Connecting to LiveNote Realtime

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For assistance using Westlaw Case Notebook call **1-800-290-9378** or e-mail **westlaw.softwaresupport@thomsonreuters.com.**

For free reference materials, visit **store.westlaw.com/westlaw/guides**.

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Thomson Reuters Westlaw comprises industry leading online research, print products, software, tools, and services that help legal professionals perform their work faster and more efficiently, every day.

This guide provides the information needed to connect to LiveNote™ Realtime through Westlaw Case Notebook or Westlaw Case Notebook (Transcripts), both referred to in this guide as Case Notebook. For complete information on using Case Notebook, download a free copy of the *Westlaw Case Notebook User Guide* or the *Westlaw Case Notebook (Transcripts) User Guide* at store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.

If you are using LiveNote Stream™ to connect to Realtime, you must notify the court reporter *24 hours in advance* to view transcript text or *72 hours in advance* to view video and text. For more information on LiveNote Stream, see "Using LiveNote Stream" on page 2.

Connecting to LiveNote Realtime

Connecting with a Serial Connection

If you want to connect to LiveNote Realtime using serial cables, your computer must have a serial port. If your computer has only a USB port, you will need to provide a USB to serial adapter. (For information about serial adapters, see "USB to Serial Adapters" on page 12.) If a USB to serial adapter is not available, you can connect to LiveNote Realtime over the Internet via LiveNote Stream. Contact the court reporter to schedule the session.

Note You can test the serial connection on your computer before you attend a LiveNote Realtime session. See "Using Serial Writer" on page 5 for information on this feature.

To connect to LiveNote Realtime once all the cables are in place, complete these steps:

1. Access Case Notebook.
2. When the Open Case dialog box is displayed, click a case and click **OK**.
3. On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu. The Connect to Realtime dialog box is displayed (Figure 1).

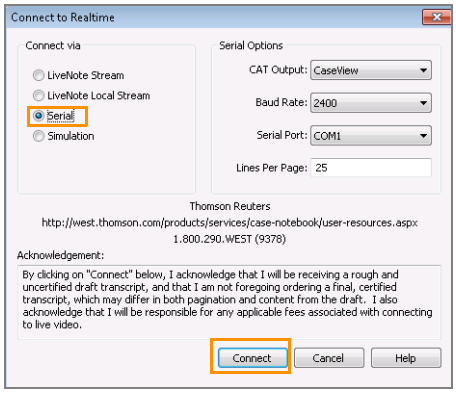


Figure 1. Connect to Realtime dialog box–Serial connection

4. Click **Serial**. The court reporter will give you the necessary settings for connecting to the reporter's Computer–Aided Transcription (CAT) system. You will need to know the required serial port setting.
5. Click **Connect**.

The transcript is titled Realtime by default and listed under Transcripts in the left pane. To change the title of the transcript, right-click it and click **Properties** on the menu. The Transcript Properties dialog box is displayed. Click the **Details** tab and type a different title for the transcript in the **Title** box, then click **OK**.

Using LiveNote Stream

LiveNote Stream allows you to connect to LiveNote Realtime via the Internet. You can access LiveNote Stream through Case Notebook software or through Microsoft® Internet Explorer®.

You must notify the court reporter *24 hours in advance* if you want to use LiveNote Stream to view transcript text or *72 hours in advance* to view video and text. LiveNote Central will send you an e-mail with the required username and password. For further information on planning a LiveNote Realtime session, download a free copy of *Quick Tips for Planning a LiveNote Realtime Session* at store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.

Note In order to view the video segment, you must use Internet Explorer and Windows Media Player 9 or later. You must also unblock pop-up windows.

ACCESSING LIVENOTE STREAM THROUGH CASE NOTEBOOK

To connect to LiveNote Realtime using LiveNote Stream through Case Notebook, complete these steps:

1. Access Case Notebook.
2. When the Open Case dialog box is displayed, click a case and click **OK**.

3. On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu. The Connect to Realtime dialog box is displayed (Figure 2).

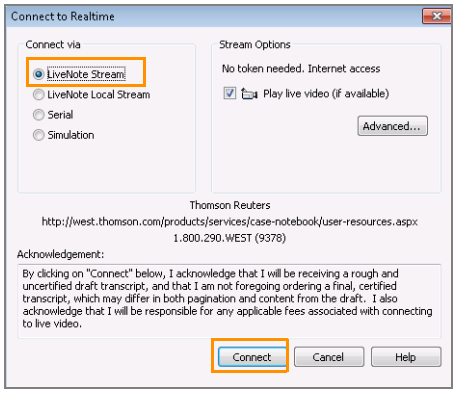


Figure 2. Connect to Realtime dialog box–LiveNote Stream connection

4. Click **LiveNote Stream**.
5. If video is available and you want to view it, select the **Play live video** check box.
6. Click **Connect** to display the LiveNote Stream Login dialog box.
7. Type the username and password sent to you by LiveNote Central and click **OK** to display the Connect to LiveNote Stream dialog box.
8. Click the session you want to attend and click **OK**. The Realtime deposition transcript text and video are displayed.

