage** in the left frame of the Usage Reporting page, select **Archiving** from the *Type of Usage* drop-down list, and run the report. Table 9-11 lists the information that is tracked:

Table 9-11. Tracked archive history

Item Tracked	Description
Date-Time	The date and time archiving occurred.
Name	The person who performed the archiving activity.
Description	An explanation of the activity performed (i.e., archiving).
Usage Detail: FilePath	The path and file name to a back-up location of the archive file on the West km server from which the data was archived. To open or save a copy of the back-up file, click the link.
Usage Detail: MachineName	The machine name of the West km server from which the data was archived.
Usage Detail: UsageTimeSearch	The starting date from which usage data was archived.
Usage Detail: UsageTimeSearchEnd	The ending date at which usage data was archived.

9.4.4 UNDERSTANDING USAGE TRANSACTIONS

Table 9-12 lists the types of transactions that are tracked in the usage reporting table. A transaction is tracked for each individual activity performed.

Table 9-12. Usage transactions

Code ¹	Usage Transaction	Explanation	Cost Recovery	
			Y/N	Transaction Description
KeyCite				
46	kmKcFlagsMI	In the West km interface, the user clicks a document link and views an HTML representation of a document that contains KeyCite status flags	Y	West km Insert KeyCite Flags - West km
48	kmKcFlagsWL	In the WestlawNext or Westlaw Classic interface, the user clicks a document link and views an HTML representation of a document that contains KeyCite status flags	Y	West km Insert KeyCite Flags - Westlaw
131	kmKeyCiteCountWL	In the WestlawNext or Westlaw Classic interface, the user views a document and West km citing documents are found for that document	Y	West km KeyCite - Westlaw
12	kmKeyCiteMI	On the Litigation tab, the user searches for a citation recognized by RID	Y	West km KeyCite - West km
13	kmKeyCiteWL	In the WestlawNext or Westlaw Classic interface, the user views West km citing documents	Y	West km KeyCite - Westlaw
24	kmKeyCiteMIIMTask	On the Litigation tab, a document is deleted so that the KeyCite result list needs to be refreshed	N	West km Information Manager Update - Refresh KeyCite
56	kmKeyCiteMIL	The user links from a West km KeyCite result in the Westlaw Classic interface to the West km interface using the More Information link	N	West km KeyCite More Information Link - Westlaw
27	kmKeyCiteMIRS	On the Litigation tab, the user re-sorts the result list for a currently displayed KeyCite result	N	West km KeyCite - Resort List
View Document				
47	kmViewLitigationDocMI	On the Litigation tab, the user clicks a document link and views an HTML representation of a document	Y	West km Open Litigation Doc - West km
49	kmViewLitigationDocWL	In the WestlawNext or Westlaw Classic interface, the user clicks a document link and views an HTML representation of a document	Y	West km Open Litigation Doc - Westlaw

Table 9-12. Usage transactions (continued)

Code ¹	Usage Transaction	Explanation	Cost Recovery	
			Y/N	Transaction Description
Load Copy of Document				
52	kmLoadCopyLitigationMI	On the Litigation tab, the user loads a copy of a native document, which is copied to the server from the source location and displayed in its original format	Y	West km Open Litigation Doc in Word Processor - West km
53	kmLoadCopyLitigationWL	In the WestlawNext or Westlaw Classic interface, the user loads a copy of a native document, which is copied to the server from the DMS and displayed in its original format	Y	West km Open Litigation Doc in Word Processor - Westlaw
Print Document/List				
42	kmPrintLitigationDocsMI	On the Litigation tab, the user prints one or more documents using the Print command	Y	West km Print Litigation Documents - West km
44	kmPrintLitigationDocsWL	In the WestlawNext or Westlaw Classic interface, the user prints one or more documents using the Print command	Y	West km Print Litigation Documents - Westlaw
43	kmPrintLitigationListMI	On the Litigation tab, the user prints a result list using the Print command	Y	West km Print Litigation List - West km
45	kmPrintLitigationListWL	In the WestlawNext or Westlaw Classic interface, the user prints a result list using the Print command	Y	West km Print Litigation List - Westlaw
E-Mail Document/List				
86	kmEmailLitigationDocsMI	On the Litigation tab, the user e-mails a document to someone else	N	West km Email Litigation Documents - West km
87	kmEmailLitigationDocsWL	In the WestlawNext or Westlaw Classic interface, the user e-mails a document to someone else	N	West km Email Litigation Documents - Westlaw
Search				
14	kmLitigationSearchMI	On the Litigation tab, the user searches with a full-text query	Y	West km Litigation Search - West km
61	kmLitigationSearchFirmOnlyWL	In the WestlawNext or Westlaw Classic interface, the user performs a full-text West km search only on the organization's documents; the search completes and results are viewed	Y	West km Local Litigation Search - Westlaw

Table 9-12. Usage transactions (continued)

Code ¹	Usage Transaction	Explanation	Cost Recovery	
			Y/N	Transaction Description
60	kmLitigationSearchFederatedWL	In the WestlawNext interface, the user performs a full-text search for Westlaw documents that also retrieves West km documents In the Westlaw Classic interface, the user performs a full-text search on both West km documents and Westlaw documents	Y	West km Federated Litigation Search - Westlaw
25	kmSearchMIIMTask	On the Litigation tab, a document is deleted from a search result	N	West km Information Manager Update - Refresh Search Result
57	kmSearchMIL	The user links from a full-text West km search result in the Westlaw Classic interface to the West km interface using the More Information link	N	West km Search More Information Link - Westlaw
28	kmSearchMIRS	On the Litigation tab, the user re-sorts the result list for a currently displayed search result	N	West km Search - Resort List
130	kmViewResultListFederatedWL	In the WestlawNext interface, after the user performs a full-text search on both West km documents and Westlaw documents, the West km results are viewed	N	West km Federated Litigation Search - Westlaw
View Summary				
50	kmLitigationDocSummaryMI	On the Litigation tab, the user views a document summary	N	West km Open Litigation Summary - West km
51	kmLitigationDocSummaryWL	In the WestlawNext or Westlaw Classic interface, the user views a document summary	N	West km Open Litigation Summary - Westlaw
Limits and Locate				
30	kmKeyCiteLimitsMI	On the Litigation tab, the user restricts his or her West km KeyCite results using Limits	N	West km KeyCite Limits - West km
31	kmKeyCiteLimitsWL	In the WestlawNext or Westlaw Classic interface, the user restricts his or her West km KeyCite results using Limits or Filters	N	West km KeyCite Limits - Westlaw
32	kmKeyCiteLocateMI	On the Litigation tab, the user restricts his or her West km KeyCite results using Locate	N	West km KeyCite Locate - West km

Table 9-12. Usage transactions (continued)

Code ¹	Usage Transaction	Explanation	Cost Recovery	
			Y/N	Transaction Description
33	kmKeyCiteLocateWL	In the WestlawNext or Westlaw Classic interface, the user restricts his or her West km KeyCite results using Locate or the Search within Results feature	N	West km KeyCite Locate - Westlaw
34	kmSearchLimitsMI	On the Litigation tab, the user restricts his or her West km search results using Limits	N	West km Search Limits - West km
35	kmSearchLimitsWL	In the WestlawNext or Westlaw Classic interface, the user restricts his or her West km search results using Limits or Filters	N	West km Search Limits - Westlaw
36	kmSearchLocateMI	On the Litigation tab, the user restricts his or her West km search results using Locate	N	West km Search Locate - West km
37	kmSearchLocateWL	In the WestlawNext or Westlaw Classic interface, the user restricts his or her West km search results using Locate or the Search within Results feature	N	West km Search Locate - Westlaw

1. The codes are associated with usage types in the ProfileUsage table in the West km database. For example, codes could be used to extract usage data directly from the table and to import select codes into your organization's billing system.

