WEST LIVENOTE USER GUIDE

SEPTEMBER 2011

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WEST LIVENOTE USER GUIDE

SEPTEMBER 2011

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West LiveNote Assistance

If you have general or technical questions about West LiveNote, call West LiveNote Customer Technical Support at 1-800-290-9378, Monday through Friday, 7:00 a.m. to 7:30 p.m. central time. You can also send an e-mail message to west.livenote@thomson.com.

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Reference Materials

To browse and order free West LiveNote reference materials, visit west.thomson.com/support /user-guide/livenote-case-notebook.aspx. West LiveNote also contains valuable online Help.

About This Guide

In this guide, the graphics and step-by-step instructions are based on using West LiveNote. Because of the evolving nature of this technology, there may be changes to interfaces and functionality that are not reflected in this documentation.

Information in this guide is current through September 2011 (version 2.6).

West

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Contents

1 Introduction

West LiveNote is software that allows you to view and work with deposition transcripts.

File Types for Importing Transcripts

You can import the following types of transcript files into West LiveNote:

- E-Transcript files (PTX or EXE)—transcript only format provided by court reporters; may include court reporter's signature
- ASCII (text only) files—transcript only format
- Portable Transcript (PTF) files—used to move a transcript with annotations to another program that will accept that file type or another West Case Notebook or West LiveNote computer
- LiveNote Evidence Format™ (LEF™) files—contain the transcript with linked exhibit files; may contain synchronized video
- Publisher Bundle (bundle.xml) files—contain the transcript with linked exhibit files; may contain synchronized video
- E-Transcript Bundle (PTZ) files—created with West Publisher version 5 or later; contain the transcript with linked exhibit files; may contain synchronized video
- Extensible Markup Language (XML) files—contain the transcript with linked exhibit files; may contain synchronized video
- CT Summation (TRN) files
- Timaro Technologies Post-Production Time-Stamp (PTS) files

Getting Help

Online Help is available in West LiveNote to assist you. Simply click **Contents** on the **Help** menu.

You can also easily access free online lessons and webinars to help you learn West LiveNote. On the **Help** menu, click **Online Lessons** to display the West eLearning Center page. Once you have logged in, click **West Case Notebook** in the left frame.

2 Managing Cases

Creating a New Local Case

Cases in West LiveNote can be created for one person to use (local cases), or they can be created through the West LiveNote Administration module to be available on a network so they can be shared (secure cases). Local cases can be imported through the West LiveNote Administration module to also make them shareable.

To create a new case, follow these steps:

1. Access West LiveNote to display the Open Case dialog box (Figure 2-1).

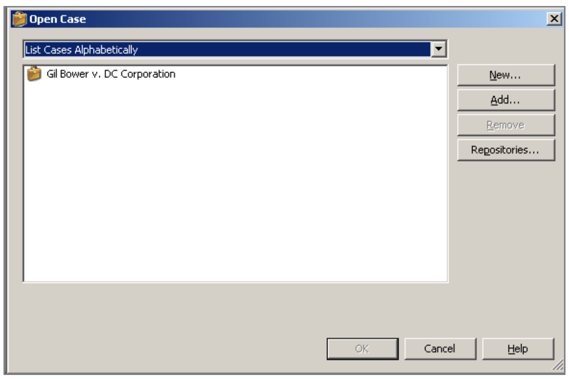


Figure 2-1. Open Case dialog box

2. Click **New** to display the Save As dialog box.
3. Select the location to use for storage of the case; type the file name, e.g., **smithvjones**; and click **Save**. The New Case Properties dialog box is displayed.
4. Type the name of the case, e.g., **Smith v Jone**s, in the *Name* text box.
5. Click **OK**.

The case window, which lists all the transcripts for the case, is displayed (Figure 2-2).

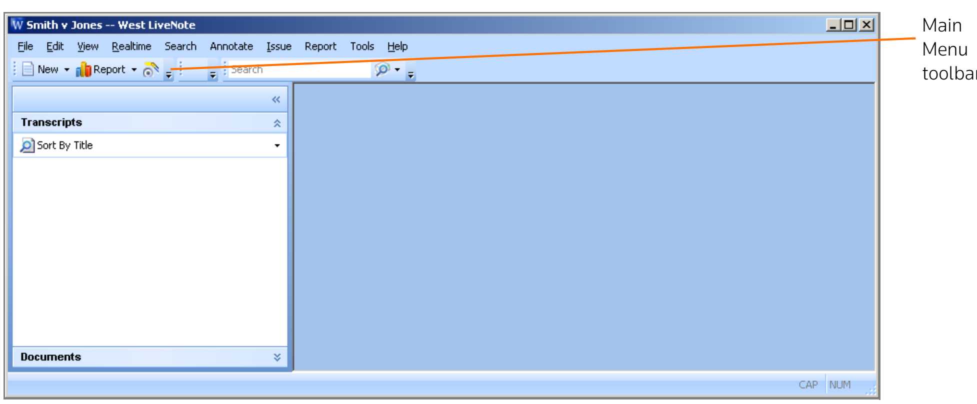


Figure 2-2. Case window

CREATING A NEW CASE FROM AN OPEN CASE

To create a new case from an open case, complete these steps:

1. Click the **New** arrow on the Main Menu toolbar and choose **Case** from the menu. The Save As dialog box is displayed.
2. Select the location to use for storage of the case; type the file name, e.g., **smithvjones**; and click **Save**. The New Case Properties dialog box is displayed.
3. Type the name of the case, e.g., **Smith v Jone**s, in the *Name* text box.
4. Click **OK**.

Opening a Local Case

To open a case, choose **Open Case** from the File menu to display the Open Case dialog box. Select your case from the list and click **OK**.

Importing a Case

To import a case, complete these steps:

1. Click the **New** arrow, then choose **Case (from File)** from the menu. The Open dialog box is displayed.
2. Select your case and click **Open**. The Save As dialog box is displayed.
3. Type a name for the file in the *File name* text box.
4. Click **Save**. The message *Would you like to add the new case to your case list8* is displayed. Click **Yes**. The case is displayed in the case window.

Opening a RealLegal Binder Case

You can open a RealLegal Binder case, version 5 or later, in West LiveNote. To open a RealLegal Binder case, complete these steps:

1. Choose **Open Case** from the File menu to display the Open Case dialog box.
2. Click **Add**. The Open dialog box is displayed.
3. Select the RealLegal Binder Case (PXL) file you want to import and click **Open**.
4. The message *This case was created with RealLegal Binder. It must be imported before it can be used. Do you want to continue?* is displayed. Click **Yes**. The Save As dialog box is displayed.
5. Type a name for the file in the *File name* text box and click **Save**. The case is listed in the Open Case dialog box.
6. Select the case and click **OK**.

Note The RealLegal Binder case opens as a local case with no assigned users. For further information on the conversion of RealLegal Binder cases to West LiveNote cases, see Appendix B.

Accessing Secure Cases

Note

- If you are working on a secure case with other users, all users must use the same version of West LiveNote. For example, if a secure case is upgraded to West LiveNote version 2.5, all users working on the case must use West LiveNote version 2.5.
- If you are working in a West LiveNote 2.5 case, then revert to using West LiveNote version 1.0, you must manually rebuild the search index for the case. To rebuild the search index, choose **Advanced**, **Rebuild Search Index** from the Tools menu.

To access a secure case, complete these steps:

1. Access West LiveNote. Or in an open case, choose **Open Case** from the File menu. The Open Case dialog box is displayed (Figure 2-3).

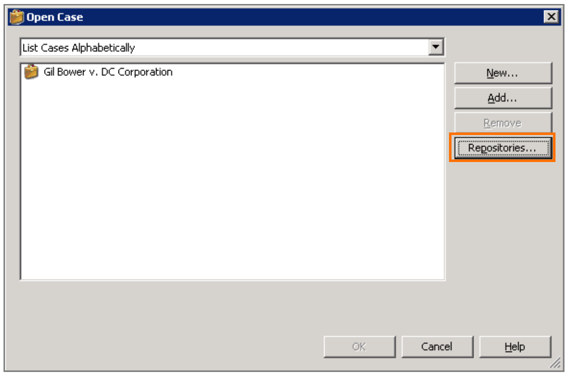


Figure 2-3. Open Case dialog box

2. Click **Repositories**. The Repositories dialog box is displayed (Figure 2-4).

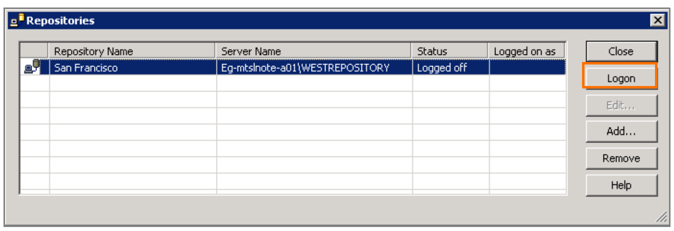


Figure 2-4. Repositories dialog box

3. Select the repository that you want to log on to and click **Logon**. The Logon to [Repository Name] dialog box is displayed (Figure 2-5).

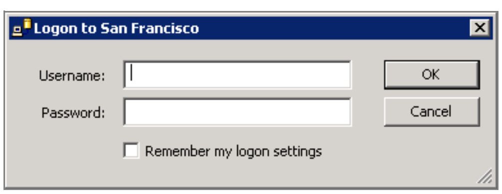


Figure 2-5. Logon to [Repository Name] dialog box

4. Type your username and the password that is assigned to you in West LiveNote Administration in the *Username* and *Password* text boxes.
5. Select the **Remember my logon settings** check box if you want West LiveNote to remember your username and password.

6. Click **OK**. The Repositories dialog box is redisplayed (Figure 2-6).

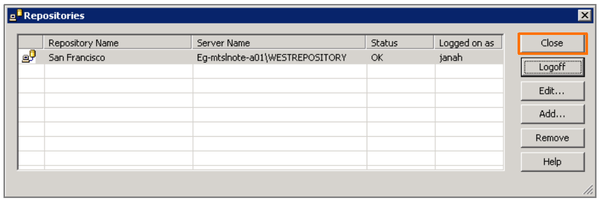


Figure 2-6. Repositories dialog box

7. Click **Close**. The Open Case dialog box is redisplayed with a list of the cases to which you are assigned (Figure 2-7).

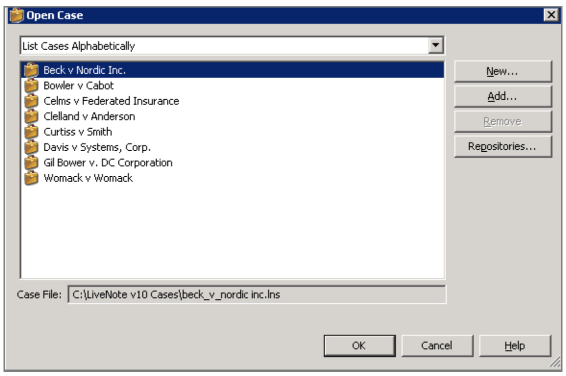


Figure 2-7. Open Case dialog box

Note Two types of case icons may be displayed:

- A brown case icon ( ) indicates a local case or a secure case that is currently being accessed through the network.
- A brown and blue case icon ( ) indicates a secure case that was replicated offline and is currently being accessed locally.

To view only secure cases, choose **List Cases by Repository** from the drop-down list at the top of the dialog box, then click the plus symbol (**+**) next to the repository containing the cases you want to view.

8. Select your case and click **OK**.

ACCESSING SECURE CASES THROUGH WEST LIVENOTE RAS

West LiveNote RAS (remote access server) provides remote access to your West LiveNote cases via the Internet. When you access a case remotely, most of the features in West LiveNote are available. When you finish working on a case, your changes are saved to the server. After you close a remote case, you must log on to another remote session to access the case again.

When you use West LiveNote RAS, you cannot:

- copy a case
- administer remote cases using West LiveNote Administration
- connect to Realtime

Note To connect to Realtime in a case you access through West LiveNote RAS, you must replicate the case offline.

To access a secure case through West LiveNote RAS, complete steps 1 through 8 above.

Viewing a List of Favorite Secure Cases

When you access secure cases in West LiveNote, all of the cases to which you are assigned are listed in the Open Case dialog box. You can add one or more of these cases to your list of favorite cases, then view only those cases when you access West LiveNote.

To view your list of favorite cases, complete these steps:

1. Access secure cases. The Open Case dialog box is displayed with the list of the cases to which you are assigned (Figure 2-8).