SENDING AN INSTANT MESSAGE

To send an instant message, complete these steps:

1. Type your message in the box under Stream in the left pane (Figure 3).
2. Click **Send** to send the message to your chat group. Or click an individual in the **Send To** list and click **Send**.

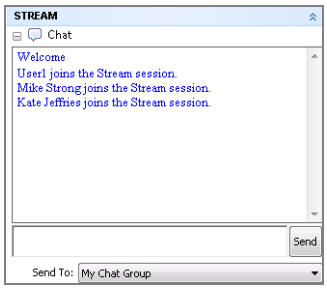


Figure 3. Instant message

ACCESSING LIVENOTE STREAM THROUGH INTERNET EXPLORER

You do not need Case Notebook software to access LiveNote Stream through Internet Explorer.

To access LiveNote Stream on the Internet, complete these steps:

1. Go to stream.livenote.com.
2. Type the username and password sent to you by LiveNote Central and click **Go** to display a list of your sessions.

3. Click the session you want to attend and click **Go**. The LiveNote Realtime session transcript text and video are displayed (Figure 4).

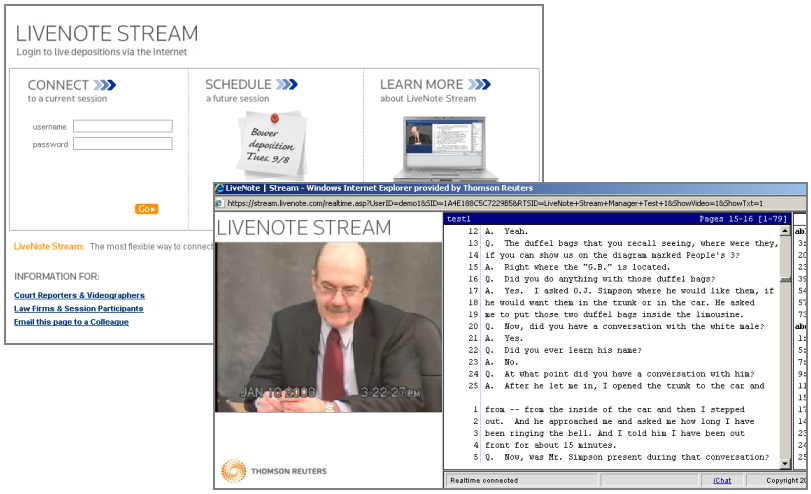


Figure 4. LiveNote Stream

ACCESS TO FEATURES IN LIVENOTE STREAM

When you view a LiveNote Realtime session using Internet Explorer, you are able to hear the audio and see the video and streaming transcript text. You can also stop and start the transcript text. When you view a LiveNote Realtime session using Case Notebook software, you have access to all the tools in Case Notebook. Below is a chart showing the features available with LiveNote Stream.

Westlaw Case Notebook Features	LiveNote Stream Through Internet Explorer	LiveNote Stream Through Westlaw Case Notebook
Audio	■	■
Video	■	■
Instant messaging	■	■
Streaming transcript text	■	■
Start and stop text	■	■
Word Index	■	■
Saved transcript		■
Quick Marks		■
Issue Marks		■
Annotations		■
Auto Tags		■
Full Text Search		■
Reports		■

Using LiveNote Local Stream

Case Notebook provides the ability to connect to LiveNote Realtime using a local area network with an Ethernet cable or a wireless router. The court reporter will provide a username, password, and the server IP address for each participant to log in to the session.

To connect to LiveNote Stream using your local network, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu. The Connect to Realtime dialog box is displayed (Figure 5).