The *Report Units* column is displayed in the usage reporting table and is contained in exported reports. This column indicates the number of countable transactions at the document level. For example, if the transaction kmPrintLitigationDocsMI or kmPrintLitigationDocsWL indicates a unit number of 5, then five documents were printed. If kmInsertFlags indicates a unit number of 1, then KeyCite status flags were inserted in one word-processing document.

9.5 Reporting on Administrative Changes

You can track, print, and export the changes that have been made to the system by your organization's West km administrators. Data includes the name of the person who made the change, the date, and a detailed description of the change.

To access the administrator usage reports, complete these steps:

1. Open Internet Explorer and go to *hostname/km/pldefault.aspx*, where *hostname* is the name by which your West km server is known on your network.
2. Click the **Setup** link and then choose **Usage Reporting**.
3. Click **Admin Usage** in the left frame.
4. Enter your criteria in the text boxes at the top of the Admin Usage page.
 - For the date criteria, click the **Calendar** icon, click a date, and click **OK**.
 - If you select an option other than *All* from the Type of Usage and Specific Usage drop-down lists, administrative changes applying to those categories are retrieved. For a description of the usage types, see Table 9-13.
5. Click **Search**. The administrative changes that match your criteria are displayed in the admin usage table.

To retrieve all changes, clear any values in the text boxes and click **Search**.

To print the list of changes you have retrieved, click **Print Report**.

To export data the data you have retrieved to a file of comma-separated values, click **Export Report**. For details, see “9.4.2 Exporting Usage Data” on page 109.

Table 9-13. Usage Types for Administrative Changes

Type of Usage	Description
DMS Connection	A data source connection is added, changed, or deleted.
Indexing Options	Indexing of a document collection is manually launched, or a document collection is added or edited.
Indexing Server	Any of the following changes to the setup of the indexing server: <ul style="list-style-type: none">• the temp directory is updated• a server is added or deleted• a service window is added, edited, or deleted• an indexing component is suspended• the “process by component” option is changed for an indexing component
Upload Files	A file is added, removed, or uploaded in the West km Web-hosted application.
Professionals	A West km professional profile is added or edited, or the list of professionals is exported.
Archiving	Usage data is purged from the West km system and saved to another location.
System Options	A value is changed for a system option.
Update Versions	The product key is changed or the version of a West km software component is changed due to an upgrade.
Hidden Options	A value is changed for a system option that is accessible only by West km Technical Support.

10 Maintaining West km Express

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10.1 Deleting Documents

As an administrator in West km Express, you can permanently delete one or more documents from the system using the West km interface.

You should delete no more than 10 documents at a time via the West km interface because it is time consuming. The preferred method is to remove documents from West km by either deleting the documents from your organization's file system or by modifying your defined document collections to exclude the documents.

Note When you delete documents via the West km interface, they cannot be re-added to West km Express unless you add a new data source connection and define and index a document collection containing that document.

To delete documents from West km Express, complete these steps:

1. In the West km interface, generate a result list of your organization's documents.
2. In the result list, select the check box preceding each document you want to delete from West km Express. To select all documents in the result list, click **Select All** at the top of the result list.
3. Click **Result Options** at the bottom of the page and then click **Delete Selected Documents from West km**.
4. At the confirmation message, click **OK**.

The document is deleted immediately from West km Express. To see a count and listing of all documents that have been deleted from West km Express, access the Sync page at Setup, Statistics. For details, see "9.1.2 Synchronization" on page 101.

10.2 System Maintenance

For optimal performance and as a standard precaution, it is recommended that you observe the following best practices for maintaining your West km system. In the event of a conflict with your organization's established best practices, adhere to your own best practices.

Table 10-1 lists West km-specific best practices for maintenance.

Table 10-1. West km-specific best practices

Task	Frequency	West km Location
Verify incremental indexing	Daily (or based on service window settings)	Setup, Statistics, Indexing
Verify synchronization	Daily (or based on service window settings)	Setup, Statistics, Sync
Verify full-text indexing builds	Daily (or based on service window settings)	Setup, Statistics, Full-Text
Monitor West km logs in the event viewer for any errors or issues	Daily	Computer Management, Event Viewer, Thomson West
Add and modify users	As needed	Setup, Professionals
Verify the core functionality of West km Express (e.g., document retrieval by citation, term searching, WestlawNext or Westlaw Classic integration)	Weekly	Run searches in the WestlawNext or Westlaw Classic interfaces and West km interface.

Table 10-2 lists general maintenance best practices.

Table 10-2. General maintenance best practices

Task	Frequency
Monitor the system, security, and application event viewers for errors.	Daily
Back up and monitor SQL databases.	Daily
Back up files. As well as West km databases, back up the following West km items: <ul style="list-style-type: none"> • documents in the HTML storage locations • index files of the search component • West km installation folder and all subfolders Backups of the databases, the HTML storage locations, and the index files must be synchronized. To ensure data integrity, you must restore these items from backups with the same date and time. <p>It is also recommended that you perform complete system backups that include the registry and file system in the event of a hard disk failure.</p>	Daily
Optimize SQL by performing the following SQL database maintenance tasks: <ul style="list-style-type: none"> • check database integrity • rebuild indexes • update statistics When setting up database maintenance operations for West km databases, observe these guidelines: <ul style="list-style-type: none"> • Begin weekly maintenance after you initially index your document collections. • Perform maintenance operations after indexing a large number of documents with the document analyzer. • Do not perform maintenance operations while indexing, synchronization, or full-text indexes processes are running. (Therefore, schedule database maintenance outside the indexing service windows for the document indexing window and the document sync window and outside the indexing time windows in the full-text searching service.) 	Weekly
Verify data backups. Restore backups to a test system to ensure your backup strategy and restores will work when needed.	Monthly
Monitor and install patches.	Weekly
Monitor disk space to ensure you have adequate space on all drives. The recommended level is at least 25 percent free space.	Weekly

Table 10-2. General maintenance best practices (continued)