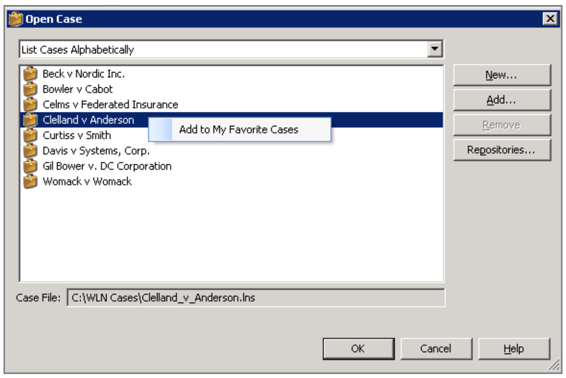


Figure 2-8. Open Case dialog box

2. Right-click the case you want to add to your list of favorite cases, e.g., **Clelland v Anderson**, and click **Add to My Favorite Cases**.
3. Choose **List My Favorite Cases** from the drop-down list at the top of the dialog box. Your list of favorite cases is displayed (Figure 2-9).

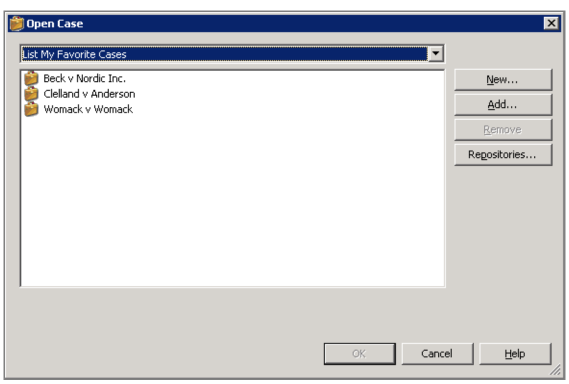


Figure 2-9. List of favorite cases

Replicating Cases Offline and to the Network

Note If you replicate a case offline on one computer and want to access the case via the network on a different computer, you must have a separate username assigned to you in the repository for each computer.

REPLICATING A CASE OFFLINE

You can work on a secure case off the network by replicating the case offline in West LiveNote. To replicate a secure case that you are currently working on offline, complete these steps:

1. From the File menu, choose **Replicate Case Offline**. The Replication Wizard–Case Data dialog box is displayed (Figure 2-10).

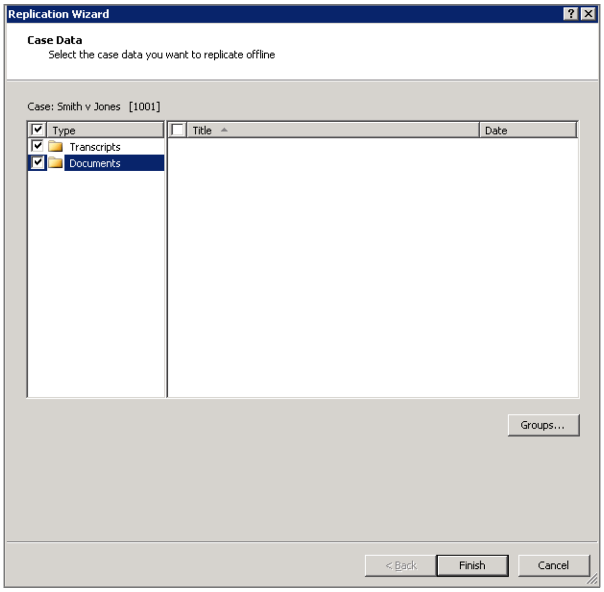


Figure 2-10. Replication Wizard–Case Data dialog box

2. By default, all transcripts and documents are selected. To exclude a document type from being replicated offline, clear its check box. To exclude particular data from the report, click the document type containing the data, then clear the check boxes for the data you want to exclude.
3. Click **Groups** to add the data you selected to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the data and click **OK**.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 34.
4. Click **Finish**. The Cases Replicated to Offline dialog box is displayed, informing you that the case was successfully replicated offline.
5. Click one of the following:
   - **Open Case**. The case is displayed in the left pane.
   - **Close**. The case is closed.

REPLICATING A CASE TO THE NETWORK

To replicate a case you are currently working on to the network, complete these steps:

1. From the File menu, choose **Replicate Case Online**. The Cases Replicated to Network dialog box is displayed.
2. Click one of the following:
   - **Open Case**. The case is displayed in the left pane.
   - **Close**. The case is closed.

REPLICATING MULTIPLE CASES OFFLINE

To replicate multiple cases offline, you must first change your replication options, then close West LiveNote and select the cases you want to replicate offline. To replicate multiple cases offline, complete these steps:

1. Choose **Options** from the Tools menu. The Options dialog box is displayed.
2. On the Confirmation tab, select the **Replicate offline on closing West LiveNote** check box, then click **OK**.
3. Close West LiveNote. The Replication Wizard–Cases dialog box is displayed (Figure 2-11).

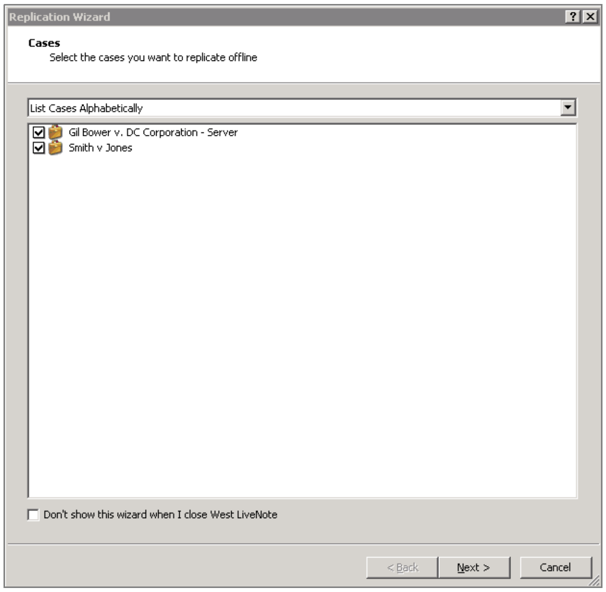


Figure 2-11. Replication Wizard–Cases dialog box

4. By default, all the cases on the network that are assigned to you are selected. To exclude a case from being replicated offline, clear its check box.
5. Click **Next**. The Replication Wizard–Case Data dialog box for the first case you selected is displayed.
6. By default, all transcripts and documents are selected. To exclude a document type from being replicated offline, clear its check box.
7. Click **Groups** to add the data you selected to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the data and click **OK.**

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 34.
8. Click **Next**. If you selected more than one case, the Replication Wizard–Case Data dialog box for the next case you selected is displayed.
9. Repeat steps 6–8 for each case you want to replicate offline.
10. When you have finished selecting the document types for all the cases you want to replicate offline, click **Finish**. The Cases Replicated to Offline dialog box is displayed, informing you that the cases were successfully replicated offline.
11. Click **Close**. West LiveNote is closed.

REPLICATING MULTIPLE CASES TO THE NETWORK

1. If you replicated cases offline, the next time you access West LiveNote, the Replication Wizard–Offline Cases dialog box is displayed (Figure 2-12).

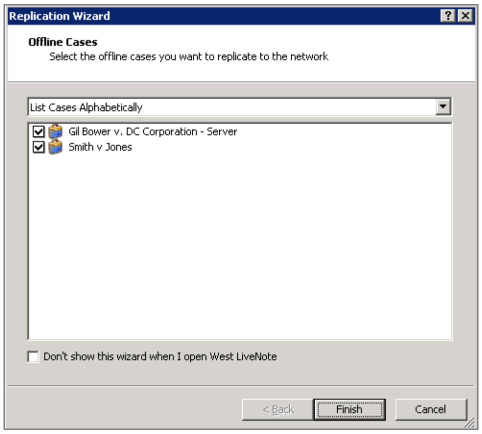


Figure 2-12. Replication Wizard–Offline Cases dialog box

2. By default, all the cases that you replicated offline are selected. To exclude a case from being replicated to the network, clear its check box.
3. Click **Finish**. The Cases Replicated to Network dialog box is displayed.

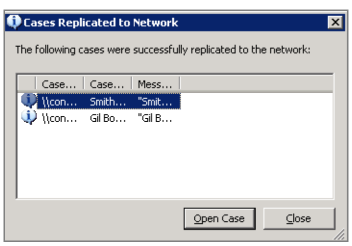


Figure 2-13. Cases Replicated to Network dialog box

4. Select a case, then click one of the following:
   - **Open Case**. The case is displayed in the left pane.
   - **Close**. The case is closed.

Changing Replication Options

West LiveNote has replication options that prompt you to replicate the case offline when you close West LiveNote or replicate the case to the network when you open West LiveNote. To change these options, complete these steps:

1. From the Tools menu, choose **Options**. The Options dialog box is displayed (Figure 2-14).

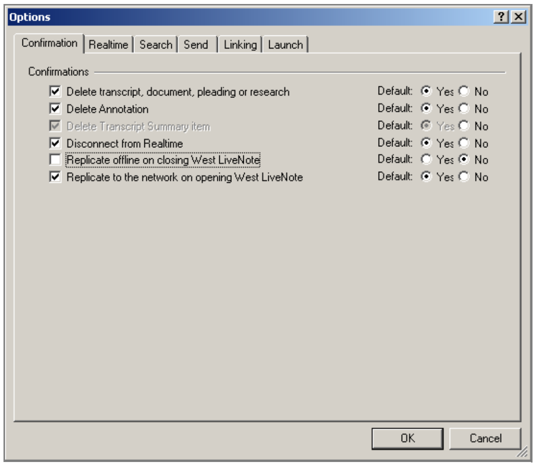


Figure 2-14. Options dialog box

2. Select the **Replicate offline on closing West LiveNote** check box, if desired.
3. Clear the **Replicate to the network on opening West LiveNote** check box, if desired.
4. Make your selection the default, if desired.
5. Click **OK**.

Creating a Case Report

This report includes the names of transcripts and any comments about the transcripts. To create a Case report, complete these steps:

1. Click the **Report** button (
) on the Main Menu toolbar, then choose **Case** from the menu. The Case Report Properties dialog box is displayed (Figure 2-15).By default, all transcripts and documents are selected. To exclude a document type from the report, clear its check box. To exclude particular data from the report, click the document type containing the data, then clear the check boxes for the data you want to exclude.

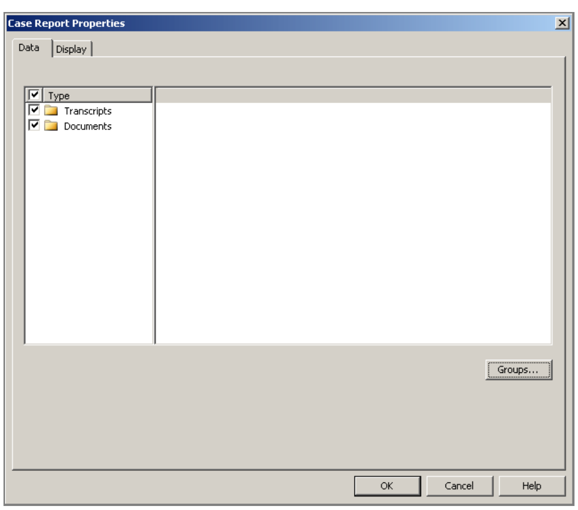


Figure 2-15. Case Report Properties dialog box

2. Click **Groups** to include only the data in a data group in your report. Select the group you want to include in your report and click **OK**. For further information on data groups, see "Working with Data Groups" on page 34.
3. Click the **Display** tab to view a list of display options. Type a title for the report in the *Title* text box, if desired. Then select or clear the appropriate check boxes.
4. Clear the **Include cover page when printing or saving** check box, if desired.
5. Click **OK**. The Case report is listed under *Report* in the left pane and the text of the report is displayed on the Report tab in the right pane.

3 Managing Transcripts

Importing a Transcript

To import a transcript, complete these steps:

1. Click the **New** arrow on the Main Menu toolbar and choose **Transcript (from File)** from the menu. The Import Wizard–Transcript File dialog box is displayed.
2. Click **Browse** to display the Browse for Transcript Files dialog box.
3. Choose a file type from the *Files of type* drop-down list. Then select your transcript and click **Open**. The Import Wizard–Transcript File dialog box is redisplayed.
4. Click **Next**. A message warning that the transcript has not been signed electronically may be displayed. Click **Continue**. The Import Wizard–Transcript Properties dialog box is displayed (Figure 3-1).

