Wolters Kluwer

winra-Legal Department Software

Installation winra-Update 7.0

Guideline and technical information

winra

Business Unit Legal – In-house lawyers

Datum   December 2020

Version   **winra Version 7.0 , 2020.12**

Passing on or duplication only by end customers for their internal purposes.

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1 Introduction

Dear customers!

We are pleased to present you with our latest update. Below we describe the installation process as well as the technical changes that occur with this update.

For your information: For the users there is a separate document with detailed descriptions.

Please install the update at short notice! In addition to the changes described in the following, we have also fixed small bugs and improved performance and stability.

If you have several winra databases in productive use, the update installation described here must be carried out individually for each database!

If you have any questions, our support is available as usual in a competent and friendly manner at

- Email: anwendersupport.software-recht@wolterskluwer.com
- Telefon: 040 / 53 93 269-02, -03 und -04.

We wish you much fun and pleasure with the new update!

With kind regards

Your winra team

2   Installation manual update winra 7.0

2.1   Introduction

The duration of the installation of the update usually takes 30 - 60 minutes, so please be patient!

Please note:

- The update installation includes the update of the winra database as well as the update of the winra program files. If you have installed or rolled out the winra program files on the PC clients, then after the successful update installation, it is absolutely necessary to roll out the entire program directory on the PC clients.

- Prerequisites are therefore a PC or desktop with which you have full access to the winra program files and the winra database and write access to the winra program files.

- During the installation process you will automatically be asked to backup the winra database.

- If several winra databases are used, e.g. in the legal and personnel departments, the following installation must be carried out separately for each database!

- In Version 6.4 there was an update for the ABBYY-OCR recognition. If you have purchased this package and not installed 6.4 yet, you must also update the ABBYY License Manager and deposit a new ABBYY license. See Chapter 4 for more information.

- Starting with version 6.3. winra requires a service for some functions, e.g. sending appointment reminders, which runs independently from the login of a winra user. These are the winraWebServices. See chapter 3 for more information.

- For secure transport encryption of the data, an update of the Microsoft database driver is required. See Chapter 8 for more information.

Attention: For version 7.0 an updated license must be installed. Please make sure that the new license is available before applying the update. Without this new license you will not be able to start winra after the update.

2.2   Preparations

To install the update, please proceed as follows:

1) Please make sure that nobody works with winra.

2) Download the file "winra-update-7.0.*.zip The link to our server can be found in the e-mail about this update.

3) Unpack the zip file. The files "Build_7.0.*.zip" and "Updater.exe" and the folders "OCR-Setup", "Licenses" and "WebPublisher" will be unpacked.

4) The Licenses folder contains the licenses for the open source software used in winra. The file 'Overview Free and Open Source Software.pdf' contains a table with an overview.

5) The OCR Setup folder contains the actual version of ABBYY-OCR components. It is the same version as in version 6.4. If you have installed version 6.4, the ABBYY-OCR-Component does need another update. If you update from version 6.3 or older and have booked the winra OCR package, the updater will update the client OCR files. Attention: You must also update the ABBYY License Manager and import a new license. This license must be available at the time of installation. See Chapter 4.

6) Microsoft®.NET Framework in in version 4.7.2 is needed for the winra client, which is usually automatically included when using MS Windows 10 from April 2018.

7) To use beA - the special electronic attorney mailbox - the winra client must meet the following additional requirements:

   a.   Microsoft Visual C++ Redistributable 2012.

   b.   Microsoft Visual C++ Redistributable 2013.

8) The new Microsoft database driver must be downloaded and distributed to ensure secure transport encryption. See Chapter 8 The current database driver will still work, so you can update or skip the database driver update later.

2.3 Automatic installation of the update

The following describes how to install the update for the winra database and the winra program files in one step.