Task	Frequency
<p>Defragment disk drives as follows (from Microsoft).</p> <ul style="list-style-type: none"> • Analyze before defragmenting a volume Analyze volumes before defragmenting them. After analyzing a volume, a dialog box tells you the percentage of fragmented files and folders on the volume and recommends whether to defragment the volume. Analyze volumes regularly and defragment them only when Disk Defragmenter recommends it. A good guideline is to analyze volumes at least once a week. If you seldom need to defragment volumes, analyze volumes monthly instead of weekly. • Analyze after large numbers of files are added Volumes might become excessively fragmented when users add a large number of files or folders, so be sure to analyze volumes after this happens. Generally, volumes on busy file servers should be defragmented more often than those on single-user workstations. • Ensure that your volume has at least 15 percent free space A volume must have at least 15 percent free space for Disk Defragmenter to completely and adequately defragment it. Disk Defragmenter uses this space as a sorting area for file fragments. If a volume has less than 15 percent free space, Disk Defragmenter will only partially defragment it. To increase the free space on a volume, delete unneeded files or move them to another disk. Defragment during low-usage periods. • Defragment during low-usage periods Defragment file server volumes during low-volume usage periods to minimize the effect that the defragmentation process has on file server performance. The time that Disk Defragmenter takes to defragment a volume depends on several factors, including the size of the volume, the number of files on the volume, the number of fragmented files, and available system resources. • Defragment after installing software or installing Windows Defragment volumes after installing software or after performing an upgrade or clean install of Windows. Volumes often become fragmented after installing software, so running Disk Defragmenter helps to ensure the best file system performance. 	Weekly
Assess any environment changes (e.g., DMS updates, network changes, server updates) that may impact West km Express.	As needed
Check for West km updates and upgrade the system if needed.	Quarterly

10.3 SQL Server Express Maintenance

If you are using Microsoft SQL Server Express to house your West km databases, we recommend that you maintain them as follows for optimal performance and as a standard precaution.

10.3.1 THE SQL MAINTENANCE SCRIPT

Your installation of West km Express comes with a SQL maintenance script¹ that performs standard maintenance in Microsoft SQL Server Express and backups of your West km databases.

The SQL maintenance script is located on your West km server at

[West km installation folder]\DB\SQL Maintenance.sql

You can run the script manually or set up a scheduled task to automate its execution on a regular schedule.

1. This script is not supported by West km Express or any partners. No warranties, expressed or implied, are given. It has been offered in good faith and any consequential damage due to its use is the sole responsibility of the user.

10.3.2 AUTOMATING THE SQL MAINTENANCE SCRIPT

To automate the SQL maintenance script, formulate a statement to run the script using the sqlcmd utility and then create a scheduled task to execute the statement.

Step 1: Formulate a statement to run the script using the sqlcmd utility

Following is an example of a sqlcmd statement that runs the script. For your use, you may need to change the location of the SQL Maintenance.sql file and the output location.

```
sqlcmd -U -P password -S .\SQLEXPRESS  
-i "D:\ProgramFiles\Thomson\Westkm\DB\SQL Maintenance.sql"  
-o "D:\ProgramFiles\Thomson\Westkm\DB\SQL Maintenance.log"
```

The syntax is as follows:

```
-U login_id  
-P password  
-S server_name [ \ instance_name ]  
-i input_file  
-o output_file
```

Step 2: Create a scheduled task to execute the sqlcmd statement on your West km server

Complete these steps on your West km server to set up a scheduled task:

1. To open Task Scheduler, click the **Start** button, choose **Settings**, choose **Control Panel**, and then double-click **Scheduled Tasks**.
2. Right-click inside the Scheduled Task window, choose **New**, and then click **Scheduled Task**.
3. Type a name for the new task (e.g., **km_sql_maintain**) and press ENTER.
4. Right-click the new task and choose **Properties**.
5. In the Properties dialog box, do the following on the Task tab (Figure 10-1):
 - a. In the **Run** text box, type your sqlcmd statement from step 1.
 - b. In the **Run As** text box, type a user account to run the task.
 - c. Click **Set Password** and enter the user's password.

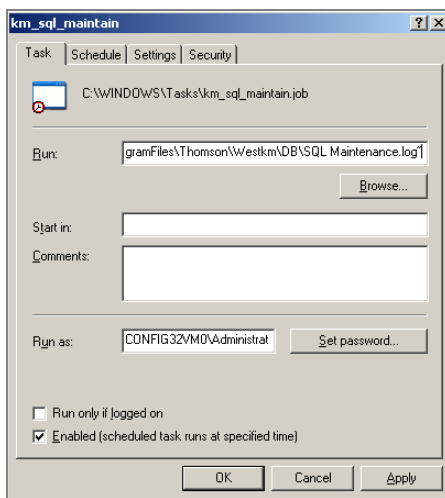


Figure 10-1. Scheduled Task Properties: Task tab

6. Click the **Schedule** tab and set a frequency and a start time for the task to run (Figure 10-2).

It is recommended that you run the script weekly or more, depending on your database size and backup needs.

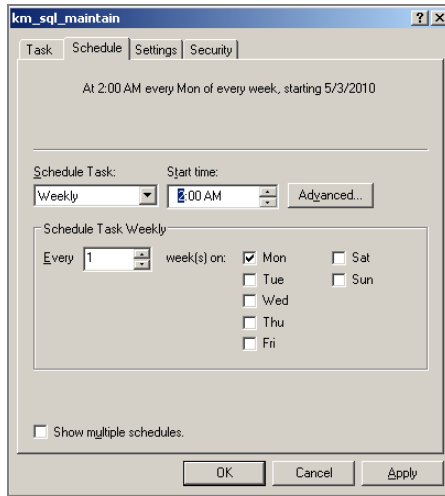


Figure 10-2. Scheduled Task Properties: Schedule tab

Click **OK**.

11 Removing West km

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11.1 Removing West km Software Components

You can remove West km software components in any order, except the West km Installation Wizard must be removed last.

11.1.1 SEARCH COMPONENT

To remove the search component software, complete these steps:

1. Click the **Start** button, choose **Control Panel**, and then double-click **Add or Remove Programs**.
2. Select **NovusOEM** and click **Change/Remove**.
3. In the Confirm Uninstall dialog box, click **OK**.
4. In the Maintenance Complete dialog box, click **Finish**.

The results of the installation are logged to *[search component installation folder]\Thomson\novus\logs\novusoem_uninstall.YYYYMMDD_HHMMSS.log*.

Additional third-party software that was installed as part of the search component (i.e., Microsoft WSE, Microsoft .NET Framework) is not removed with the search component. If you wish to remove this software, do so separately using Add or Remove Programs in the Control Panel.

In addition, you need to delete the index files of the search component separately.

11.1.2 FULL-TEXT SEARCH

To remove the full-text search software, complete these steps:

1. Click the **Start** button, choose **Control Panel**, and then double-click **Add or Remove Programs**.
2. Select **West Full Text Service** and click **Change/Remove**.
3. At the InstallShield Wizard confirmation prompt, click **Yes**.
4. In the Uninstall Complete dialog box, click **Finish**.