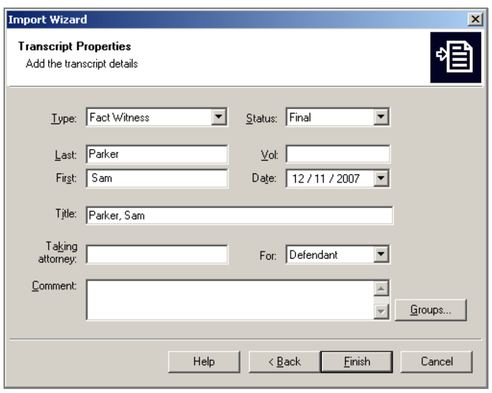


Figure 3-1. Import Wizard–Transcript Properties dialog box

5. Type a comment in the *Comment* text box, if desired.
6. Click **Groups** to add the transcript to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the data and click **OK.** The Import Wizard–Transcript Properties dialog box is redisplayed.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 34.

7. Click **Finish**. The Import Wizard–Import Summary dialog box is displayed. To import another transcript, click **Again**. If you do not want to import another transcript, click **Close**. The transcript is listed under *Transcripts* in the left pane and the text of the transcript is displayed in the right pane (Figure 3-2).

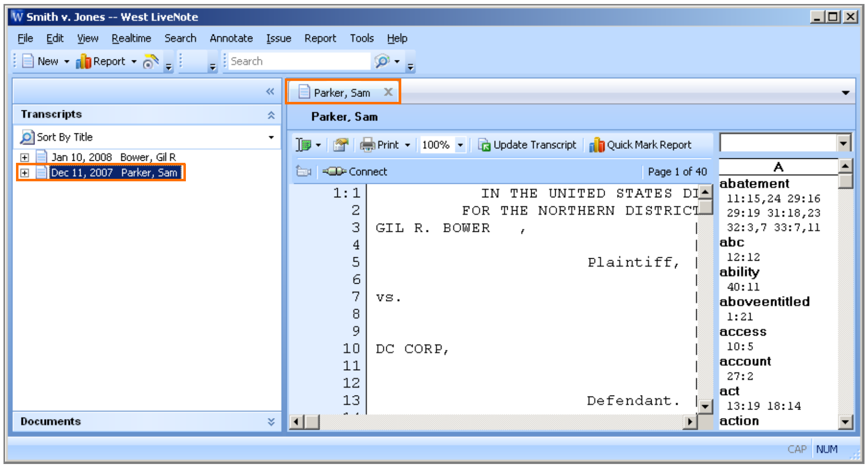


Figure 3-2. Imported transcript

Note If you see next to the transcript, the transcript has been signed.

Opening an Existing Transcript

To open a transcript, complete these steps:

1. If necessary, click **Transcripts** in the left pane to display a list of all transcripts in the case.
2. Double-click the transcript you want to open. The text of the transcript is displayed in the right pane.

Closing a Transcript

To close a transcript so that it is no longer displayed in the right pane, click the **Close** button ( ) on the transcript's tab.

Deleting a Transcript

To delete a transcript, right-click the transcript in the left pane and choose **Delete** from the menu. The message *Permanently delete the selected Transcript and all associated Annotations?* is displayed. Click **Yes**.

Printing a Transcript with Annotations

You can display annotations, Quick Marks, and Issue Marks in printed transcripts. For condensed transcripts, you can also print annotations, including notes and author information, in the footer of the document. To print a transcript with annotations in the footer of the document, complete these steps:

1. Open the transcript you want to print.
2. Click the **Print** arrow on the toolbar above the transcript and choose **Print Preview Condensed** from the menu. The Print Preview dialog box is displayed.
3. Click the **Properties** icon ( ) to display the Page Setup–Condensed Transcript dialog box (Figure 3-3).

4. Click the **Annotations** tab (Figure 3-3).

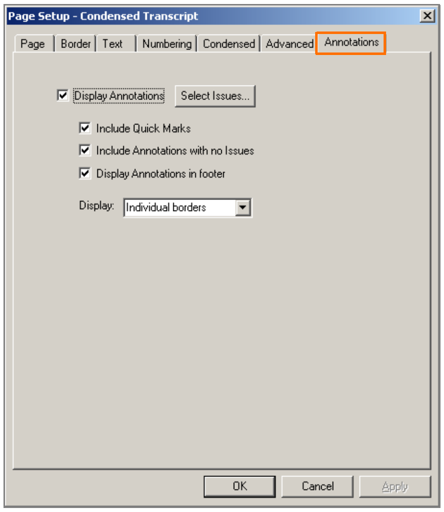


Figure 3-3. Page Setup–Condensed Transcript dialog box–Annotations tab

5. Select the **Display Annotations** check box, if necessary.
6. To include or exclude annotations associated with specific issues from the printed transcript, click **Select Issues**. The Select Issues dialog box is displayed. Issues will be listed in this dialog box only if they have previously been created. See "Working with Issues" on page 20.
7. Select or clear the check boxes next to the issues you want to include or exclude and click **OK**. The Page Setup–Condensed Transcript dialog box is redisplayed.
8. Clear the **Include Quick Marks** check box, if desired.
9. Clear the **Include Annotations with no Issues** check box, if desired.
10. Choose how you want the annotations displayed in the transcript text from the *Display* drop-down list.

11. Click **OK**. The transcript with its annotations is displayed (Figure 3-4).

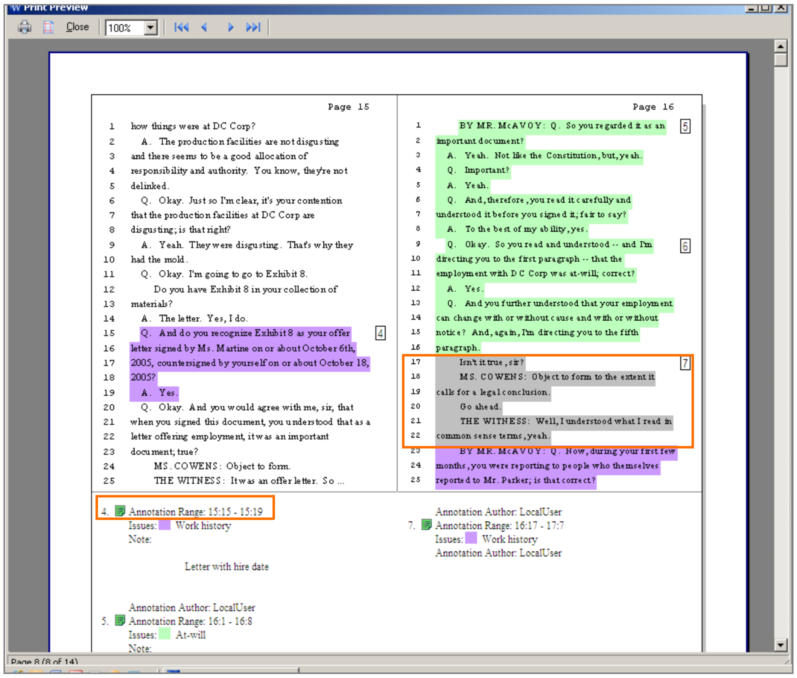


Figure 3-4. Preview of transcript with annotations

Note Overlapping annotations are highlighted in gray. The Annotation Range is available in the footer to help you determine the length of the overlapping annotations.

12. Click the **Print** icon to print the transcript.

4 Updating Transcripts

West LiveNote transcripts can be updated using the following types of files:

- E-Transcript (PTX or EXE) files—files containing transcript text and, if the transcript is signed, the signature details
- ASCII (text only) files—files containing transcript text, usually received from the court reporter
- Portable Transcript (PTF) files—files containing transcript text and annotations, usually received from another West LiveNote user
- LiveNote Evidence Format (LEF) files—files containing transcripts, exhibits, exhibit links, and possibly synchronized video

Note You can also import CT Summation (TRN) files and Timaro Technologies Post-Production Time-Stamp (PTS) files.

Any annotations, including Quick Marks and Issue Marks, are automatically transferred to the updated transcript. No work product will be lost because all annotations are linked to the transcript text, not to the page and line references. Therefore, annotations made in the old transcript are simply transferred to the same text location in the updated transcript.

Starting the Updating Process

To update an transcript, you must first assign draft status to the transcript. To assign draft status to a transcript, complete these steps:

1. Click the **Transcript Properties** button ( ) on the toolbar above a transcript in the right pane to display the Transcript Properties dialog box.
2. Choose **Draft** from the *Status* drop-down list.
3. Click **OK**.

Updating with a PTX or EXE File

1. Click the **Update Transcript** button (Update Transcript) on the toolbar above a transcript in the right pane. The Update Transcript–Transcript File dialog box is displayed.
2. Click **Browse** to display the Browse for Transcript Files dialog box.
3. Select the PTX or EXE file that was sent to you and click **Open**. The Update Transcript–Transcript File dialog box is redisplayed.
4. Click **Next**. A message warning that the transcript has not been signed electronically may be displayed. Click **Continue**. The Update Transcript–Transcript Properties dialog box is displayed.
5. Click **Finish**. The Update Transcript–Update Completed dialog box is displayed.
6. Click **Close**.

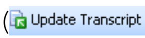
Updating with an ASCII File

1. Click the **Update Transcript** button (Update Transcript) on the toolbar above a transcript in the right pane. The Update Transcript–Transcript File dialog box is displayed.
2. Click **Browse** to display the Browse for Transcript Files dialog box.
3. Select the ASCII file that was sent to you and click **Open**. (Different CAT systems create different extensions on ASCII files.) The Update Transcript–Transcript File dialog box is redisplayed.

4. Click **Next**. A message warning that the transcript has not been signed electronically may be displayed. Click **Continue**. The Update Transcript–Import Details dialog box is displayed.
5. Click **Next**. The Update Transcript–Import Confirm dialog box is displayed.
6. Click **Next**. The Update Transcript–Transcript Properties dialog box is displayed.
7. Click **Finish**. The Update Transcript–Update Completed dialog box is displayed.
8. Click **Close**.

Updating with a PTF File

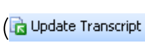
Use this method when you want to merge two sets of annotations into one transcript when replication is not available.

1. Click the **Update Transcript** button (

) on the toolbar above a transcript in the right pane. The Update Transcript–Transcript File dialog box is displayed.
2. Click **Browse** to display the Browse for Transcript Files dialog box.
3. Select the PTF file and click **Open**. The Update Transcript–Transcript File dialog box is displayed.
4. The *Replace existing text with new text* check box is automatically selected. If there are no changes to the text and you want to only merge annotations, clear the check box.
5. The *Import Annotations* check box is automatically selected. If you want to only replace text and not merge annotations, clear the check box.
6. Under *Import Annotations*, **Add to existing annotations** is automatically selected. This is the correct selection for merging annotations. Select **Replace existing Annotations** if you want to replace one set of annotations with another set.
7. Click **Next**. A message warning that the transcript has not been signed electronically may be displayed. Click **Continue**. The Update Transcript–Transcript Properties dialog box is displayed.
8. Click **Finish**. The Update Transcript–Update Completed dialog box is displayed.
9. Click **Close**.

Updating with a LEF File

LEF files may contain the transcript with exhibit files and links to exhibit references in the transcript, the transcript with exhibit files and links to exhibit references in the transcript and synchronized video, or the transcript with synchronized video but no exhibits or exhibit links.

1. Click the **Update Transcript** button (

) on the toolbar above a transcript in the right pane. The Update Transcript–Transcript File dialog box is displayed.
2. Click **Browse** to display the Browse for Transcript Files dialog box.
3. Select the LEF file and click **Open**. The Update Transcript–Transcript File dialog box is redisplayed.
4. The *Replace existing text with new text* check box is automatically selected. If there are no changes to the transcript text, clear the check box.
5. The *Import exhibits* check box is automatically selected. If you do not want to import exhibits, clear the check box.
6. The *Import Annotations* check box is automatically selected. If you do not want to import annotations, clear the check box.
7. Under *Import Annotations*, **Add to existing Annotations** is automatically selected. This is the correct selection for merging the annotations. Select **Replace existing Annotations** if you want to replace one set of annotations with another set.

8. Click **Next**. A message warning that the transcript has not been signed electronically may be displayed. Click **Continue**. The Update Transcript–Transcript Properties dialog box is displayed.
9. Click **Finish**. The Update Transcript–Update Completed dialog box is displayed.
10. Click **Close**.

5 Working with Issues

An issue is a type of annotation that relates to a particular subject. (For more information on annotations, see "Working with Annotations" on page 24.) Categorizing annotations in a case by issue makes it easy to retrieve all testimony on a specific subject when you need it. Issues are created for each case and are the same for all users of that case. When creating new issues, it is important to not duplicate previous issues.