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1) Start the file "Updater.exe" by double-clicking it. The following window will open:
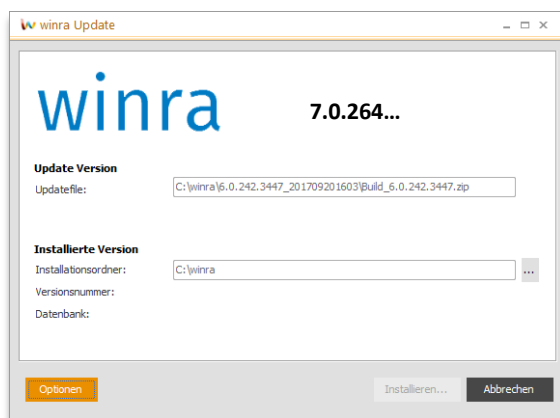
2) In the field "Installation folder" select the path of the winra program files, e.g. \\...\winra\. Select the root folder directly, please do **not** select the subdirectories like 'bin' etc.

3) Then click on "Install".

4) You will be asked during the installation process if you want to make a backup of the database. The backup file is stored in the standard backup directory of the SQL server.

5) The program reports after successful execution.

2.4   Alternatively: Installing the update manually

2.4.1 Instructions for updating the database structure and program client separately

Usually, the database update is done automatically as part of the update process. In the standard installation scenario the Upater.exe will update the winra program directory and the database structure in one go.

Depending on the installation or update scenario, it may be necessary to execute the database update independently of the update of the program client.

An older winra client cannot work with a newer database structure. When the client is started, an error message will appear and the winra client will then quit. Therefore, all users should get the new winra client at the same time as the database update.

2.4.2 Preparing the database update

The database update is performed with the program DBUpdater.exe. In order for it to work correctly, additional data is required. The following table lists all required files:

DBUpdater.exe	From the bin directory of the update package (e.g. 7.0.*.zip\Build_7.0.*.zip\bin)
DBModification.zip	From the bin directory of the update package (like DBUpdater.exe)
dbversion.config	From the bin directory of the update package (like DBUpdater.exe)
WinRA5.config	This is the configuration file of the currently installed winra client. It is located in the bin directory of the installation, e.g. C:\programs\winra\bin. Depending on the type of installation, the client may also be located on a network path. If you are not sure which is the correct path, you can check with a winra user: On their desktop there is a winra icon that is linked to the winra.exe of the installation. The winra5.config is located in the bin subdirectory of this installation folder.

It is best to copy these 4 files into a subfolder:

The DBUpdate can be executed from any computer in the network. It is not absolutely necessary to create this directory on the database server.

The connection information to the database is taken from winra5.config. The database login 'WinraAdmin' is used to log in to the database. This login was created during the initial installation of winra on the SQL server. It requires db_owner rights on the winra database.

It is necessary to make a backup of the database before installing the database update. This can be done manually with the SQL Management Studio or with the DBUpdater. If you make the backup with the DBUpdater it is necessary, that the login 'WinraAdmin' has the right 'DBCreator' as well as the right db_owner. This right is necessary to restore the database in case of errors. Please check if these rights are available before the update.

2.4.3 Performing the database update

Before installing the update, the database must be backed up. After the backup, the update process can be started. For this purpose, please start the DBUpdater.exe in the newly created directory. After the start the DBUpdater should look something like this:
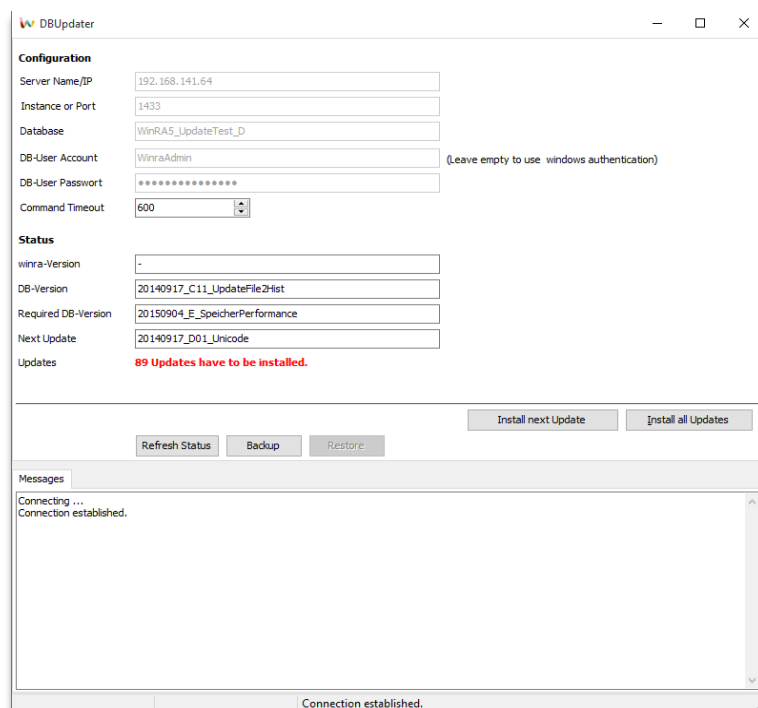
If problems occur during the first connection attempt, the connection data can be corrected.