11.1.3 WEST KM

To remove the West km software, complete these steps:

1. Click the **Start** button, choose **Control Panel**, and then double-click **Add or Remove Programs**.
2. Select **Westkm** and click **Change/Remove**.
3. At the InstallShield Wizard confirmation prompt, click **Yes**.
4. In the Uninstall Complete dialog box, click **Finish**.

Additional third-party software that was installed as part of the West km server installation (i.e., Microsoft WSE, Sun Java Runtime Environment) is not removed with West km. If you wish to remove this software, do so separately using Add or Remove Programs in the Control Panel.

In addition, the Westkm folder will not be removed; it will contain iManage .dll files and West km log files. The config_backup subfolder will contain backup copies of West km configuration files.

11.1.4 WEST KM RID

To remove West km RID software, complete these steps:

1. Click the **Start** button, choose **Control Panel**, and then double-click **Add or Remove Programs**.
2. Select **West km RID** and click **Change/Remove**.
3. At the InstallShield Wizard confirmation prompt, click **Yes**.
4. In the Uninstall Complete dialog box, click **Finish**.

11.1.5 ANALYZER COMPONENT

To remove the analyzer component (Litigation) software, complete these steps:

1. Click the **Start** button, choose **Control Panel**, and then double-click **Add or Remove Programs**.
2. Select **West km Analyzer Component** and click **Change/Remove**.
3. At the InstallShield Wizard confirmation prompt, click **Yes**.
4. In the Uninstall Complete dialog box, click **Finish**.

11.1.6 WEST KM INSTALLATION WIZARD

Remove the West km Installation Wizard only after you have removed all other West km software components. To remove the installation wizard, complete these steps:

1. Click the **Start** button, choose **Control Panel**, and then double-click **Add or Remove Programs**.
2. Select **West km Installation Wizard** and click **Change/Remove**.
3. At the InstallShield Wizard confirmation prompt, click **Yes**.
4. In the Uninstall Complete dialog box, click **Finish**.

11.2 Removing West km Databases

To remove the West km database, West km RID database, full-text searching database, and search component databases in Microsoft SQL Server, complete these steps:

1. Click the **Start** button, choose **All Programs**, choose **Microsoft SQL Server 2005**, and then choose **SQL Server Management Studio**.
2. In the Connect to Server dialog box, verify the default settings, and then click **Connect**.
3. In the *Object Explorer* section of the SQL Server Management Studio window, connect to the SQL server that contains the West km databases you want to delete.
4. Expand the **Databases** folder.
5. Under the Databases folder, right-click the name of the West km database you want to delete and choose **Delete**.

Recommended Database Name	West km Database
CCI	Search Component–CCI
Doc	Search Component–Doc
FTSearch	Full-Text Search
km	West km
kmRID	West km RID
Persist	Search Component–Persist

6. Repeat step 5 for each West km database.
7. In the *Object Explorer* section, expand the **Security** folder under the server name and click **Logins**.
8. On the Summary tab in the right frame, right-click **kmuser** and choose **Delete**.
9. Close the SQL Server Management Studio window.

11.3 Removing the Web Share Virtual Directory

To remove the Web share virtual directory for West km, complete these steps:

1. Click the **Start** button, choose **Programs**, choose **Administrative Tools**, and then choose **Internet Information Services (IIS) Manager**.
2. In the Internet Information Services (IIS) Manager window (Figure 11-1), expand the server name in the left frame, and then expand **Web Sites** and **Default Web Sites**.

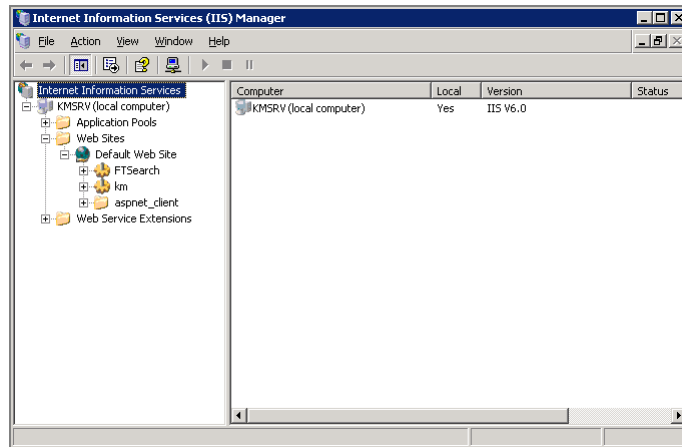


Figure 11-1. Internet Information Services (IIS) Manager

3. Right-click **FTSearch** under *Default Web Site* and click **Delete**.
4. Right-click **km** under *Default Web Site* and click **Delete**.

Appendix A: West km Ports

The ports used by West km Express are listed below. You may need to change port settings if a conflict exists with another service already using that port or if a firewall blocks a port.

In addition, for communication to occur between West km Express and Westlaw servers, your West km servers must allow HTTP and port 80 access through your firewall to these URLs:

- kcfags.westlaw.com
- rid.westlaw.com
- web2.westlaw.com
- westkmservices.westlaw.com

Database Management Server Ports

1433 Microsoft SQL Server's default port

Note Microsoft SQL Server must be configured to use a static port.

West km Ports

5364	PLDmsServicePort TaskCompilerPort
7899	FTSearchServicePort
8082	Search component port
8085	Bulk Load Controller Port Profile Sync Controller Port
8086	indexer_IndexingHelperControllerPort
8087	indexer_HtmlSearchControllerPort
8088	indexer_QuickSiftControllerPort
8091	MonitorServiceControllerPort
8092	West Full Text Searching service port
8093	indexer_IndexingWorkerControllerPort
8094	West km Analyzer Service port

Appendix B: Configuration File Properties

Analyzer Component (Litigation): Thomson.West.Dexter.Service.exe.config	129
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Shared: Shared.config	137
Worker Service: Thomson.Westkm.WorkerService.exe.config	138

This appendix describes the properties in select configuration files.

Table B-1. Analyzer component configuration file: Thomson.West.Dexter.Service.exe.config

Property Name	Allowable Range	Description
dexterInstallPath	Local path	The location where the analyzer component is installed. This value is populated during installation.
initialHeapSize maxHeapSize	Integer value. Append the letter <i>k</i> or <i>K</i> to indicate kilobytes, <i>m</i> or <i>M</i> to indicate megabytes, or <i>g</i> or <i>G</i> to indicate gigabytes.	The amount of memory allocated by the Java Virtual Machine to the West km Analyzer Service, both the initial amount of memory allocated and the maximum amount that can be allocated. The default value for initialHeapSize is <i>512m</i> . The default value for maxHeapSize is <i>768m</i> . The maxHeapSize value should not be set below <i>768m</i> .