Although the issues in a case are the same for all users, each user can choose the issues to display on the Main Menu toolbar. The Main Menu toolbar enables you to access issues quickly when creating annotations. You can display up to 10 issues on the Main Menu toolbar.

Creating Issues

To create an issue, complete these steps:

1. Click the **Manage Issues** button ( ) on the Main Menu toolbar. The Manage Issues dialog box is displayed (Figure 5-1).
2. Click **New** to display the New Issue dialog box.
3. Type the name of the issue, e.g., **Work history**, in the *Issue* text box.
4. Click the **Color** arrow to select a color for the issue, if desired.
5. Click **Repeat** if you are creating multiple issues.
6. When you finish creating issues, click **OK** in the New Issue dialog box. The issues are listed under *All Issues* in the Manage Issues dialog box.

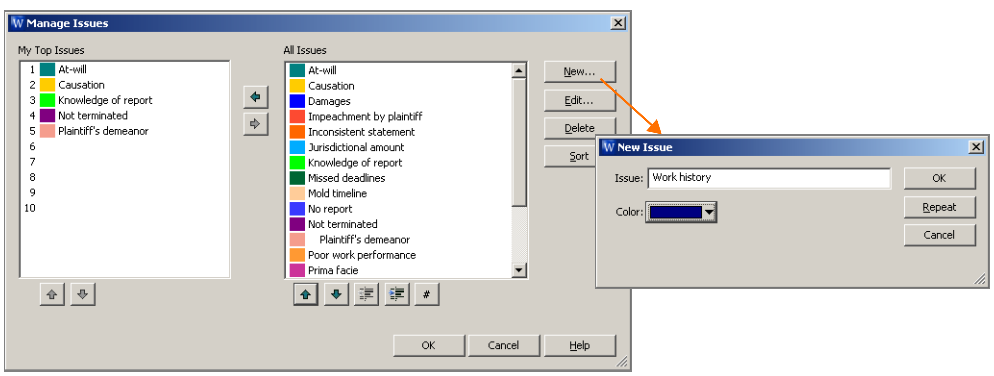


Figure 5-1. Manage Issues dialog box

CREATING SUB-ISSUES

You can create sub-issues, which are a subset of existing issues.You can add up to three levels of sub-issues.

To create a sub-issue, complete these steps:

1. Click the **Manage Issues** button ( ) on the Main Menu toolbar. The Manage Issues dialog box is displayed.

2. Click the # button (), if it is not already selected, to display numbers next to the issues (Figure 5-2).

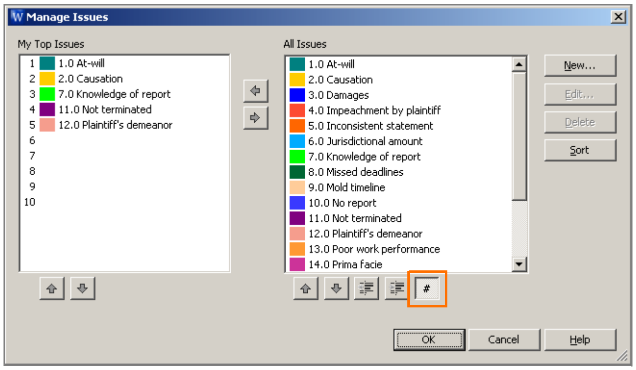


Figure 5-2. Manage Issues dialog box

3. Under *All Issues*, select the issue, e.g. **Work history**, for which you want to create a sub-issue.

   Note If you do not select an issue, the sub-issue is added to the bottom of the list.

4. Click **New** to display the New Issue dialog box.
5. Type the name of the issue, e.g., **Missed work**, in the *Issue* text box.
6. Click the **Color** arrow to select a color for the issue, if desired.
7. Click **Repeat** if you are creating multiple sub-issues.
8. When you finish creating sub-issues, click **OK** in the New Issue dialog box. The sub-issues are listed under the issue you selected.
9. Select the sub-issue, if necessary, then click the **Increase Indent** button (). The sub-issue is indented under the issue and the sub-issue number becomes sequential to the issue number.

To remove the sub-issue from under the issue, click the **Decrease Indent** button ().

Prioritizing Issues

To prioritize an issue or sub-issue and add it to the Main Menu toolbar, complete these steps:

1. Click the **Manage Issues** button on the Main Menu toolbar. The Manage Issues dialog box is displayed.
2. Select an issue or sub-issue under *All Issues*, e.g., **Work history**.
3. Click the left arrow to move the issue or sub-issue under *My Top Issues*.
4. Repeat steps 2 and 3 for each issue or sub-issue you want to prioritize and add to the Main Menu toolbar. You can prioritize up to 10 issues and sub-issues (Figure 5-3).
5. To reprioritize an issue or sub-issue and change its order on the Main Menu toolbar, select the issue or sub-issue under *My Top Issues* and click the up arrow or down arrow.

6. Click **OK** when you finish prioritizing the issues or sub-issues.

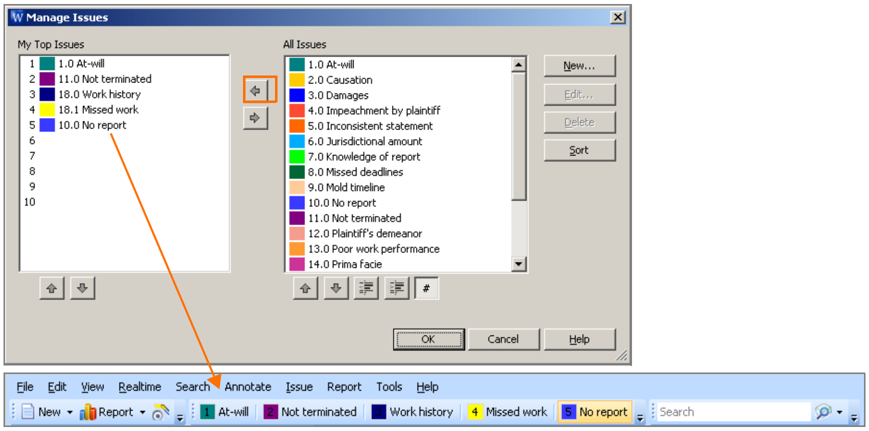


Figure 5-3. Prioritizing issues

Importing Issues

You can create a list of issues in any word-processing program that can save files as XML (Extensible Markup Language) files. To import issues and sub-issues from a file, complete these steps:

1. Click the **New** arrow on the Main Menu toolbar, then choose **Issues (from File)** from the menu. The Open dialog box is displayed.
2. Select the file containing the issues you want to import and click **Open**.
3. The message *Issues were successfully imported from the chosen file* is displayed. Click **OK**.

Exporting Issues

To export issues to a file, complete these steps:

1. Choose **Save As, Issues** from the File menu. The Save As dialog box is displayed.
2. Select a location for the file.
3. Type a name for the file in the *File name* text box.
4. Choose a file type from the *Save as type* drop-down list.
5. Click **Save**.

Creating an Issues Report

This report lists all of the issues in a transcript, grouped by issue and then arranged in page and line order. To create an Issues report, complete these steps:

1. Click the **Report** button (

) on the Main Menu toolbar, then choose **Issues** from the menu. The Issues Report Properties dialog box is displayed (Figure 5-4).

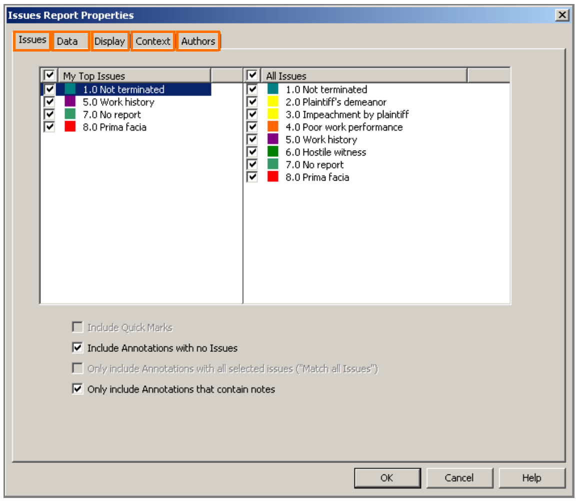


Figure 5-4. Issues Report Properties dialog box

2. All of the issues in the case are selected on the Issues tab by default. To remove an issue from the report, clear its check box.
3. Select the **Only include Annotations with all selected issues ("Match all Issues")** check box, if desired.
4. Select the **Only include Annotations that contain notes** check box, if desired.
5. Click the **Data** tab to display a list of transcripts and documents. By default, all document types and data are selected. To exclude a document type from the report, clear its check box. To exclude particular data from the report, click the document type containing the data, then clear the check boxes for the data you want to exclude.
6. Click the **Display** tab to view a list of display options. Type a title for the report in the *Title* text box, if desired. Then select or clear the appropriate check boxes.
7. Click the **Context** tab to display a list of context options. Select or clear the appropriate check boxes.
8. Click the **Authors** tab to display a list of annotation authors. If you are working in a secure case on a network, a list of all annotation authors is displayed. If you are working in the case offline, just *LocalUser* is displayed. Select or clear the appropriate check boxes.
9. Click **OK**. The Issues report, which includes the lines you marked and the surrounding questions and answers, is listed under *Report* in the left pane and the text of the report is displayed on the Report tab in the right pane.

6 Working with Annotations

An annotation is a highlighted portion of transcript text. It may be associated with an issue; a note (a comment associated with an annotation); or an attachment, e.g., a document or image.

Adding an Issue Annotation Using the Main Menu Toolbar

To add an annotation associated with an issue using the Main Menu toolbar, complete these steps:

1. Make certain the Apply Issue Mode button ( ) is displayed on the toolbar above the transcript in the right pane. To display the Apply Issue Mode button, click the **Annotate Mode** button ( ) on the toolbar above the transcript and choose **Apply Issue Mode** from the menu.

   Note The Annotate Mode button is the default button.

2. Click an issue button on the Main Menu toolbar to select the issue and assign it to the annotation you are adding.
3. Select the text you want to annotate. The text is highlighted with the color of the issue you selected (Figure 6-1). The issue will be assigned to every annotation you create until you cancel its selection on the Main Menu toolbar.

Note You can select more than one issue on the Main Menu toolbar. Annotated text will be highlighted with the color of the last issue that you select.

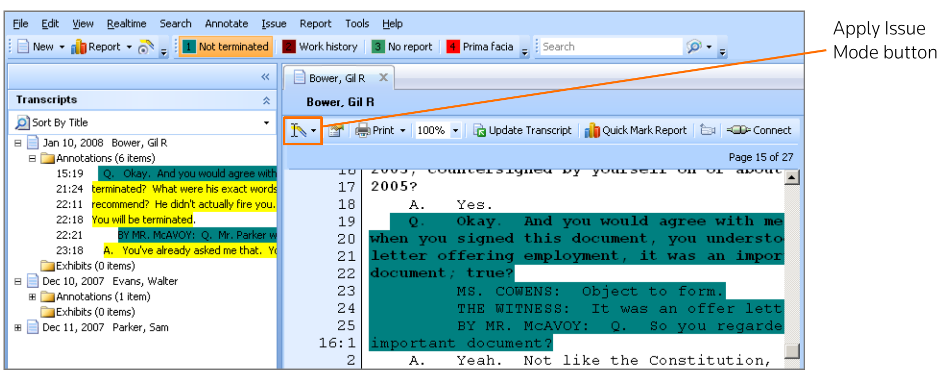


Figure 6-1. Annotated text

Adding an Annotation Using the Annotation Properties Dialog Box

You can use the Annotation Properties dialog box to add an annotation associated with a note, issue, attachment, or a combination of these. To view the Annotation Properties dialog box, make certain the Annotate

Mode button ( ) is displayed on the toolbar above the transcript in the right pane. Then select the text in transcript you want to annotate. The Annotation Properties dialog box is displayed (Figure 6-2).

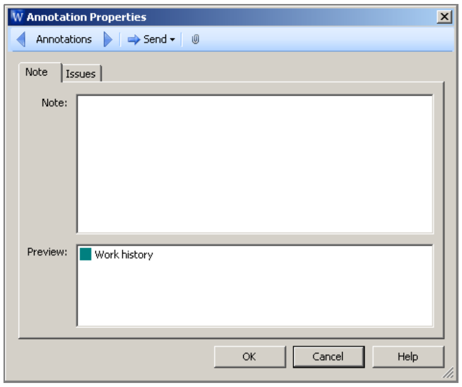


Figure 6-2. Annotation Properties dialog box

ADDING A NOTE TO AN ANNOTATION

The Note tab is the default tab in the Annotation Properties dialog box. To add a note to the annotated text, type the note in the *Note* text box and click **OK**.