With 'Install all Updates' the update process is started.

Please do not abort the update process. Long-running SQL statements are executed. During this time, the client waits for a response from the SQL server and does not respond to Windows messages. If Windows displays 'Program not responding', it does not mean that the update program has crashed, but only that it does not respond to Windows messages. In this case please just wait until the program reacts again or an error message appears.
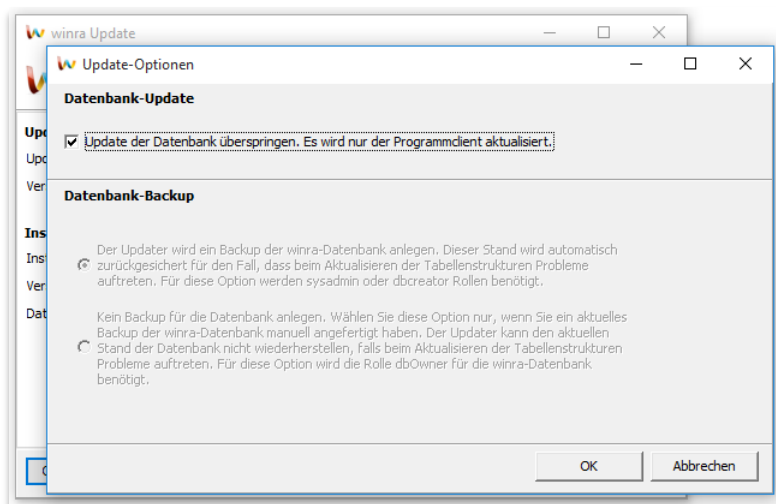
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2.4.4 Preparing the client update

Usually the program client is updated by the Updater.exe. The Updater.exe also updates the database structure as part of the update. Depending on the installation scenario, however, it may be necessary to update the program client independently of the database adjustment, for example, if the program client is to be prepared for distribution.

A copy of the current winra client is required. This can be downloaded from a current user installation. It is recommended to create a master copy of the client on a drive independent of the user. This simplifies future updates.
The program client includes the winra5.exe and all subdirectories bin, exe, etc.

2.4.5 Performing the client update

Start the Updater.exe from the installation package and select the folder where the copy of the previous winra client is located. Go to Options and select 'Skip database update':

Execute the update with this option. The Updater.exe then updates the client directory for the new version. This involves exchanging the program files and making the necessary adjustments to the winra5 configuration file.

The new directory can then be packaged and distributed. You only need to replace the old program directory with the new program directory. No further changes, such as registry entries, are necessary on the client. If the beA interface is to be used, .NET 4.7.2, VC++ Runtime 2012 and VC++ Runtime 2013 must be installed on the client. (see chapter 2.2)

The new directory replaces the old one completely, i.e. the old client directory should be deleted before the new client is copied.

3   winraWebServices service

Some functions in winra from version 6.3. onwards must be able to be executed independently of the logged in user. These are e.g. appointment reminders and, if necessary, the online file. These tasks are performed by the winra WebServices service.

The winra WebServices service can and should be installed as a Windows service on a server.

3.1   System requirements

The winraWebServices should be installed on a server. They provide WebServices that are usually available via port 9070. This port should be accessible for all computers on which winra is running.