Table B-2. Full-text search configuration file: Thomson.FTSearch.Server.exe.config

Property Name	Allowable Range	Description
log4net settings level file maxSizeRollBackups maximumFileSize	Varies; see Description column	<ul style="list-style-type: none"> level. Preassigned values: OFF, FATAL, ERROR, WARN, INFO, DEBUG, ALL. Sets the tracing level for the service. A tracing level (e.g., WARN) covers all higher levels of tracing as well (i.e., WARN, ERROR, and FATAL). The default value is <i>OFF</i>. file. Local filename path. The location and filename where tracing information for the service will be written. maxSizeRollBackups. Integer. The maximum number of files that can be created when a log file reaches its maximum size. The default value is <i>20</i>. maximumFileSize. Integer value in kilobytes, megabytes, or gigabytes. The maximum size a log file is allowed to reach before being rolled over to backup files, with the letters "KB", "MB", or "GB" appended to the integer. The default value is <i>50MB</i>.
FTSearchAdministrativePassword	String	The administrator password for the full-text searching service.
MaxFailedPasswdMatches	Integer	The number of failed login attempts before the account will be locked for the amount of time defined in MaxFailedPasswdMatchesSleepTime. To disable tracking of failed attempts, set to <i>0</i> .
MaxFailedPasswdMatchesSleepTime	Integer value in milliseconds	Time in milliseconds the account will be locked if there have been too many failed login attempts.
CacheRefreshTimeSpan	hh:mm:ss	Time interval for items in the cache to be refreshed. The default value is <i>00:05:00</i> .

Table B-2. Full-text search configuration file: Thomson.FTSearch.Server.exe.config (continued)

Property Name	Allowable Range	Description
FTSearchDbConnection	String	When using Microsoft SQL Server, the connection string to the full-text searching database: <ul style="list-style-type: none"> • Data Source = the server name • Initial Catalog = the database name • User ID and Password = the name and password of the system administrator account in SQL Server or a database user account with db_owner rights
EventViewerLog	String	The event log to which events are written.
EventViewerSource	String	The event source to use when logging events.
FTSearchDatabaseType	SqlServer.	The database application used for the service.
FTSearchDocumentStoreType	Filesystem	The type of storage system for documents.
Novus_Max_Index_Size	Integer value in megabytes	The maximum storage space in megabytes used to store groups of HTML documents for full-text indexing. The default value is 2048.
NovusRetryDocumentSpan	Integer value in seconds	In seconds, the least amount of time to wait to retry documents that failed full-text indexing. The default value is 1200 (20 minutes).
Is_Delivery_Server	true/false	Indicates whether the full-text searching service is installed on the West km server.
InstallDirectory	Local path	The installation folder of the full-text searching service.
NovusIndexingThreadCount	Integer Do not modify	The number of threads used to full-text index documents. The default value is 3.
NovusIndexingPollTime	Integer value in seconds	In seconds, the amount of time used to poll for full-text indexing work. The default value is 60. (Do not use a value under 10 seconds.)
NovusIndexDocumentCount	Integer Do not modify	The maximum number of documents to include in a Novus load. The default value is 10000.
NovusIndexDocumentSize	Integer value in megabytes Do not modify	The maximum size in megabytes to include in a Novus load. The default value is 25.
NovusIndexRetryAttempts	Integer	The number of times to retry a Novus load in which a document failed full-text indexing. The default value is 4.

Table B-2. Full-text search configuration file: Thomson.FTSearch.Server.exe.config (continued)

Property Name	Allowable Range	Description
NovusIndexFailedBatchSize	Integer value in megabytes Do not modify	The maximum size in megabytes to include in a Novus load that failed. The default value is 4.
LogNovusSearchEvents	true/false Do not modify	Indicates whether an analysis tool logs additional searching information. The default value is <i>false</i> .
NovusDeleteLoadFileOnError	true/false Do not modify	Indicates whether to delete a load file when there is an error in a Novus load. Not deleting load files allows you to keep Novus failed loads for debugging purposes. The default value is <i>true</i> .
NovusSentenceProximityActivated	true/false	Determines whether sentence connectors (/s and +s) in a full-text search will find search terms in the same sentence (<i>true</i>) or whether they are processed as numerical connectors, requiring terms to appear within 30 terms of each other (<i>false</i>). The default value is <i>false</i> . Note Changing this value after full-text indexing requires that full-text indexes be rebuilt.
FullTextIndexingSQLTimeout GetStatisticsSQLTimeout InsertNonProcessedNovusDocsSQLTimeout UpdateNovusBuildAsRebuildSQLTimeout DeleteEventLogSQLTimeout UpdateIndexingStatusSQLTimeout	Integer	Time to wait in seconds before terminating attempts to execute commands in SQL Server when communicating with the full-text search database.

Table B-3. IIS configuration file: Web.config

Property Name	Allowable Range	Description
log4net settings level file maxSizeRollBackups maximumFileSize	Varies; see Description column	<ul style="list-style-type: none"> level. Preassigned values: OFF, FATAL, ERROR, WARN, INFO, DEBUG, ALL. Sets the tracing level for the service. A tracing level (e.g., WARN) covers all higher levels of tracing as well (i.e., WARN, ERROR, and FATAL). The default value is <i>OFF</i>. file. Local filename path. The location and filename where tracing information for the service will be written. maxSizeRollBackups. Integer. The maximum number of files that can be created when a log file reaches its maximum size. The default value is 20. maximumFileSize. Integer value in kilobytes, megabytes, or gigabytes. The maximum size a log file is allowed to reach before being rolled over to backup files, with the letters "KB", "MB", or "GB" appended to the integer. The default value is 50MB.
getsplatfordocument getfirstsplatfortab getsplatfortab startsearch startqueryprogress authenticatewp	True/False Do not modify	Controls bypassing user authentication.
DbConnectionString	String	<p>When using Microsoft SQL Server, the connection string to the West km database:</p> <ul style="list-style-type: none"> Data Source = the server name Initial Catalog = the database name User ID and Password = the name and password of the system administrator account in SQL Server or a database user account with db_owner rights
DatabaseType	0/1	<p>Sets the database application used for the West km databases.</p> <p>Set to 0 for Microsoft SQL Server.</p>

Table B-3. IIS configuration file: Web.config (continued)

Property Name	Allowable Range	Description
atlas_AuthenticationMode	Possible values are: None IWA kmAuthentication Values are not case-sensitive.	The authentication method used to control user access to West km Express. <ul style="list-style-type: none"> The <i>None</i> model uses two URLs, one for users and one for administrators. The <i>kmAuthentication</i> method uses usernames and passwords administered in West km. The <i>IWA</i> model uses Windows network IDs stored in West km (without passwords). <p>If you change this setting, other changes are required. For details, see “Appendix B: Changing the Authentication Method” on page 234.</p>
display_km_change_password_link	true/false	When atlas_AuthenticationMode is set to kmAuthentication, determines whether the Change Password link is available in the user interface. If set to <i>true</i> , the link is provided.
Hide_Non_KM_West_Links westlaw_urls	true/false	Determines whether westlaw.com links (non–West km links) are removed before rendering documents. The default value is <i>false</i> (links are shown).
use_https	true/false	Indicates whether your organization is using SSL or not. If set to <i>true</i> , West km will ensure all URLs found in the config file have <i>http://</i> replaced with <i>https://</i> . With this setting, it is not necessary to change all URLs within the config file individually.
useEncryptedDBUsernamePassword	true/false	Indicates whether the user ID and password for the DbConnectionString property are encrypted (<i>true</i>) or in plain text (<i>false</i>). For new installations, the value is set via the installation program and is <i>true</i> if the Encrypt DB User and Password check box is selected. After installation, you can change the value to <i>false</i> and type the DbConnectionString property value in plain text. You cannot, however, change the value from <i>false</i> to <i>true</i> and encrypt the DbConnectionString property value yourself.
SearchFormCacheExpirationTime	Time (hh:mm:ss format) or integer value in seconds	Sets the running time for a process that queries the West km database and populates a cache of values for providing the options in drop-down lists and look-up controls on the Fields panel. For the property value, specify either a time (e.g., <i>23:00:00</i> for 11 p.m.) or a time interval in seconds (e.g., <i>3600</i> for each hour) for the cache to be refreshed. The default value is <i>06:00:00</i> (6 a.m.).