ADDING AN ISSUE TO AN ANNOTATION

To associate an issue with an annotation, complete these steps:

1. Click the **Issues** tab in the Annotation Properties dialog box. A list of prioritized issues (those that appear on the Main Menu toolbar) is displayed under *My Top Issues* and a list of all issues is displayed under *All Issues*.
2. To assign one or more issues to the annotation, select the appropriate check boxes. Note that the check boxes for any issues you previously selected on the Main Menu toolbar are already selected.
3. Click **OK**. The annotated text is highlighted with the color of the issue you selected.

ADDING AN ATTACHMENT TO AN ANNOTATION

To add an attachment to an annotation, complete these steps:

1. Click the paper clip icon ( ) in the Annotation Properties dialog box. The Edit Attachment dialog box is displayed.
2. Click **Browse** to display the Open dialog box is. Select your document and click **Open**. The Edit Attachment dialog box is redisplayed.
3. Click **OK**.
4. Click **OK** again in the Annotations Properties dialog box. For transcripts, a paper clip icon is displayed next to the annotation (Figure 6-3). To view the attachment, click the paper clip icon.

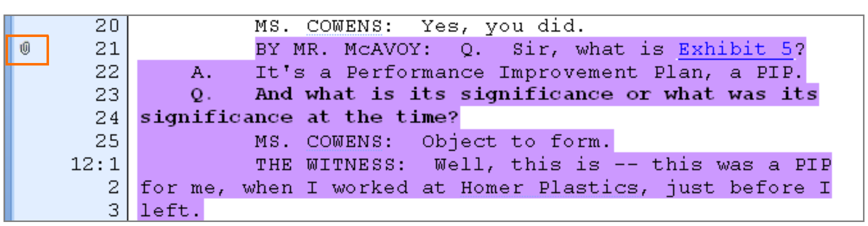


Figure 6-3. Paper clip icon in a transcript

ASSOCIATING VIDEO WITH AN ANNOTATION

You can associate video with an annotation if the transcript has been synchronized with video footage. For further information, see "Working with Video in Transcripts" on page 45.

Transferring Annotations

You can transfer an annotation to another application such as Microsoft Word, Corel WordPerfect, or TrialDirector using either of the following methods:

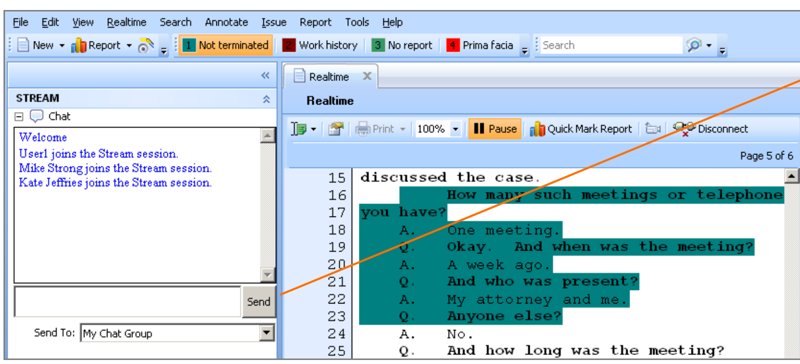
- Click **Send** in the Annotation Properties dialog box, then choose the application from the menu.
- Right-click in the annotation and choose **Send** from the menu, then choose the application from the submenu.

To transfer an annotation that is associated with a video to PowerPoint, see "Transferring Annotations to Microsoft PowerPoint" on page 46.

Sending Annotations to Instant Messages

To send an annotation to a team member during an instant messaging session, complete these steps:

1. Click **Send** in the Annotation Properties dialog box, then choose **Realtime Chat** from the menu.
2. Click **OK**. The annotation is displayed in the *Annotation* text box under *Stream* in the left pane.
3. Click **Send** to send the annotation to your chat group. Or choose an individual from the *Send To* drop-down list and click **Send**.
4. Repeat steps 1–3 for each annotation you want to send (Figure 6-4).



Click **Send** to send the annotation to your chat group.

Figure 6-4. Sending an annotation to an instant message

Editing Annotations

To change the information associated with an annotation, right-click in the annotation and choose **Edit Annotation** from the menu. The Annotation Properties dialog box is displayed. Make the appropriate changes and click **OK**.

Deleting Annotations

To delete an annotation, right-click in the annotation and choose **Delete Annotation** from the menu. The message *Permanently delete the selected Annotation?* is displayed. Click **Yes**.

Viewing an Annotation Attachment

To view an annotation attachment, right-click in the annotation and choose **Open Attachment** from the menu.

Creating an Annotations Report

You can generate a report that includes a list of all the annotations in a transcript, arranged in page and line order. It also includes the surrounding questions and answers.

To create an Annotations report for the transcript you are viewing, right-click the **Annotations** folder in the left pane and click **Report**. The report is listed under *Report* in the left pane and the text of the report is displayed on the Report tab in the right pane (Figure 6-5).

Click the **Hit** arrows in the left pane to view the next or previous annotation in the report. Click the heading next to a transcript icon in the report to go to the location in the transcript where the annotation appears.

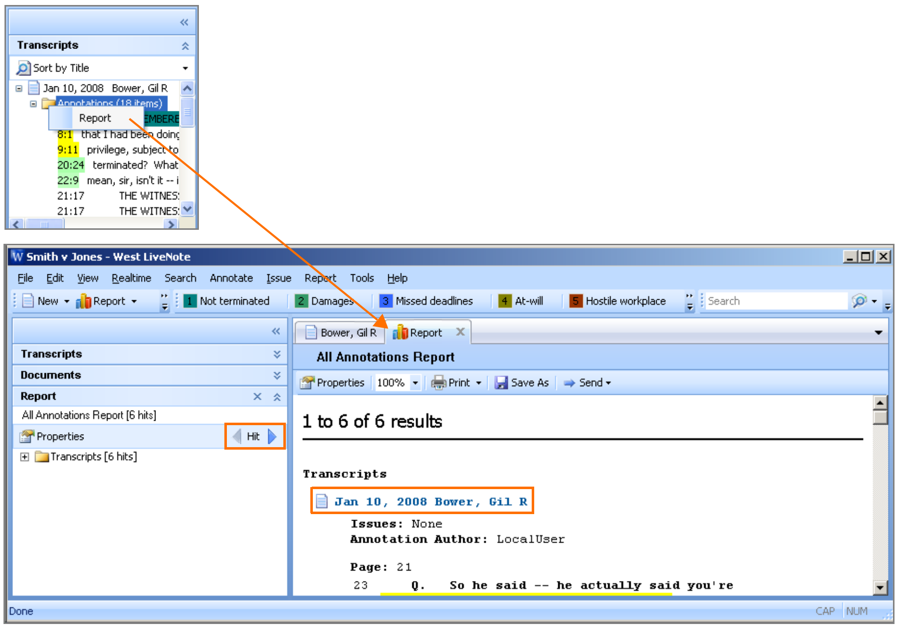


Figure 6-5. Annotations report

To create an Annotations report for one or more transcripts, complete these steps:

1. Click the **Report** button () on the Main Menu toolbar, then choose **All Annotations** from the menu. The All Annotations Report Properties dialog box is displayed (Figure 6-6).

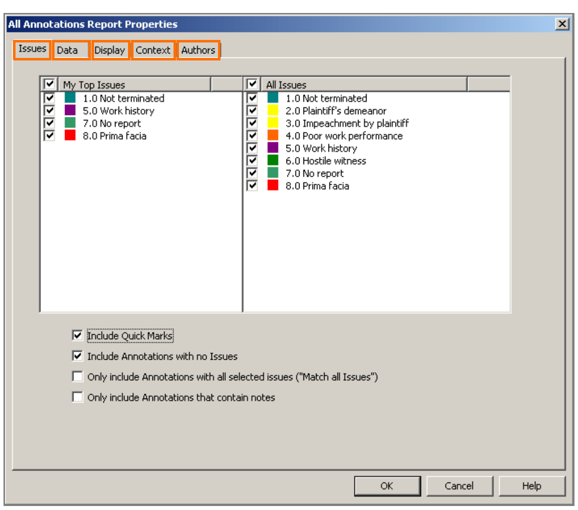


Figure 6-6. All Annotations Report Properties dialog box

2. All of the issues in the case are selected on the Issues tab by default. To exclude an issue from the report, clear its check box.
3. Clear the **Include Quick Marks** check box, if desired.
4. Clear the **Include Annotations with no Issues** check box, if desired.
5. Select the **Only include Annotations with all selected issues ("Match all Issues")** check box, if desired.
6. Select the **Only include Annotations that contain notes** check box, if desired.
7. Click the **Data** tab to display a list of transcripts and documents. By default, all document types and data are selected. To exclude a document type from the report, clear its check box. To exclude particular data from the report, click the document type containing the data, then clear the check boxes for the data you want to exclude.
8. Click the **Display** tab to view a list of display options. Type a title for the report in the *Title* text box, if desired. Then select or clear the appropriate check boxes.
9. Click the **Context** tab to display a list of context options. Select or clear the appropriate check boxes.
10. Click the **Authors** tab to display a list of annotation authors. If you are working in a secure case on a network, a list of all annotation authors is displayed. If you are working in the case offline, just *LocalUser* is displayed. Select or clear the appropriate check boxes.
11. Click **OK**. The Annotations report, which includes the lines you marked and the surrounding questions and answers, is listed under *Report* in the left pane and the text of the report is displayed on the Report tab in the right pane.

CREATING A VERBATIM DIGEST REPORT

This is an Annotations report that includes only highlighted transcript text. To create a Verbatim Digest report, first create an Annotations report. Then click the **Properties** button (Properties) on the toolbar above the report in the right pane to display the All Annotations Report Properties dialog box. Click the **Display** tab and clear all check boxes under *Annotations*. Then, click the **Context** tab. Under *Transcripts*, select the **Show annotated text** check box and clear the **Additional context** check box, then click **OK**.

CREATING A NOTES REPORT

This report lists all of the annotations in a transcript that have a note, arranged in page and line order. To create a Notes report, first create an Annotations report. Then click the **Properties** button (Properties) on the toolbar above the report in the right pane to display the All Annotations Report Properties dialog box. On the Issues tab, select the **Only include Annotations that contain notes** check box and click **OK**.

CREATING AN ATTACHMENTS REPORT

This report lists all of the annotations in a transcript that have an attachment, arranged in page and line order. To create an Attachments report, first create an Annotations report. Then click the **Properties** button (Properties) on the toolbar above the report in the right pane to display the All Annotations Report Properties dialog box. On the Issues tab, clear the **Include Quick Marks** check box. Then click the **Display** tab. Clear all check boxes under *Annotations* except the *Attachments* check box, then click **OK**.

7 Working with Full Text Search

The Full Text Search feature enables you to search one or more transcripts in the open case for specific terms.

Creating a Full Text Search

You can enter a search that consists of key terms from your issue and connectors specifying the relationship between those terms. To create a search, complete these steps:

1. From the Search menu, choose **Full Text Search**. The Full Text Search Properties dialog box is displayed (Figure 7-1).

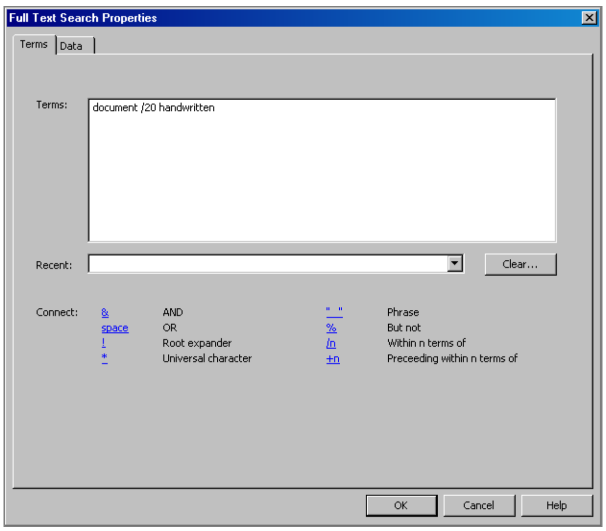


Figure 7-1. Full Text Search Properties dialog box

2. Formulate your search by choosing search terms significant to your issue and deciding which connectors to place between your terms. To retrieve variations of terms, use the root expander (!) and the universal character (*). To retrieve a phrase, place quotations marks (" ") around the phrase.

   For more information on creating a search, see "Formatting a Full Text Search" on page 30.