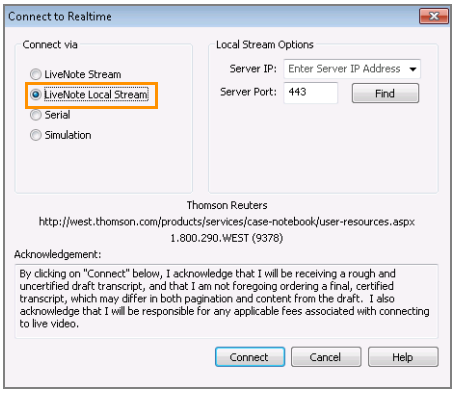


Figure 5. Connect to LiveNote Stream dialog box–LiveNote Local Stream connection

2. Click **LiveNote Local Stream**.
3. In the **Server IP** box, type the server IP address provided by the court reporter.

   Note You can click **Find** to retrieve the server IP address once the session has started, if necessary.
4. In the **Server Port** box, type the server port number.
5. Click **Connect**. The LiveNote Stream Login dialog box is displayed.
6. Type the username and password provided by the court reporter in the appropriate boxes.
7. Click **OK**.

Using Serial Writer

LiveNote Serial Writer is a utility that allows you to test your serial connection. It sends a test transcript from a test computer to the Case Notebook. To complete the test, you will need to install a cable between the two computers (you can use a serial-to-serial Laplink, real-time send/receive, or null modem cable), prepare the Case Notebook computer to receive the test transcript, access Serial Writer on the test computer, and run the Serial Writer utility.

Preparing the Case Notebook Computer

Once the cable is in place, you must prepare the Case Notebook computer to receive the test transcript by creating a test transcript and configuring the computer options.

CREATING A TEST TRANSCRIPT

To create a test transcript, complete these steps:

1. Access Case Notebook.
2. When the Open Case dialog box is displayed, click a case and click **OK**.

3. On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu. The Connect to Realtime dialog box is displayed (Figure 6).

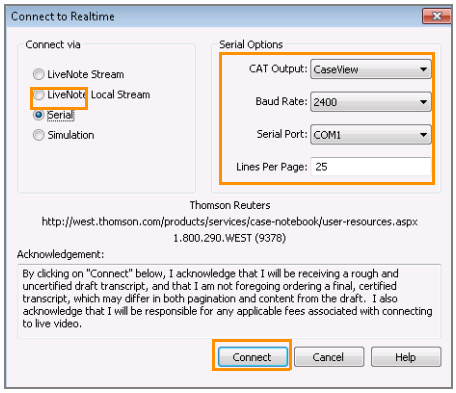


Figure 6. Connect to Realtime dialog box–Serial connection

CONFIGURING THE COMPUTER OPTIONS

To configure the computer options, complete these steps:

1. Click **Serial**.
2. Under Serial Options, the CAT output and baud rate must match those of the test computer.
   - In the **CAT Output** list, click **CaseView**.
   - In the **Baud Rate** list, click **2400**.
   - In the **Serial Port** list, click the port for the incoming connecting cable. This does not need to match the test computer's port.
3. Click **Connect** to receive the test transcript.

Note If you use tokens, a message indicating that you need a token to connect is displayed. You can test your serial connection free of charge. Call **1-800-290-9378** to receive a free token. For information on receiving tokens, see "Using Tokens" on page 7.

Accessing Serial Writer

Serial Writer must be installed on the test computer to access it. To install Serial Writer, go to store.westlaw.com/software/serial-writer/default.aspx to display the LiveNote Serial Writer download page. Follow the instructions to download Serial Writer.

To access Serial Writer, on the **Start** menu, click **All Programs**, then click **LiveNote**, **Tools**, and **Serial Writer** on the submenus. The LiveNote Serial Writer dialog box is displayed (Figure 7).

Testing the Serial Connection

To test the serial connection, complete these steps:

1. In the **Port Name** list, click the port for the outgoing connecting cable. This does not need to match the port for the Case Notebook.
2. Click **Selected Port Properties** to display the Port Properties dialog box. In the **Baud Rate** list, click **2400**. Then click **OK**.
3. Under Select a File, click the **ellipsis** button (...) to display the Open dialog box. Click **CAT Output = CaseView.sim** and click **Open**.
4. Under Data Transfer Options,
   - leave the Parse Every setting at the default of 300.
   - select the **Resend when end of file is reached** check box to have the test transcript continue transmitting until you stop it manually. If you do not select this check box, the test transcript stops transmitting automatically.
5. Under Data Transfer, click **Send the selected file to the selected port**. The test transcript begins transcribing on the Case Notebook computer. The data transfer ceases when the end of the transcript has been reached unless you selected the **Resend when end of file is reached** check box.
6. Click **Done** to stop the test.