Table B-4. Indexing configuration file: Thomson.Westkm.IndexingService.exe.config

Property Name	Allowable Range	Description
log4net settings level file maxSizeRollBackups maximumFileSize	Varies; see Description column	<ul style="list-style-type: none"> level. Preassigned values: OFF, FATAL, ERROR, WARN, INFO, DEBUG, ALL. Sets the tracing level for the service. A tracing level (e.g., WARN) covers all higher levels of tracing as well (i.e., WARN, ERROR, and FATAL). The default value is <i>OFF</i>. file. Local filename path. The location and filename where tracing information for the service will be written. maxSizeRollBackups. Integer. The maximum number of files that can be created when a log file reaches its maximum size. The default value is 20. maximumFileSize. Integer value in kilobytes, megabytes, or gigabytes. The maximum size a log file is allowed to reach before being rolled over to backup files, with the letters "KB", "MB", or "GB" appended to the integer. The default value is 50MB.
LoadProfileSizes	true/false Do not modify	<p>Controls whether the cache for storage locations of HTML documents are loaded with document sizes (see RefreshIntervalHours below).</p> <p>In Thomson.Westkm.IndexingService.exe.config, this property should always be <i>true</i>. In Web.config, this property should always be <i>false</i>.</p>
RefreshIntervalHours	Integer value in hours	<p>How often the cache for storage locations of HTML documents is refreshed. The cache tracks all stores and the size of their documents, so it can perform load balancing when new documents are added.</p> <p>This information is tracked on the fly, so this refresh serves as a safety backup.</p>
DbConnectionString	String	<p>When using Microsoft SQL Server, the connection string to the West km database:</p> <ul style="list-style-type: none"> Data Source = the server name Initial Catalog = the database name User ID and Password = the name and password of the system administrator account in SQL Server or a database user account with db_owner rights
DatabaseType	0/1	<p>Sets the database application used for the West km databases.</p> <p>Set to 0 for Microsoft SQL Server.</p>

Table B-4. Indexing configuration file: Thomson.Westkm.IndexingService.exe.config (continued)

Property Name	Allowable Range	Description
useEncryptedDBUsernamePassword	true/false	Indicates whether the user ID and password for the DbConnectionString property are encrypted (<i>true</i>) or in plain text (<i>false</i>). For new installations, the value is set via the installation program and is <i>true</i> if the Encrypt DB User and Password check box is selected. After installation, you can change the value to <i>false</i> and type the DbConnectionString property value in plain text. You cannot, however, change the value from <i>false</i> to <i>true</i> and encrypt the DbConnectionString property value yourself.
IManageNonSupportedFields	String Separate multiple values with the pipe symbol ().	Indicates WorkSite fields to be ignored by West kmExpress during indexing and field validation. Note This setting does not exist by default in the configuration file.
MetadataUpdateJobBatchSize	Integer	The number of profiles to process in a batch when updating search performance metadata tables. The default value is 10000. Note This setting does not exist by default in the configuration file.
MetadataUpdateJobMaxRetryAttempts	Integer	The number of retry attempts if a processing batch fails when updating search performance metadata tables. The default value is 5. If all attempts fail, then the profiles will be retried in the next metadata update job. Note This setting does not exist by default in the configuration file.

Table B-5. Monitor service configuration file: Thomson.Westkm.MonitorService.exe.config

Property Name	Allowable Range	Description
log4net settings level file maxSizeRollBackups maximumFileSize	Varies; see Description column	<ul style="list-style-type: none"> level. Preassigned values: OFF, FATAL, ERROR, WARN, INFO, DEBUG, ALL. Sets the tracing level for the service. A tracing level (e.g., WARN) covers all higher levels of tracing as well (i.e., WARN, ERROR, and FATAL). The default value is OFF. file. Local filename path. The location and filename where tracing information for the service will be written. maxSizeRollBackups. Integer. The maximum number of files that can be created when a log file reaches its maximum size. The default value is 20. maximumFileSize. Integer value in kilobytes, megabytes, or gigabytes. The maximum size a log file is allowed to reach before being rolled over to backup files, with the letters "KB", "MB", or "GB" appended to the integer. The default value is 50MB.

Table B-5. Monitor service configuration file: Thomson.Westkm.MonitorService.exe.config (continued)

Property Name	Allowable Range	Description
MonitorServiceControllerPort	Open port	Used for the West km Monitor Service to communicate with West km servers and other services. The default port is 8091. This value needs to change only if there is a port conflict.

Table B-6. Professionals import utility configuration file: Thomson.Westkm.ImportUtility.exe.config

Property Name	Allowable Range	Description
log4net settings level file maxSizeRollBackups maximumFileSize	Varies; see Description column	<ul style="list-style-type: none"> level. Preassigned values: OFF, FATAL, ERROR, WARN, INFO, DEBUG, ALL. Sets the tracing level for the service. A tracing level (e.g., WARN) covers all higher levels of tracing as well (i.e., WARN, ERROR, and FATAL). The default value is <i>OFF</i>. file. Local filename path. The location and filename where tracing information for the service will be written. maxSizeRollBackups. Integer. The maximum number of files that can be created when a log file reaches its maximum size. The default value is 20. maximumFileSize. Integer value in kilobytes, megabytes, or gigabytes. The maximum size a log file is allowed to reach before being rolled over to backup files, with the letters "KB", "MB", or "GB" appended to the integer. The default value is 50MB.
DbConnectionString	String	<p>When using Microsoft SQL Server, the connection string to the West km database:</p> <ul style="list-style-type: none"> Data Source = the server name Initial Catalog = the database name User ID and Password = the name and password of the system administrator account in SQL Server or a database user account with db_owner rights
DatabaseType	0/1	<p>Sets the database application used for the West km databases.</p> <p>Set to 0 for Microsoft SQL Server.</p>
Timeout	Integer	Time to wait in seconds before terminating an attempt to execute a command in SQL Server when running the import utility.