3. Type your search, e.g., **document /20 handwritten**, in the *Terms* text box. Or choose a search from the *Recent* drop-down list.

4. Click the **Data** tab to display a list of transcripts, documents, and annotation notes. By default, all document types and data are selected. To exclude a document type from the search, clear its check box. To exclude particular data from your search, click the document type containing the data, then clear the check boxes for the data you want to exclude.

5. Click **OK**. Information about the search is displayed under *Search Results* in the left pane (Figure 7-2).

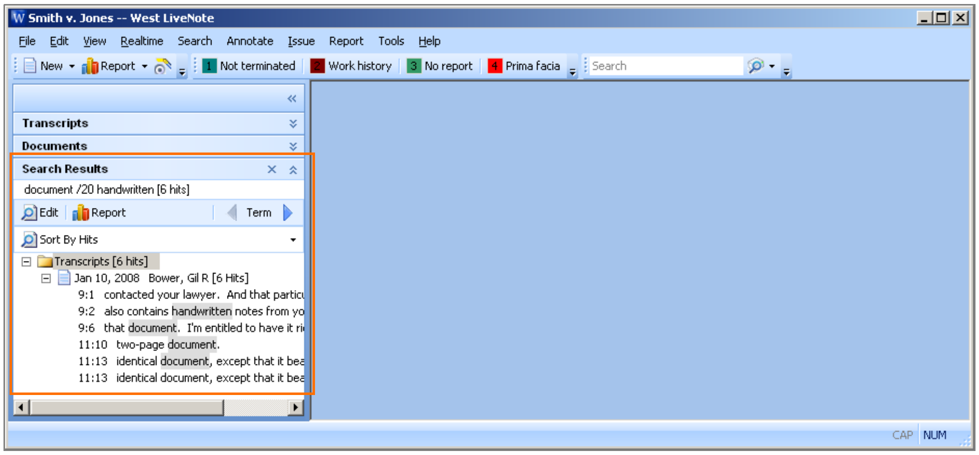


Figure 7-2. Full Text Search result

To work with your search result, you can

- click a line in the result list to display that place in the result
- click **Edit** (Edit) to edit your search
- click **Report** (Report) to create a report for your search result
- click the **Term** (Term) arrows to view the next or previous search term in your result
- click the **Sort by** arrow to sort your search result (Figure 7-3)

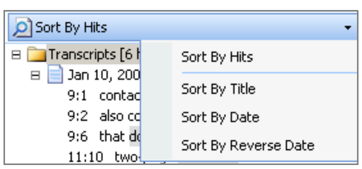


Figure 7-3. Sort by list

Formatting a Full Text Search

USING THE ROOT EXPANDER

Use the root expander (!) to retrieve words with variant endings. The root expander must always be placed at the end of a term. For example,

Type	To retrieve
contribut!	*contribute* *contributed* *contributor* *contributing* *contribution* *contributory*

Plurals and possessive forms are automatically retrieved without a root expander.

USING THE UNIVERSAL CHARACTER

Use the universal character (*) to represent one variable character. You can place the universal character anywhere in a term except at the beginning. For example,

Type	To retrieve
gr*w	*grew* *grow*

Note When you place one or more universal characters at the end of a term, you specify the maximum length of that term.

USING CONNECTORS

Use connectors to specify the relationships that should exist between search terms in your retrieved transcripts.

Type	To search for transcripts that contain
& (AND)	both terms
a space (OR)	either term or both terms
/n	terms within *n* terms of each other (where *n* is a number)
+n	the first term preceding the second by *n* terms (where *n* is a number)
" "	terms appearing in the same order as in the quotation marks

Type	To exclude transcripts that contain
% (BUT NOT)	the terms following the percent symbol

Creating a Search Report

This report lists the result retrieved when you run a search using the Full Text Search feature. To create a Search report, click the **Report** button (

) on the Main Menu toolbar, then choose **Full Text Search** from the menu. See "Working with Full Text Search" on page 29 for information on running searches.

8 Working with Auto Tags

Use Auto Tags to automatically highlight words or phrases as they appear in a transcript.

Creating Auto Tags

To create an Auto Tag, complete these steps:

1. Choose **Auto Tags** from the Annotate menu. The Auto Tags dialog box is displayed (Figure 8-1).

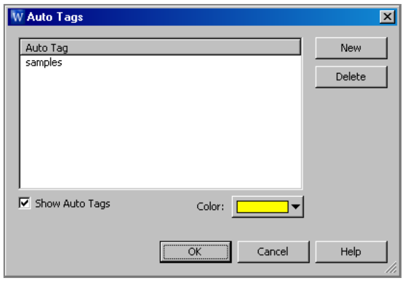


Figure 8-1. Auto Tags dialog box

2. Click **New**. Then type the word or phrase you want to add to the Auto Tags list.
3. Select the **Show Auto Tags** check box to highlight Auto Tags in the transcript.
4. Click the **Color** arrow to select a color, if desired.
5. Click **OK** to save your changes. Your Auto Tags will be highlighted automatically throughout the transcript(Figure 8-2).

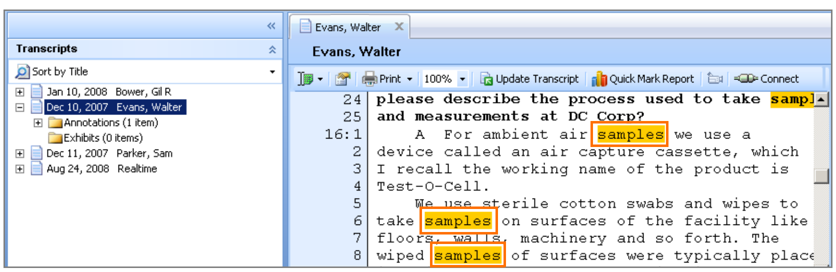


Figure 8-2. Auto Tags

Managing Auto Tags

SHOWING AND HIDING AUTO TAGS

If you choose not to show Auto Tags when you create them, you can show them by choosing **Auto Tags** from the Annotate menu. The Auto Tags dialog box is displayed. Select the **Show Auto Tags** check box and click **OK**. To hide Auto Tags, clear the **Show Auto Tags** check box.

DELETING AUTO TAGS

To delete an Auto Tag, complete these steps:

1. From the Annotate menu, choose **Auto Tags** to display the Auto Tags dialog box.
2. Select the Auto Tag you want to remove and click **Delete**.
3. Repeat step 2 for each Auto Tag you want to delete.

4. Click **OK** to save your changes.

Creating an Auto Tag Report

This report lists all occurrences of the words and phrases in a transcript for which Auto Tags were created, arranged in page and line order. To create an Auto Tag report, complete these steps:

1. Click the **Report** button () on the Main Menu toolbar, then choose **Auto Tags** from the menu. The Auto Tag Report Properties dialog box is displayed (Figure 8-3).

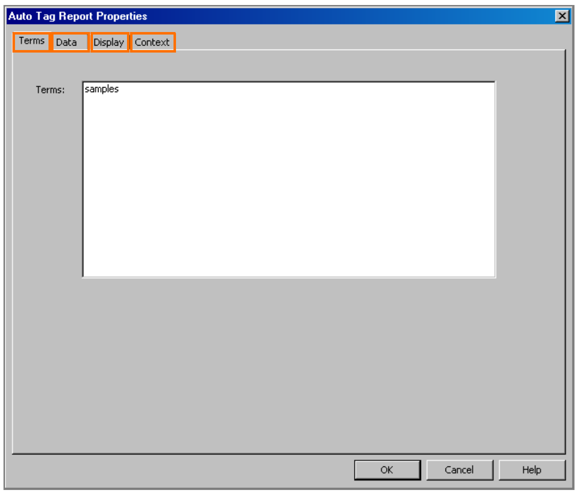


Figure 8-3. Auto Tag Report Properties dialog box

2. Click the **Data** tab to display a list of transcripts and documents. By default, all document types and data are selected. To exclude a document type from the report, clear its check box. To exclude particular data from the report, click the document type containing the data, then clear the check boxes for the data you want to exclude.
3. Click the **Display** tab to view a list of display options. Type a title for the report in the *Title* text box, if desired. Then select or clear the appropriate check boxes.
4. Click the **Context** tab to display a list of context options. Select or clear the appropriate check boxes.
5. Click **OK**. The Auto Tag report, which includes the lines with the Auto Tags and the surrounding questions and answers, is listed under *Report* in the left pane and the text of the report is displayed on the Report tab in the right pane.

9 Working with Data Groups

You can organize transcripts, documents, and annotation notes into groups. For example, you can create groups based on the different types of witnesses in a case, such as character witnesses and expert witnesses. When you assign data to a group, the data is displayed under the group folder in the left pane (Figure 9-1). You can also select a group when you are preparing reports or creating searches to ensure all the transcripts, documents, and annotation notes you need are included.

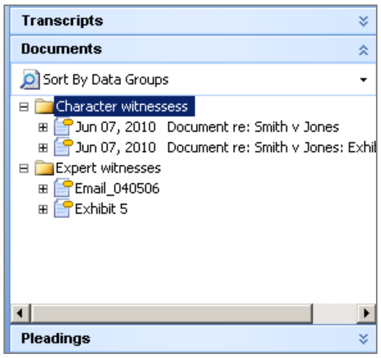


Figure 9-1. Documents organized into data groups

Creating a Data Group

To create a data group, complete these steps:

1. Click the **New** arrow on the Main Menu toolbar, then choose **Data Group** from the menu. The Data Group Properties dialog box is displayed (Figure 9-2).

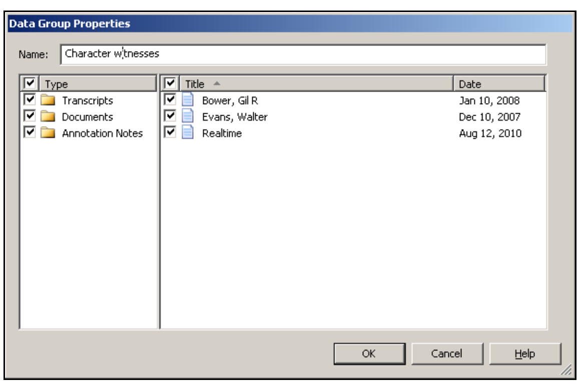


Figure 9-2. Data Group Properties dialog box

2. Type the name of the group, e.g., **Character witnesses**, in the *Name* text box.
3. By default, all transcripts, documents, and annotation notes are selected. To exclude a document type from the group, clear its check box. To exclude particular data from the group, click the document type containing the data, then clear the check boxes for the data you want to exclude.
4. Click **OK**.

Editing Data Groups

To add document types and data to a group or remove them from a group, complete these steps:

1. From the Tools menu, choose **Manage Data Groups**. The Data Groups dialog box is displayed.
2. Select the group you want to edit and click **Edit**. The Data Group Properties dialog box is displayed.
3. Select or clear the appropriate check boxes and click **OK**.
4. Click **OK** again in the Data Groups dialog box.

Using Data Groups in Reports

To create a report using data groups, complete these steps:

1. Click the **Report** button () on the Main Menu toolbar, then choose the type of report you want to create, e.g., **Issues**.
2. In the dialog box that is displayed, click the **Data** tab, then click **Groups**. The Data Groups dialog box is displayed.
3. Select the group or groups you want to include in the report and click **OK**.
4. Click **OK** again to create the report.

Using Data Groups in Full Text Searches

You can run full text searches using data groups. To conduct a search using data groups, complete these steps:

1. From the Search menu, choose **Full Text Search**. The Full Text Search Properties dialog box is displayed.
2. Type a search in the *Terms* text box, or choose a search from the *Recent* drop-down list.
3. Click the **Data** tab, then click **Groups**. The Data Groups dialog box is displayed.
4. Select the group or groups you want to include in the search and click **OK**. The Full Text Search Properties dialog box is redisplayed.
5. Click **OK** to run the search.

See "Working with Full Text Search" on page 29 for more information on using the Full Text Search feature.

Sorting by Data Groups

Use the Sort by Data Groups feature to view transcripts, documents, pleadings, and research documents sorted by data groups. For example, to view documents listed in the data groups, click **Documents** in the left pane, then click the arrow next to *Sort By Title* and choose **Sort By Data Groups** from the menu. The documents are listed in the data group folders to which they were assigned.

10 Transferring Transcript and Document Text

You can copy the text of a transcript or document and paste it into other applications. You will need to make certain that the appropriate button used for copying text is displayed. To display the button, click the **Annotate Mode** button ( ) on the toolbar above the transcript or document in the right pane, then choose the appropriate button from the menu (Figure 10-1), as discussed below. The menu choices will vary depending on if you are viewing a transcript or document.