This port only needs to be available within your network.

- Latest Windows

- .Net runtime in version 4.7.2

- Open port 9070 - this can be changed during the installation, but must be available first

- Access to the winra database

- Access to an SMTP mail account for sending notifications.

- Local administration rights for the installation (not required for operation)

- During installation: Access to the winra program files

The winraWebServices are installed as a Windows service. Possible errors are stored in the Windows event log. The winraWebServices work completely "stateless". Apart from a configuration file, which is created during the installation, no user data is stored on the server hard disk or in the Windows registry. Where necessary, however, the service writes to the winra database.

Note on the use of the online file:

Further requirements are necessary when using the online file. See the documentation on the online record. If you are already using the winra online record, you can use the services installed with it for the winra functions after an update.

3.2   Installation and configuration of winraWebServices

The installation for the winraWebService copies the program files, creates the connection to the winra database and creates two firewall rules to allow access to the services. Furthermore, the service is registered with Windows. The two firewall rules concern port 9070, which is opened for incoming and outgoing communication. The new rules can be found in the Windows firewall under the name "winra WebServices".

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At this point we describe the installation and configuration of winraWebServices without using the online file. If you want to use the online file, you should also refer to the separate documentation on installing the winra online file.

During the installation of winraWebServices, winra itself can be used normally.

3.2.1 Configuration for the winraWebServices

Except for a few configurations that affect the service itself, such as the database access information, all configurations are stored in winra. These are mainly the SMTP server settings for sending notifications and the connection URL to the winraWebServices.

If possible, the settings in the winra database should be made before installing the WebService to be able to start immediately with the correct data. If the settings are changed, the winraWebSerive service may have to be restarted via the Windows services overview.

- Open the system administration in winra. In the "Email Notifications" section of System Administration you will find the settings used to notify users about events by email. Notifications are sent e.g. when the online file is released, but also as appointment reminders.
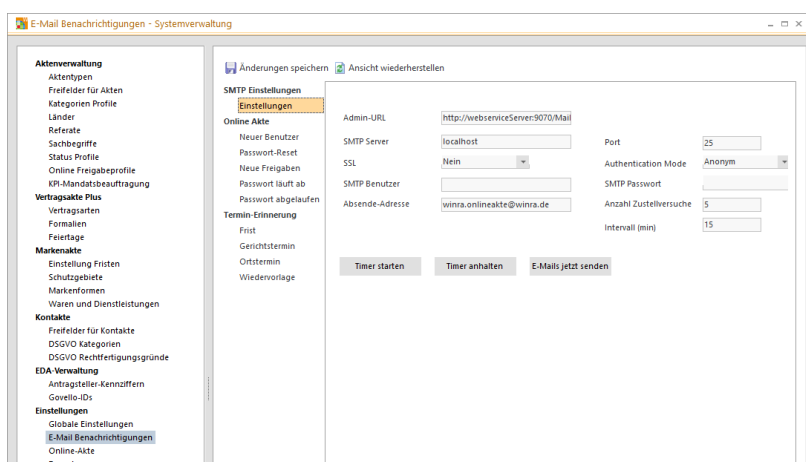
- To send notifications, you need an SMTP service with a valid account to receive the emails. Most parameters are provided for this purpose. The others are:

  - Admin URL: An address where winra can reach the WebService for sending mail. Usually this is in the format "http://<machine name>:<port>/mail". Pay attention to the ending "/Mail" so that the correct endpoint is addressed.
    The port for sending mail must only be accessible from the computers running winra
  - Number of delivery attempts: limits the number of attempts, e.g. for incorrect mail addresses
  - Interval: Determines the sending interval for notifications.

The buttons "Start timer", "Pause timer" and "Send email now" can be used later to control the sending of email notifications.

3.2.2 Installing the service

- You will receive a separate installation package "WinraWebServices*.zip". Please make sure that the version number in the file name matches that of your winra installation.

- Copy the installation package to the server where the winraWebServices are running and unpack it into a folder of your choice.

- Start the program "WinraWebServices.Setup.exe" in the "Setup" subfolder. You may be asked for local administrator rights.