Table B-6. Professionals import utility configuration file: Thomson.Westkm.ImportUtility.exe.config (continued)

Property Name	Allowable Range	Description
useEncryptedDBUsernamePassword	true/false	<p>Indicates whether the user ID and password for the DbConnectionString property are encrypted (<i>true</i>) or in plain text (<i>false</i>).</p> <p>For new installations, the value is set via the installation program and is <i>true</i> if the Encrypt DB User and Password check box is selected. After installation, you can change the value to <i>false</i> and type the DbConnectionString property value in plain text. You cannot, however, change the value from <i>false</i> to <i>true</i> and encrypt the DbConnectionString property value yourself.</p>

Table B-7. Shared configuration file: Shared.config

Property Name	Allowable Range	Description
HtmlConversionTemplate	Local path	<p>Location of the template file containing rules on how documents, PDF documents, and PowerPoint (PPT) documents are converted to HTML. By default, the template files are located in the bin subfolder in the West km installation folder.</p> <p>Note By design, the templates omit a document's generated table of contents from the conversion. To see a document's table of contents in West km Express, use the Load Copy feature.</p> <p>Template files are as follows.</p> <p>htmlConversionEngineOptions</p> <ul style="list-style-type: none">• conversion_template.htm is the default template, which does not preserve tab spacing• conversion_template_tabs.htm preserves tab spacing <p>htmlConversionEngineOptions_pdf</p> <ul style="list-style-type: none">• conversion_template_pdf_no_image.htm converts only the text in the PDF file and displays a notice that the formatting and images may not be displayed• conversion_template_pdf.htm converts PDF text and images as a series of images, with the text portion duplicated so it is available for searching (this option is space intensive) <p>htmlConversionEngineOptions_ppt</p> <ul style="list-style-type: none">• conversion_template_ppt_no_image.htm converts only the text in the PPT file and displays a notice that the formatting and images may not be displayed• conversion_template_ppt.htm converts PPT text and images as a series of images, with the text portion duplicated so it is available for searching (this option is space intensive)

Table B-7. Shared configuration file: Shared.config (continued)

Property Name	Allowable Range	Description
APOS_AS_SECTION	True/False	West km RID processing option that determines whether West km RID will recognize citations in which an apostrophe is used as a section indicator (rather than a section symbol § or the word <i>section</i>), e.g., <i>26 USCA ' 101</i> . The default value is <i>False</i> .
INITIAL_HEAP_SIZE MAX_HEAP_SIZE	Integer value that is a multiple of 1024 greater than 1MB. Append the letter <i>k</i> or <i>K</i> to indicate kilobytes, <i>m</i> or <i>M</i> to indicate megabytes, or <i>g</i> or <i>G</i> to indicate gigabytes.	The amount of memory allocated to the West km Worker Service by the Java Virtual Machine, both the initial amount of memory allocated and the maximum amount that can be allocated. These values depend on the size of your organization's documents, the number of citations contained in the documents, and the amount of server memory. Organizations with typically large documents may want to increase the initial heap size. Organizations with documents containing a high density of citations may want to increase the maximum heap size.

Table B-8. Worker service configuration file: Thomson.Westkm.WorkerService.exe.config

Property Name	Allowable Range	Description
log4net settings level file maxSizeRollBackups maximumFileSize	Varies; see Description column	<ul style="list-style-type: none"> level. Preassigned values: OFF, FATAL, ERROR, WARN, INFO, DEBUG, ALL. Sets the tracing level for the service. A tracing level (e.g., WARN) covers all higher levels of tracing as well (i.e., WARN, ERROR, and FATAL). The default value is <i>OFF</i>. file. Local filename path. The location and filename where tracing information for the service will be written. maxSizeRollBackups. Integer. The maximum number of files that can be created when a log file reaches its maximum size. The default value is <i>20</i>. maximumFileSize. Integer value in kilobytes, megabytes, or gigabytes. The maximum size a log file is allowed to reach before being rolled over to backup files, with the letters "KB", "MB", or "GB" appended to the integer. The default value is <i>50MB</i>.
DbConnectionString	String	When using Microsoft SQL Server, the connection string to the West km database: <ul style="list-style-type: none"> Data Source = the server name Initial Catalog = the database name User ID and Password = the name and password of the system administrator account in SQL Server or a database user account with db_owner rights

Table B-8. Worker service configuration file: Thomson.Westkm.WorkerService.exe.config (continued)

Property Name	Allowable Range	Description
DatabaseType	0/1	Sets the database application used for the West km databases. Set to 0 for Microsoft SQL Server.
useEncryptedDBUsernamePassword	true/false	Indicates whether the user ID and password for the DbConnectionString property are encrypted (<i>true</i>) or in plain text (<i>false</i>). For new installations, the value is set via the installation program and is <i>true</i> if the Encrypt DB User and Password check box is selected. After installation, you can change the value to <i>false</i> and type the DbConnectionString property value in plain text. You cannot, however, change the value from <i>false</i> to <i>true</i> and encrypt the DbConnectionString property value yourself.

Appendix C: Authentication and Document Security Configuration

Depending on your DMS, West km authentication method, and authenticating network, Table C-1 on page 141 lists the configuration that is required for West km document security and authentication to function properly.

The authenticating network is the network to which members authenticate when signing on to your organization's network and with which your organization's DMS is configured to interoperate.

For more information about

- selecting an authentication method for West kmExpress, see "2.1.4 Authentication Methods" on page 10.
- administering West km members in the Professionals table, see "Administering West km Members" on page 85.
- controlling access to your West km documents via the document security implemented in your DMS, see "Document Security Level" on page 38.

Note All NTFS documents are treated as public in West km.

Table C-1. Authentication and document security configuration

DMS	West km Security Model	DMS Authenticating Network	Configuration Details
eDOCS DM (database connection)	IWA	Windows	The Network ID in the Professionals table must match the Windows network ID (qualified by domain) for each member.
eDOCS DM (database connection)	Custom	Windows	Each member must have a custom user name and custom user password in the Professionals table. To use the Full or Always Display Titles document security, the Network ID in the Professionals table must match the Windows network ID (qualified by domain) for each member.
eDOCS DM (database connection)	IWA	Novell	The Network ID in the Professionals table must match the Windows network ID (qualified by domain) for each member. To use the Full or Always Display Titles document security, <ul style="list-style-type: none"> • Users in eDOCS DM must be integrated with the Novell server. • Members must have their Novell Directory Services (NDS) username in full context (e.g., username.dept.location.us) in the Novell Network ID field in the Professionals table. • Each data source connection should have the Use Novell Credentials for Security check box selected.
eDOCS DM (database connection)	Custom	Novell	Each member must have a custom user name and custom user password in the Professionals table. To use the Full or Always Display Titles document security, <ul style="list-style-type: none"> • Users in eDOCS DM must be integrated with the Novell server. • Members must have their Novell Directory Services (NDS) username in full context (e.g., username.dept.location.us) in the Novell Network ID field in the Professionals table. • Each data source connection should have the Use Novell Credentials for Security check box selected.