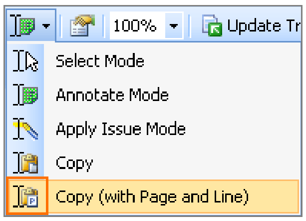


Figure 10-1. Copy buttons

Transferring Text of a Transcript

When viewing a transcript, you can transfer the transcript citation with the text, which includes the following details:

- name of the transcript
- page number (or numbers if copied text spans more than one page)
- line numbers
- date of the transcript

To transfer transcript text with the transcript citation, complete these steps:

1. Make certain the **Copy (with Page and Line)** button ( ) is displayed.
2. Select the text you want to copy.
3. Open an outline in West Case Notebook or open another application and paste the text you have copied. For example, to paste the text into Microsoft Word, press **Ctrl+V** or choose **Paste** from the Edit menu in Word (Figure 10-2).

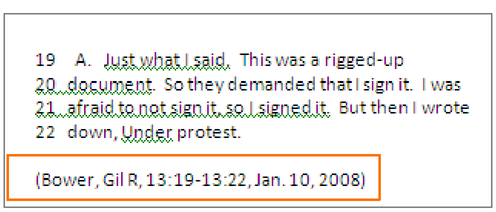


Figure 10-2. Transcript text with citation in Word

Transferring Text of a Document

To transfer the text of a document that is a word-processing document, complete these steps:

1. Make certain the **Copy** button ( ) is displayed.
2. Select the text you want to copy.

3. Open another application and paste the text you have copied. For example, to paste the text into Microsoft Word, press **Ctrl+V** or choose **Paste** from the Edit menu in Word.

If you are viewing a document that is an image file or PDF file, you can transfer a portion of the document. To transfer a portion of a document, complete the following steps:

1. Make certain the **Select Mode** button ( ) is displayed.
2. Select the part of the document you want to copy.
3. Choose **Copy** from the Edit menu.
4. Open another application and paste the text you have copied. For example, to paste the text into Microsoft Word, press **Ctrl+V** or choose **Paste** from the Edit menu in Word.

11 Using the Word Index

The Word Index contains an index of words and numbers in a transcript along with their corresponding page and line numbers (Figure 11-1). When you are connected to Realtime, the Word Index is updated every 15 seconds. Use the Word Index to search for a term in the transcript. Type the term in the text box to the right of the transcript to display the pages and lines where the term is found in the transcript.

To see the term in context, point to the page and line reference. The question and answer in which the term appears is displayed.

Note If you do not see the question and answer in which the term appears, you must change the Word Index display options. For further information, see "Selecting Word Index Display Options" below.

To display the term in the transcript, click the page and line reference.

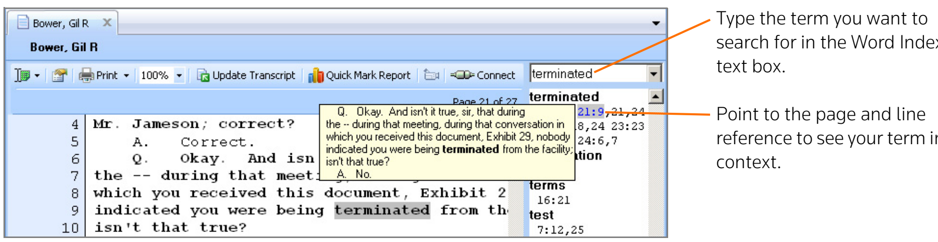


Figure 11-1. Word Index

Selecting Word Index Display Options

To select Word Index display options, choose **Display Options** from the View menu to display the Display Options dialog box (Figure 11-2). Click the **Word Index** tab. You can specify

- whether you want to see your term in context when you point to the page and line reference in the Word Index
- how much transcript text you want displayed when viewing a term in context in the Word Index. If you select **QA Pair**, the entire question and answer in which the term appears is displayed. In the alternative, you can designate the number of lines to be displayed above and below the term
- the types of documents in which to display the Word Index

Click **OK** to save the Word Index display options.

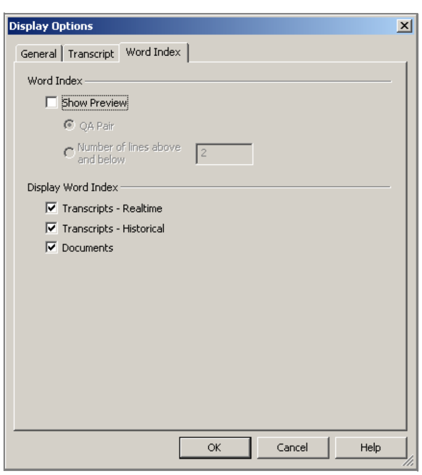


Figure 11-2. Display Options dialog box

12 Connecting to Realtime

Connecting with a Serial Connection

If you want to connect to Realtime using serial cables, your computer must have a serial port. If you have only a USB port available, you will need to provide a USB to serial adapter. (For information about serial adapters, download a free copy of *Connecting to Realtime: West Case Notebook/West LiveNote* at **west.thomson.com/support/user-guide/livenote-case-notebook.aspx**.) If a USB to serial adapter is not available, you can connect to Realtime over the Internet via LiveNote Stream. Contact the court reporter to schedule the session.

To connect to Realtime using serial cables, complete these steps:

1. Click the **New** arrow on the Main Menu toolbar, then choose **Realtime Transcript** from the menu. The Connect to Realtime dialog box is displayed (Figure 12-1).

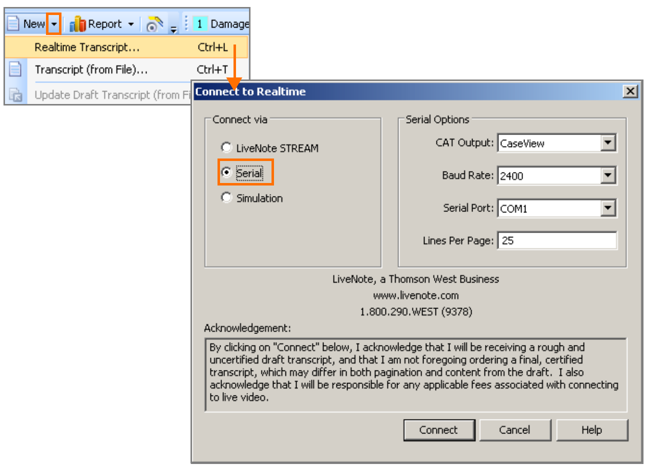


Figure 12-1. Connect to Realtime dialog box

2. Select **Serial**. The court reporter will give you the necessary settings for connecting to the reporter's CAT (computer–aided transcription) system. You will need to know the required serial port setting.
3. Click **Connect** to connect to Realtime.

Using LiveNote Stream

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

The court reporter must schedule the session *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.

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 WEST LIVENOTE

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

1. Click the **New** arrow on the Main Menu toolbar, then choose **Realtime Transcript** from the menu. The Connect to Realtime dialog box is displayed (Figure 12-2).

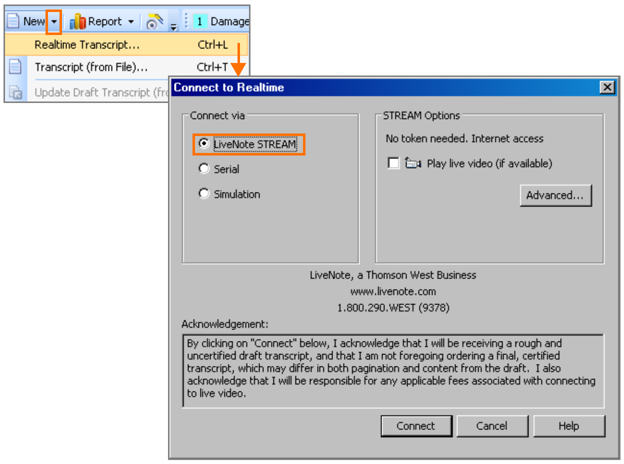


Figure 12-2. Connect to Realtime dialog box

2. Select **LiveNote Stream**.
3. Select the check box next to *Play live video (if available)*.
4. Click **Connect** to display the LiveNote Stream Login dialog box.
5. Type the username and password sent to you by LiveNote Central and click **OK** to display the Connect to LiveNote Stream dialog box.
6. Select the session you want to attend and click **OK**.

ACCESSING LIVENOTE STREAM THROUGH INTERNET EXPLORER

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

To access LiveNote Stream through Internet Explorer, complete these steps:

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

3. Select the session you want to attend and click **Go**. The Realtime transcript text and video are displayed (Figure 12-3).

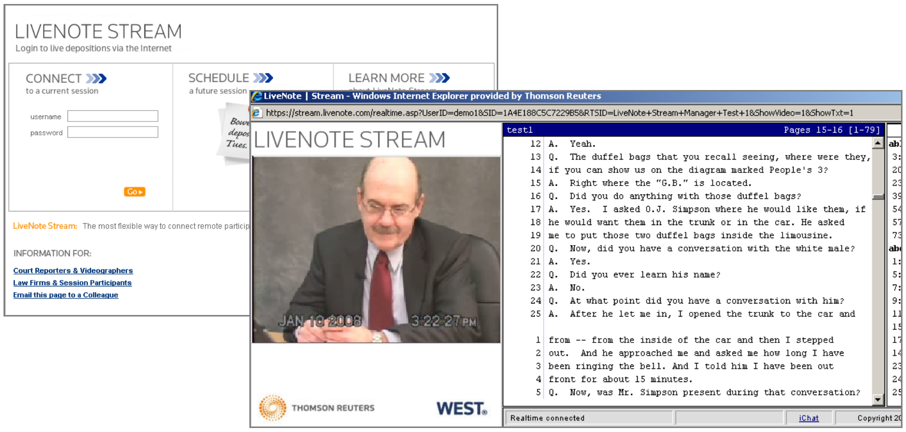


Figure 12-3. LiveNote Stream

ACCESS TO FEATURES IN LIVENOTE STREAM

When you view access LiveNote Stream 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 access LiveNote Stream using West LiveNote software, you have access to all the tools in West LiveNote. Below is a chart showing the features available with LiveNote Stream.

West LiveNote Features	LiveNote Stream Through Internet Explorer	LiveNote Stream Through West LiveNote
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		■

13 Working with a Transcript in Realtime

West LiveNote provides you with tools that are easy to use even when you are working with a transcript in Realtime. You can stop and start the scrolling text, annotate the text, and do quick word searches at the same time that you are listening to what the deponent or witness is saying. You can also annotate and search existing transcripts.

Starting and Stopping Text

To stop the scrolling transcript (Figure 13-1),

- click **Pause** on the toolbar above the transcript
- press the **Esc** key

To browse the text of the transcript,

- use the scroll bar on the right
- press the **Page Up** and **Page Down** keys
- press the arrow keys
- press **Ctrl+Home** to go to the top of the text
- press **Ctrl+End** to go to the end of the text

To restart the scrolling transcript,

- click **Pause**
- press the **Esc** key

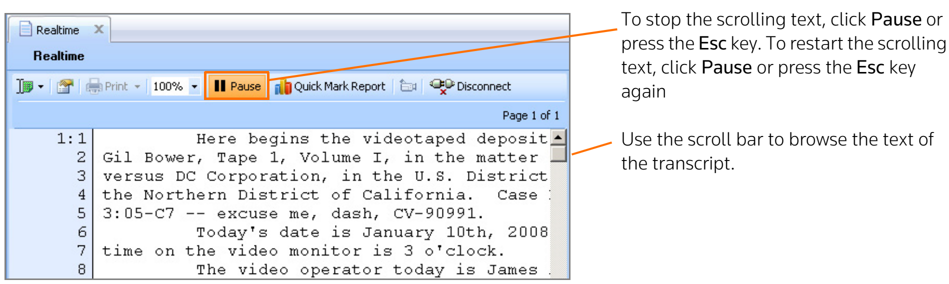


Figure 13-1. Starting and stopping transcript text

Using Quick Marks

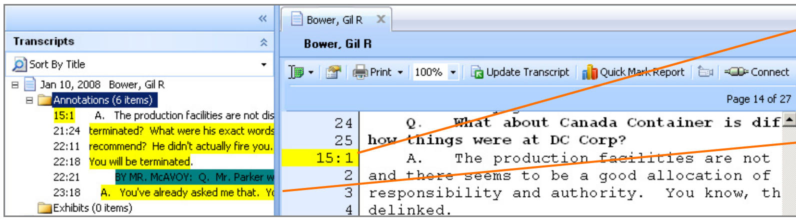
Quick Marks are marks at the line number in the margin of a transcript. They are the simplest form of annotation in West LiveNote and are displayed as a solid bar in the default Quick Mark color. You can use them as place markers in the text for which you can run searches and generate reports.