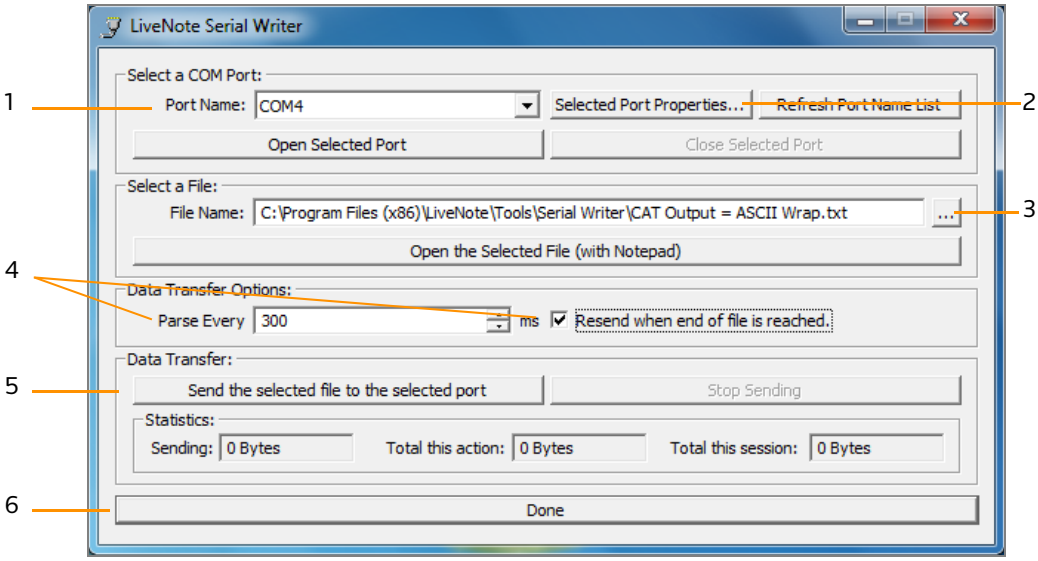


Figure 7. LiveNote Serial Writer dialog box

Using Tokens

Managing Tokens

You can use an electronic token to connect to LiveNote Realtime with a serial connection. This ensures that Case Notebook software is compliant with real-time patents. You can

- download tokens from your firm's account to your computer
- transfer tokens from your computer to another Case Notebook user
- transfer tokens to your computer from another Case Notebook user, a court reporter, or LiveNote by calling 1-800-548-3668

- view a list of token transactions that have been carried out on your computer

Note You do not need tokens if you have a subscription that includes unlimited LiveNote Realtime.

Downloading Tokens to Your Computer

You can download tokens from your firm's account over the Internet. Your firm will give you the required account number and personal identification number (PIN). To download tokens, complete these steps:

1. Access Case Notebook.
2. When the Open Case dialog box is displayed, click a case and click **OK**.
3. To manage tokens, do one of the following:
   - On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu to display the Connect to Realtime dialog box. Click **Serial**, then click **Manage Tokens**.
   - On the **Tools** menu, click **Options** to display the Options dialog box. Click the **Realtime** tab, then click **Manage Tokens**.

   The Manage Tokens dialog box is displayed. The number of tokens currently on your computer is shown in the Realtime Tokens on this Computer box at the top of the dialog box.
4. Click the **Download Tokens** tab (Figure 8).

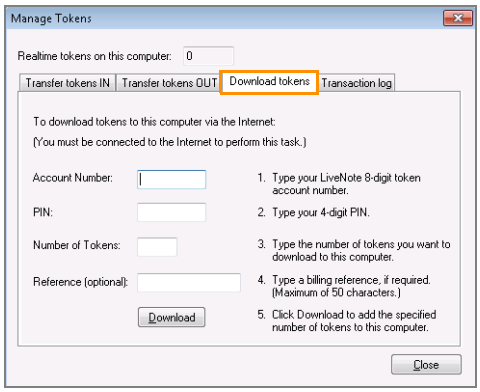


Figure 8. Manage Tokens dialog box–Download Tokens tab

5. In the **Account Number** box, type your firm's token account number.
6. In the **PIN** box, type your PIN.
7. In the **Number of Tokens** box, type the number of tokens you want to download.
8. If required, in the **Reference** box, type a billing reference. This is for your firm's use only and can be up to 30 characters in length.
9. Click **Download**. The tokens are downloaded to your computer.
10. A message confirming that the download was successful is displayed. Click **OK**.
11. Click **Close** to close the Manage Tokens dialog box.