Table C-1. Authentication and document security configuration (continued)

DMS	West km Security Model	DMS Authenticating Network	Configuration Details
eDOCS DM (API connection)	IWA	Windows	<p>The Network ID in the Professionals table must match the Windows network ID (qualified by domain) for each member.</p> <p>One of the following must be configured:</p> <ul style="list-style-type: none"> The DMS library information in Data Source Management must contain an admin username and password. This option does not require password management like the option below. However, it does not allow user-based access records to be logged when users load documents from the DMS using the Load Copy feature. All members must have their eDOCS DM usernames and network passwords entered in the DMS UserID and DMS Password fields in the Professionals table. (To enable these fields, the FusionUseIndividualLogins, <i>User ID Required</i>, and <i>User Password Required</i> settings must be selected.) Note that if a member changes his or her network password, it must also be changed in the Professionals table. This option allows eDOCS DM to log user-based access records when members load documents from the DMS using the Load Copy feature.
eDOCS DM (API connection)	Custom	Windows	<p>Each member must have a custom user name and custom user password in the Professionals table.</p> <p>To use the Full or Always Display Titles document security, the Network ID in the Professionals table must match the Windows network ID (qualified by domain) for each member.</p> <p>One of the following must be configured:</p> <ul style="list-style-type: none"> The DMS library information in Data Source Management must contain an admin username and password. This option does not require password management like the option below. However, it does not allow user-based access records to be logged when users load documents from the DMS using the Load Copy feature. All members must have their eDOCS DM usernames and network passwords entered in the DMS UserID and DMS Password fields in the Professionals table. (To enable these fields, the FusionUseIndividualLogins, <i>User ID Required</i>, and <i>User Password Required</i> settings must be selected.) Note that if a member changes his or her network password, it must also be changed in the Professionals table. This option allows eDOCS DM to log user-based access records when members load documents from the DMS using the Load Copy feature.

Table C-1. Authentication and document security configuration (continued)

DMS	West km Security Model	DMS Authenticating Network	Configuration Details
eDOCS DM (API connection)	IWA	Novell	<p>The Network ID in the Professionals table must match the Windows network ID (qualified by domain) for each member.</p> <p>To use the Full or Always Display Titles document security,</p> <ul style="list-style-type: none">• Users in eDOCS DM must be integrated with the Novell server.• Members must have their Novell Directory Services (NDS) username in full context (e.g., username.dept.location.us) in the Novell Network ID field in the Professionals table.• Each data source connection should have the Use Novell Credentials for Security check box selected. <p>One of the following must be configured:</p> <ul style="list-style-type: none">• The DMS library information in Data Source Management must contain an admin username and password. This option does not require password management like the option below. However, it does not allow user-based access records to be logged when users load documents from the DMS using the Load Copy feature.• All members must have their eDOCS DM usernames and network passwords entered in the DMS UserID and DMS Password fields in the Professionals table. (To enable these fields, the FusionUseIndividualLogins, <i>User ID Required</i>, and <i>User Password Required</i> settings must be selected.) Note that if a member changes his or her network password, it must also be changed in the Professionals table. This option allows eDOCS DM to log user-based access records when members load documents from the DMS using the Load Copy feature.

Table C-1. Authentication and document security configuration (continued)

DMS	West km Security Model	DMS Authenticating Network	Configuration Details
eDOCS DM (API connection)	Custom	Novell	<p>Each member must have a custom user name and custom user password in the Professionals table.</p> <p>To use the Full or Always Display Titles document security,</p> <ul style="list-style-type: none"> • Users in eDOCS DM must be integrated with the Novell server. • Members must have their Novell Directory Services (NDS) username in full context (e.g., username.dept.location.us) in the Novell Network ID field in the Professionals table. • Each data source connection should have the Use Novell Credentials for Security check box selected. <p>One of the following must be configured:</p> <ul style="list-style-type: none"> • The DMS library information in Data Source Management must contain an admin username and password. This option does not require password management like the option below. However, it does not allow user-based access records to be logged when users load documents from the DMS using the Load Copy feature. • All members must have their eDOCS DM usernames and network passwords entered in the DMS UserID and DMS Password fields in the Professionals table. (To enable these fields, the FusionUseIndividualLogins, <i>User ID Required</i>, and <i>User Password Required</i> settings must be selected.) Note that if a member changes his or her network password, it must also be changed in the Professionals table. This option allows eDOCS DM to log user-based access records when members load documents from the DMS using the Load Copy feature.

Table C-1. Authentication and document security configuration (continued)

DMS	West km Security Model	DMS Authenticating Network	Configuration Details
WorkSite (iManage)	IWA	Windows	<p>The DMS library information in Data Source Management must contain an admin username and password.</p> <p>The Network ID field in the Professionals table must match the Windows network ID (qualified by domain) for each member.</p> <p>If WorkSite is configured to use virtual usernames, one of the following must be configured:</p> <ul style="list-style-type: none"> • All members must have their WorkSite virtual usernames entered into the Professionals table, and West km Express must be configured at Setup, System Options, DMS Settings, iManage. <i>User ID Required</i> must be selected to enable this field. This configuration relies on West km logic to apply document level security. • All members must have their WorkSite virtual usernames and passwords entered into the Professionals table. <i>User ID Required</i> and <i>User Password Required</i> must be selected to enable these fields. This configuration relies on WorkSite to apply security. Note that if a user changes his or her WorkSite password, it must also be changed in the Professionals table.
WorkSite (iManage)	Custom	Windows or Novell	<p>The DMS Library information in Data Source Management must contain an admin username and password.</p> <p>Each member must have a custom user name and custom user password in the Professionals table.</p> <p>If WorkSite is configured to use virtual usernames, one of the following must be configured:</p> <ul style="list-style-type: none"> • All members must have their WorkSite virtual usernames entered into the Professionals table, and West km Express must be configured at Setup, System Options, DMS Settings, iManage. <i>User ID Required</i> must be selected to enable this field. This configuration relies on West km logic to apply document level security. • All members must have their WorkSite virtual usernames and passwords entered into the Professionals table. <i>User ID Required</i> and <i>User Password Required</i> must be selected to enable these fields. This configuration relies on WorkSite to apply security. Note that if a user changes his or her WorkSite password, it must also be changed in the Professionals table. <p>If WorkSite is configured to use network usernames,</p> <ul style="list-style-type: none"> • The Network ID in the Professionals table must match the network ID (Windows or Novell, whichever applies) for each member.

Table C-1. Authentication and document security configuration (continued)

DMS	West km Security Model	DMS Authenticating Network	Configuration Details
NTFS	IWA	Windows	The Network ID in the Professionals table must match the Windows network ID (qualified by domain) for each member.
NTFS	Custom	Windows or Novell	Each member must have a custom user name and custom user password in the Professionals table.
ProLaw	IWA	Windows	The Network ID in the Professionals table must match the Windows network ID (qualified by domain) for each member.
ProLaw	Custom	Windows or Novell	The Network ID in the Professionals table must match the network ID (either Windows or Novell, whichever applies) for each member. Each member must have a custom user name and custom user password in the Professionals table.

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