- The setup wizard will offer you the first two options for the installation.

- Select the folder where you want to install the winraWebServices and the folder where the winra5.exe is located. The wizard will show you the version number and the server for the database.

- Switch to the next pages with "Next" and decide which services you want to activate.

- Click "Install" to start the installation.

## 3.3 Update of the winraWebServices

The update for the winraWebServices exchanges the program files. To do this, the Windows service for the winraWebServices is stopped, the program files are copied and then restarted.

- You will receive a separate installation package "WinraWebServices*.zip". Please make sure that the version number in the file name matches that of your winra installation.

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- Copy the installation package to the server where the winraWebServices are running and unpack it into a folder of your choice.

- Start the program "WinraWebServices.Setup.exe" in the "Setup" subfolder. You may be asked for local administrator rights.

- The setup wizard should detect the running service and offers you the first option "Install / Update WebService.
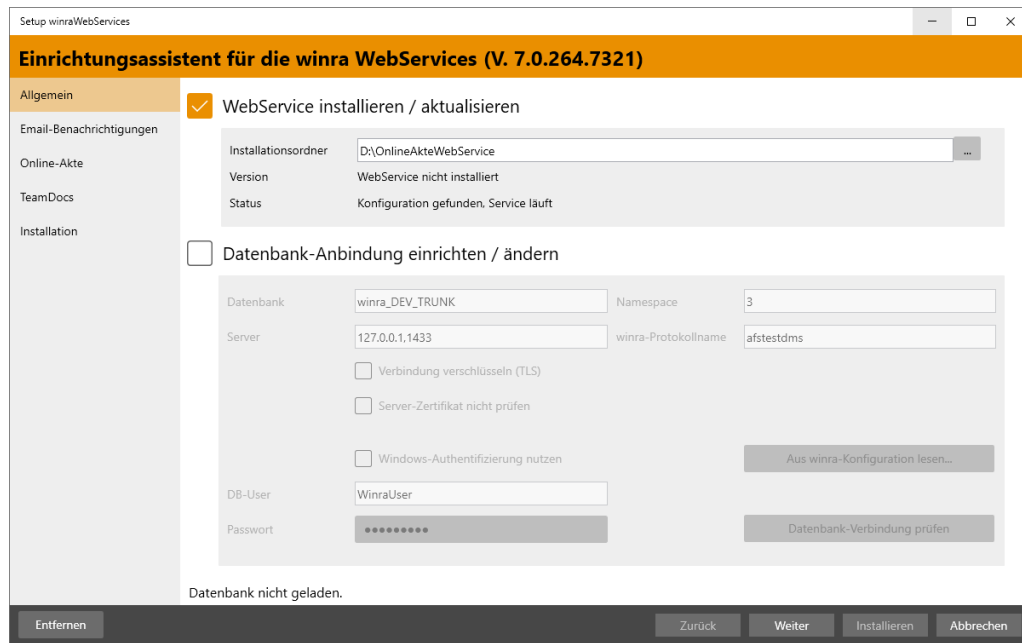
- If you want to change the configuration, you can select "Configure WebService".

- Click on "Install" to start the installation.

During the installation the services of winraWebServices are not available. winra itself can be used normally during the update of the services.

4 Updating the OCR component

The OCR recognition is performed by the winra client. The necessary files are located in the "OCR" subfolder of the winra client. This folder is only available for customers who have booked the OCR package.

The winra updater recognizes if this folder exists and updates the files contained therein. Due to the new version, it is also necessary to update the Abbyy license server and import a new license. The new license has been sent by mail to all customers who have booked the OCR package. The mail was sent to the winra contact persons of our customers. These are the ones who also get the news about new winra versions.

The update for the license server is also included in the update package and is located in the subdirectory "OCR Setup\License Server". If it is not known where the license server is installed, you can check the configuration file "LicensingSettings.xml". This file is located in the directory "OCR\bin" of the installed winra client.

The new license must be entered and activated in the license manager. For the activation a one-time internet connection is necessary. If no internet connection is available, there are also possibilities for offline activation. You can read the details in the file "Installation.txt" in the directory OCR-Setup of the installation package.