Transferring Tokens from Your Computer to Another User

You can transfer tokens from your computer to another Case Notebook user's computer. To transfer tokens from your computer, complete these steps:

1. Access Case Notebook.
2. When the Open Case dialog box is displayed, click a case and click **OK**.

3. To manage tokens, do one of the following:
   - On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu to display the Connect to Realtime dialog box. Click **Serial**, then click **Manage Tokens**.
   - On the **Tools** menu, click **Options** to display the Options dialog box. Click the **Realtime** tab, then click **Manage Tokens**.

   The Manage Tokens dialog box is displayed. The number of tokens currently on your computer is shown in the Realtime Tokens on this Computer box at the top of the dialog box.
4. Click the **Transfer Tokens Out** tab (Figure 9).

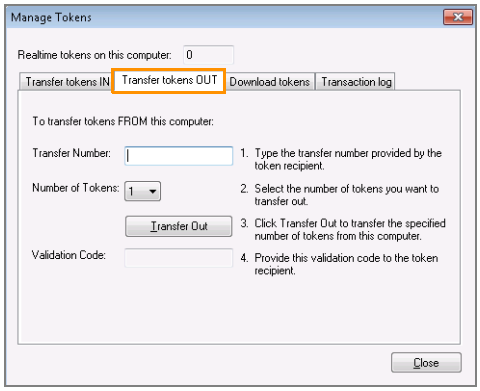


Figure 9. Manage Tokens dialog box–Transfer Tokens Out tab

5. In the **Transfer Number** box, type the nine-digit transfer number given to you by the token recipient. This number is shown on the recipient's computer in the Transfer Number box on the Transfer Tokens In tab.
6. In the **Number of Tokens** list, click the number of tokens you want to transfer to the recipient. This number must match the number of tokens shown on the recipient's computer in the Number of Tokens box on the Transfer Tokens In tab.
7. Click **Transfer Out**.
8. A message confirming the transfer was successful is displayed. Click **OK**.
9. A validation code is generated and displayed in the Validation Code box. Give this validation code to the token recipient.

   Note To receive the tokens, the recipient needs to type the validation code in the Validation Code box on the Transfer Tokens In tab on his or her computer.
10. Once the recipient has received the tokens on his or her computer, click **Close** to close the Manage Tokens dialog box.

    Note Do not close the Manage Tokens dialog box until the token recipient has received the tokens on his or her computer.

Transferring Tokens to Your Computer

You can transfer tokens to your computer from a court reporter, another Case Notebook user, or LiveNote. To transfer tokens to your computer, complete these steps:

1. Access Case Notebook.
2. When the Open Case dialog box is displayed, click a case and click **OK**.
3. To manage tokens, do one of the following:

- On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu to display the Connect to Realtime dialog box. Click **Serial**, then click **Manage Tokens**.
- On the **Tools** menu, click **Options** to display the Options dialog box. Click the **Realtime** tab, then click **Manage Tokens**.

The Manage Tokens dialog box is displayed. The number of tokens currently on your computer is shown in the Realtime Tokens on this Computer box at the top of the dialog box.

4. Click the **Transfer Tokens In** tab (Figure 10).

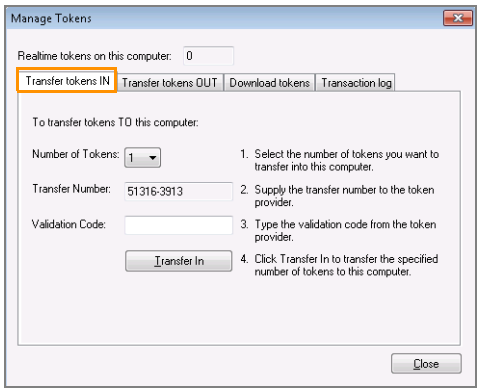


Figure 10. Manage Tokens dialog box–Transfer Tokens In tab

5. In the **Number of Tokens** list, click the number of tokens that you are transferring to your computer. This number must match the number of tokens shown in the Number of Tokens box on the Transfer Tokens Out tab on the token provider's computer. A transfer number is generated and displayed in the Transfer Number box.
6. Give the transfer number to your token provider. The token provider uses this number to generate a validation code that he or she will give to you for the token transfer.
7. In the **Validation Code** box, type the validation code the token provider gives you.
8. Click **Transfer In**.
9. If the validation code is correct, the tokens are transferred to your computer and a message confirming that the transfer was successful is displayed. Click **OK**.
10. Click **Close** to close the Manage Tokens dialog box.