The license managers of the old and new version of the OCR component can be installed in parallel, but it is recommended to remove the old one first.

5   When using the winra-WebPublisher

The winra-Webpublisher has been replaced by the winra Online-File und can be removed.

6   Installation of the winra tools

6.1   Only when using the "winra contacts importer"

The program runs on the server.

Download the file "winra-Tools-7.0.264.zip" and unzip it: Please copy the file "winraImporter.exe" to the place of the currently existing file "winraImporter.exe" on your server.

If you use the contact importer as a Windows service, you have to copy the file "winraImporterSVC.exe" from the archive "Tools.zip" to the place of the existing file "winraImporterSVC.exe". To do this, you must stop the "winra-Import-Service" service before and restart it after the copying process.

6.2   Only when using the "winra archive connector"

The program runs on the server.

Download the file "winra-Tools-7.0.264.zip" and unpack it: Please copy the file "winraExporter.exe" and replace the existing file "winraExporter.exe".

If you use the connector as a Windows service, you have to copy the file "winraExporterSVC.exe" from the archive "Tools.zip" to the place of the existing file "winraExporterSVC.exe". To do this, you must stop the "winra-Export-Service" service before and restart it after the copying process.

7   On the client: Initial startup wizard

When you start winra for the first time after the update installation, the First Startup Wizard will open. Please check the information and register the MS Office AddIns in any case. These are required for communication with MS Outlook and MS Office.
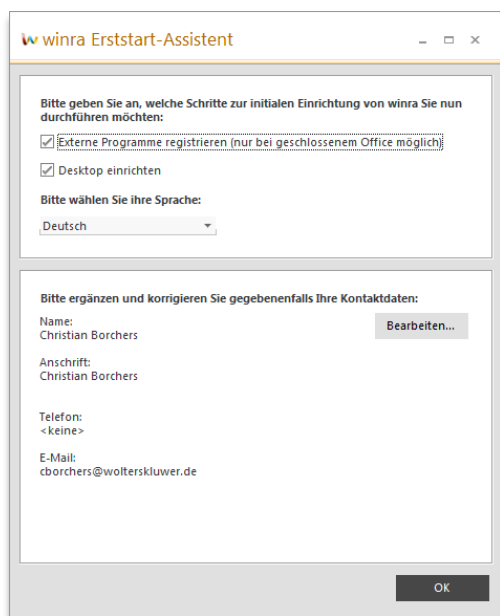
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8 Transport Encryption

winra normally uses the Microsoft OLE DB driver from Microsoft (SQLOLEDB). This driver is available in all Windows installations, so that you can work with winra without any additional installation. However, this database driver is obsolete. It uses an old TLS version and does not encrypt the complete data stream, but only the logon information.

To ensure secure encryption, this database driver must be replaced by the new OLE DB driver (MSOLEDBSQL) from Microsoft on all winra clients. This driver is not automatically included in Windows and must be distributed on all clients. Download link: https://www.microsoft.com/de-de/download/details.aspx?id=56730

Background information on the new driver:
https://blogs.msdn.microsoft.com/sqlnativeclient/2017/10/06/announcing-the-new-release-of-ole-db-driver-for-sql-server/

After distribution, the new driver must be configured in the winra5.config (in the winra\bin directory). To do this, please set the provider in the connection string to 'MSOLEDBSQL'. Example:

DatabaseConnection=Provider=MSOLEDBSQL;...

To activate the encryption of the data stream, please add the following parameter in the connection string:

Use Encryption for Data=true;

In addition, the 'Authentication' parameter should be set to 'SqlPassword' or 'ActiveDirectoryIntegrated' so that the driver assumes the most secure values possible by default and does not fall back on insecure settings for compatibility reasons.

If nothing else is configured, the SQL server uses self-signed certificates to establish TLS connections. There is the danger that the data stream can be redirected to another SQL server (man in the middle attack). This can be avoided by configuring a verifiable certificate on the SQL server. This certificate can be public or private, but the certificate authority must be verifiable from the client. Further information about this:

https://docs.microsoft.com/en-us/previous-versions/sql/sql-server-2012/ms191192(v=sql.110)?redirectedfrom=MSDN#configureserverconnections

The name of the certificate corresponds to the fully qualified name of the SQL server. And the server name must also be stored in the connection string in exactly the same way, otherwise a connection error will occur.

The parameter that controls the certificate check on the client is 'TrustServerCertificate'. If the 'Authentication' parameter is set, the default is 'false' and a certificate check is forced. TrustServerCertificate does not then need to be specified explicitly.

By setting a registry key under (HKLM), the certificate check for the Microsoft database driver can be additionally secured. This prevents the TrustServerCertificate setting in the connection string from being disabled.

Further documentation for this registry entry and examples for the new connection strings:

https://docs.microsoft.com/en-us/sql/connect/oledb/features/using-azure-active-directory?view=sql-server-ver15#encryption-and-certificate-validation

Example of a secure connection string with SQL Server authentication:

DatabaseConnection=Provider=MSOLEDBSQL;Password=<pwd>;Authentication=SqlP
assword;Persist Security Info=False;User ID=WinraUser;Initial Catalog=winra;Data
Source=winrasql01.wolterskluwer.com,1433;Network Library=dbmssocn;Use
Encryption for Data=true

8.1   Examples for Connection Strings

Examples of connection strings with SQL Server authentication:

Default with old driver	DatabaseConnection=Provider=SQLOLEDB;Password=<pwd>;Persist Security Info=False;User ID=WinraUser;Initial Catalog=winra;Data Source=winrasql01.wolterskluwer.com,1433;Network Library=dbmssocn
New driver	DatabaseConnection=**Provider=MSOLEDBSQL**;Password=<pwd>;Persist Security Info=False;User ID=WinraUser;Initial Catalog=winra;Data Source=winrasql01.wolterskluwer.com,1433;Network Library=dbmssocn
New driver and **data encryption** (only available with new driver)	DatabaseConnection=Provider=MSOLEDBSQL;Password=<pwd>;Persist Security Info=False;User ID=WinraUser;Initial Catalog=winra;Data Source=winrasql01.wolterskluwer.com,1433;Network Library=dbmssocn;**Use Encryption for Data=true**
New driver and data encryption and **SSL certificate verification** (only available with new driver)	DatabaseConnection=Provider=MSOLEDBSQL;Password=<pwd>;**Authentication=SqlPassword**;Persist Security Info=False;User ID=WinraUser;Initial Catalog=winra;Data Source=winrasql01.wolterskluwer.com,1433;Network Library=dbmssocn;Use Encryption for Data=true

Examples of connection strings with Windows authentication:

Default with old driver	DatabaseConnection=Provider=SQLOLEDB;Persist Security Info=False;Integrated Security=SSPI;Initial Catalog=winra;Data Source=winrasql01.wolterskluwer.com,1433;Network Library=dbmssocn
New driver	DatabaseConnection=**Provider=MSOLEDBSQL**;Persist Security Info=False;Integrated Security=SSPI;Initial Catalog=winra;Data Source=winrasql01.wolterskluwer.com,1433;Network Library=dbmssocn
New driver and **data encryption** (only available with new driver)	DatabaseConnection=Provider=MSOLEDBSQL;Persist Security Info=False; Integrated Security=SSPI;Initial Catalog=winra;Data Source=winrasql01.wolterskluwer.com,1433;Network Library=dbmssocn;**Use Encryption for Data=true**
New driver and data encryption and **SSL certificate verification** (only available with new driver)	DatabaseConnection=Provider=MSOLEDBSQL;Persist Security Info=False; **Authentication=ActiveDirectoryIntegrated**;Initial Catalog=winra;Data Source=winrasql01.wolterskluwer.com,1433;Network Library=dbmssocn;Use Encryption for Data=true

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The parameter that controls the certificate check on the client is actually 'TrustServerCertificate'. If the 'Authentication' parameter is set, the default is 'false' and a certificate check is forced. TrustServerCertificate' does not then need to be specified explicitly.