Viewing the Token Transaction Log

You can view a list of the token transactions that have occurred on your computer. To view the token transaction log, complete these steps:

1. On the **Tools** menu in Case Notebook, click **Options** to display the Options dialog box.
2. Click the **Realtime** tab, then click **Manage Tokens**. The Manage Tokens dialog box is displayed. The number of tokens currently on your computer is shown in the Realtime Tokens on this Computer box at the top of the dialog box.

3. Click the **Transaction Log** tab (Figure 11).

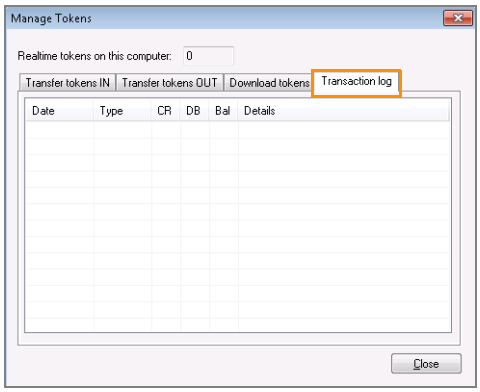


Figure 11. Manage Tokens dialog box–Transaction Log tab

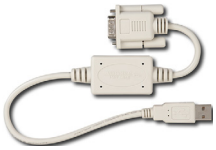
The transaction log contains the following information:

- **Date**—the date on which the transaction was completed
- **Type**—the type of transaction
  - **Download**—tokens downloaded from your firm's LiveNote Central account
  - **Use**—a token was used
  - **In**—tokens transferred to your computer
  - **Out**—tokens transferred from your computer
  - **Judicial**—judicial tokens, available to state and federal judges
  - **Adjust**—tokens were found on your computer and added to the transaction log, but transaction details are no longer available, e.g., you uninstalled and reinstalled Case Notebook
- **CR**—the number of tokens that were added to your computer by the transaction
- **DB**—the number of tokens that were transferred from your computer by the transaction
- **Bal**—the number of tokens on your computer after the transaction was completed
- **Details**—details of the transaction
  - **A/C**—the account number
  - **TN**—the transfer number
  - **VC**—the validation code used
  - **Consumed a token**—indicates a token was used
  - **Judicial balance**—the number of judicial tokens on the computer
  - whether tokens were found on your computer and added to the transaction log
  - the billing reference, if any

USB to Serial Adapters

Newer laptops often do not contain serial (9-pin) ports. Below is a list of USB to serial adapters you can use to connect to a LiveNote Realtime session through the USB port. The adapters are listed from most recommended to least recommended. You can purchase most of these adapters at computer or electronics stores or on the web from the manufacturers or computer retailers.

Manufacturer	Image	Compatibility and Notes
IOGear www.iogear.com Part #GUC232A		compatible with Windows 98SE, ME, 2000, and XP; Windows Vista; and Windows 7 (XP driver supports Windows Vista)
Sewell www.sewelldirect.com Part SW-1301		compatible with Windows 98SE, ME, 2000, and XP; Windows Vista; and Windows 7 (with latest driver download)
Aten www.aten.com Part #UC232A		compatible with Windows 98, ME, 2000, 2003, and XP and Windows Vista
Targus www.targus.com Part #PA088UZ		compatible with Windows 98, ME, 2000, and XP and Windows Vista
Hawking www.hawkingtech.com HUC232S		compatible with Windows 98SE, ME, and 2000
Belkin www.belkin.com Part #F5U409V1		compatible with Windows 98, 98SE, ME, 2000, and XP

Manufacturer	Image	Compatibility and Notes
Belkin www.belkin.com Part #F5U103		compatible with Windows 95, 98, ME, 2000, and XP **no longer manufactured**
Belkin www.belkin.com Part #F5U109		compatible with Windows 98, 98SE, ME, 2000, and XP **no longer manufactured**
Dynex www.bestbuy.com Part #DX-UBDB9		compatible with Windows 98, ME, 2000, and XP **not recommended for use with Case Notebook**
Keyspan www.keyspan.com Part #USA-19HS		compatible with Windows 98, ME, 2000, and XP; Windows Vista; and Windows 7 **not recommended for use with Case Notebook**
Radio Shack www.radioshack.com Part #26-183		compatible with Windows 98, 98SE, ME, 2000, and XP **no longer manufactured** **not recommended for use with Case Notebook**

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