To insert a Quick Mark (Figure 13-2)

- press the spacebar on your keyboard
- click a line number

A complete list of all Quick Marks in a transcript is located in the Annotations folder under the transcript in the left pane. Click the plus symbol (**+**) next to the transcript to view the Annotations folder. Double-click a Quick Mark reference in the folder to jump to the Quick Mark in the transcript.

To delete a Quick Mark, click it in the margin of the transcript.



Press the **spacebar** or click a line number to place a Quick Mark in the margin of the transcript.

Double-click a Quick Mark reference to jump to its location in the transcript.

Figure 13-2. Quick Mark

Quick Marks Report

This report lists all Quick Marks and Issue Marks in a transcript, arranged in page and line order.

To create a Quick Marks report for the transcript you are viewing, click the **Quick Mark Report** button (Quick Mark Report) on the toolbar above the transcript in the right pane. The report is displayed on the Report tab in the right pane.

To create a Quick Marks report for one or more transcripts, complete these steps:

1. Click the **Report** button (Report) on the Main Menu toolbar, then choose **Quick Marks**. The Quick Mark Report Options dialog box is displayed (Figure 13-3).

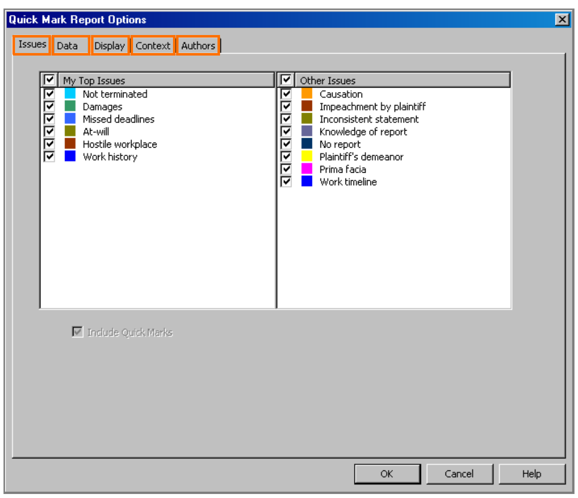


Figure 13-3. Quick Mark Report Options dialog box

2. All of the issues in the case are selected on the *Issues* tab by default. To exclude an issue from the report, clear its check box.
3. Click the **Data** tab to display a list of transcripts. By default, all transcripts are selected. To exclude a transcript from the report, clear its check box.
4. Click the **Display** tab to view a list of display options. Type a title for the report in the *Title* text box, if desired. Then select or clear the appropriate check boxes.
5. Click the **Context** tab to display a list of context options. Select or clear the appropriate check boxes.
6. Click the **Authors** tab to display a list of annotation authors. If you are working in a secure case on a network, a list of all annotation authors is displayed. If you are working in the case offline, just *LocalUser* is displayed. Select or clear the appropriate check boxes.

7. Click **OK**. The Quick Marks report, which includes the lines you marked and the surrounding questions and answers, is displayed on the Report tab in the right pane.

Using Issue Marks

An Issue Mark is a mark at the page and line number in the margin of a transcript that corresponds to a particular issue on the Main Menu toolbar. The Issue Mark color is the same as the color of the issue. To insert an Issue Mark, click an issue button on the Main Menu toolbar, then click a line number (Figure 13-4).

A complete list of all Issue Marks is located in the Annotations folder in the left pane. Click the plus symbol (**+**) next to the transcript to view the Annotations folder. Double-click an Issue Mark reference in the folder to jump to the Issue Mark in the transcript.

To delete an Issue Mark, click it in the margin of the transcript.

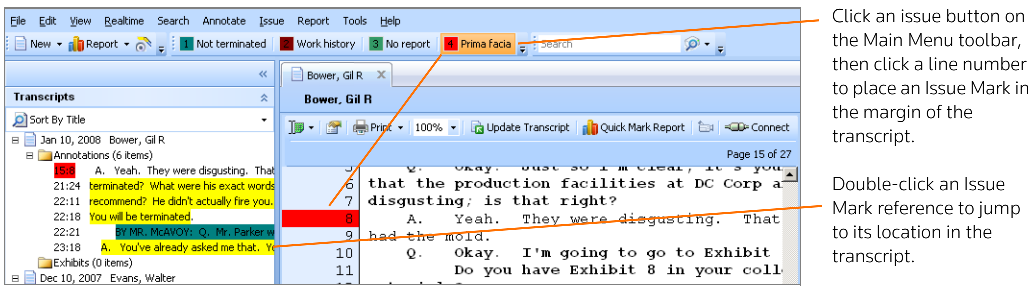


Figure 13-4. Issue Mark

14 Working with Video in Transcripts

Playing Video Segments

If the transcript you are viewing has a video associated with it, you can view the portion of the video that is synchronized with the transcript. To view the video, right-click anywhere in the transcript, then click Play Video. To play a video segment that is associated with an annotation, right-click in the annotation and choose Play Video Segment from the menu.

Creating Annotation Video Segments

If a transcript has been synchronized with video, you can convert the transcript text to a video segment and save it. You can create a single video segment from a single annotation or create multiple video segments from an Annotations report.

CREATING A VIDEO SEGMENT FROM A SINGLE ANNOTATION

To create a single video segment from an annotation, complete these steps:

1. Double-click an annotation in the left pane. The highlighted text of the annotation is displayed in the right pane.
2. Right-click in the annotation.
3. From the menu that is displayed, choose Send. Then choose Video File from the submenu. The Save As dialog box is displayed.
4. Select a location for the file.
5. Type a different file name in the *File name* text box, if desired.
6. Click Save. The message *Would you like to view the new video clip now?* is displayed.
7. Click Yes to view the video segment.

CREATING MULTIPLE VIDEO SEGMENTS FROM AN ANNOTATIONS REPORT

To create multiple video segments from an Annotations report, complete these steps:

1. In the left pane, right-click the Annotations folder, then click Report. The Annotations report is displayed on the Report tab in the right pane.
2. Click Send at the top of the report, then choose Video File from the menu. The Save As dialog box is displayed.
3. Select a location for the file.
4. Type a different file name in the *File name* text box, if desired.
5. Click Save. The message *Video files saved successfully. Would you like to open the containing folder now?* is displayed.
6. Click Yes to open the folder in which the video segments are stored. The page and line ranges are added to the video segments.

EDITING VIDEO SEGMENTS

To edit the start and end time for a video segment that is associated with an annotation, right-click in the annotation and choose **Edit Annotation** from the menu. The Annotations Properties dialog box is displayed. Click the Video tab and make your changes in the appropriate text boxes, then click **OK**. (Figure 14-1).

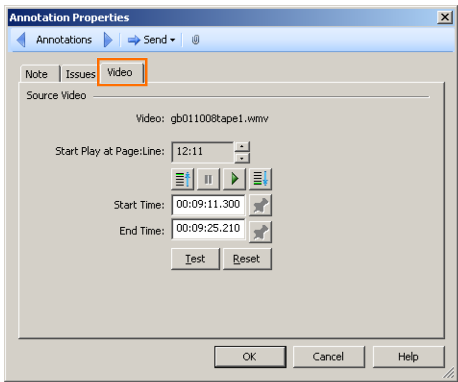


Figure 14-1. Annotations Properties–Video tab

Transferring Annotations to Microsoft PowerPoint

You can transfer annotations and video segments to Microsoft PowerPoint and have them embedded in PowerPoint slides. Each annotation creates a separate slide. You can create a slide from a single annotation or multiple slides from an Annotations report.

Note It is recommended that you use short annotations for each PowerPoint slide. If you need a longer excerpt, transfer multiple annotations from a report to create a single PowerPoint presentation with a slide for each annotation.

Also, when you transfer annotations to PowerPoint from transcripts with associated videos, you have the option of saving both the PowerPoint file (PPT) and the video clip (WMV). If you want to share the PowerPoint presentation with someone else, you must include the associated WMV file for the embedded video to play.

CREATING A POWERPOINT PRESENTATION FROM A SINGLE ANNOTATION

To create a PowerPoint presentation from an annotation, complete these steps:

1. Double-click an annotation in the left pane. The highlighted text of the annotation is displayed in the right pane.
2. Right-click in the annotation and choose **Send** from the menu and **PowerPoint** from the submenu. The Save As dialog box is displayed.
3. Select a location for the file.
4. Type a different file name in the *File name* text box, if desired.
5. Click **Save**. The message *Would you like to open the presentation now?* is displayed.
6. Click **Yes** to view the PowerPoint presentation. To create another PowerPoint presentation, close PowerPoint.

CREATING A POWERPOINT PRESENTATION FROM AN ANNOTATIONS REPORT

To create a PowerPoint presentation from an Annotations report, complete these steps:

1. In the left pane, right-click the **Annotations** folder, then click **Report**. The Annotations report is displayed on the Report tab in the right pane.
2. Click **Send** at the top of the report, then choose **PowerPoint** from the menu. The Save As dialog box is displayed.

3. Select a location for the file.
4. Type a different name for the file in the *File name* text box, if desired.
5. Click Save. The message *Would you like to open the presentation now?* is displayed.
6. Click Yes to view the PowerPoint presentation. To create another PowerPoint presentation, close PowerPoint.

SAVING POWERPOINT FILES WITH THE SAME NAME

If you save a PowerPoint file with a name that already exists, the Existing PowerPoint File dialog box is displayed. Select Append slides to existing presentation to add slides to the existing presentation.

Appendix

Using Issues to Create an Errata Report

The deponent has the option of reviewing the transcript after the deposition. If the deponent finds errors in the transcript, you can easily mark those places in the transcript and create an Errata report. To create an Errata report, complete these steps:

1. Create an issue named **Errata** (see "Working with Issues" on page 20) and prioritize it to add it to the Main Menu toolbar.
2. Make certain the **Annotate Mode** button ( ) is displayed on the toolbar above the transcript in the right pane.
3. Click the **Errata** button on the Main Menu toolbar to select it.
4. Select the text in the transcript that the deponent reports is in error. The Annotation Properties dialog box is displayed.
5. Type any information regarding the error in the *Note* text box, e.g., **Witness says name should be Joan, not John.** Click **OK**.
6. Right-click the **Annotations** folder under the transcript in the left pane and click **Report**. The report is listed under *Report* in the left pane and the text of the report is displayed on the Report tab in the right pane.
7. Click the **Properties** button (Properties) on the toolbar above the report in the right pane to display the All Annotations Report Properties dialog box.
8. On the Issues tab, clear all check boxes except the **Errata** check box.
9. Select the **Only include Annotations with all selected issues ("Match all Issues")** check box.
10. Click **OK**. The report is redisplayed on the Report tab in the right pane with only the Errata annotations.

Converting RealLegal Binder Cases to West LiveNote Cases

When you open a RealLegal Binder case in West LiveNote version 1.1 or later, the properties for the case may or may not be converted. The following chart describes how the RealLegal Binder case properties are converted.

ITEMS THAT ARE CONVERTED	ITEMS THAT ARE NOT CONVERTED
Transcripts • transcript text • transcript properties: Type, Status, Last, First, Volume, Date, Title, Taking Attorney, For, Comment • links to documents from transcripts • signature for signed transcripts (version 7.0 and later) • video sync information	Transcripts • transcript properties: Time, Plaintiff, Defendant
Documents • document contents • document properties: Type, Author, Recipient, Bates Range, Date, OCR information	Documents • document properties: Title • exhibit check box data, exhibit number, exhibit prefix
Annotations • all annotations • issues, including name and color • attachment URLs are preserved • comments converted to notes	Annotations • chronology date • active issue properties • annotations authors only converted when imported into a secure case
Search groups • search groups converted to data groups • search group name converted to data group title • transcripts and documents from the search group converted to data group	Search groups • preprogrammed search groups that come with RealLegal Binder • saved reports

Prompts and Messages for Video and PowerPoint

You may receive the following warnings and error messages when transferring files as video or to PowerPoint.

The file [PowerPoint file name] already exists. Do you want to append slides to existing presentation [or] overwrite existing file?

In most cases you will want to append or add slides to the existing PowerPoint presentation. Refer to "Transferring Annotations to Microsoft PowerPoint" on page 46 for more information.

The file is open in PowerPoint. Please close PowerPoint and retry.

PowerPoint needs to be closed when you are creating a presentation or appending slides to an existing presentation.

The folder already contains file named [video file name]. Would you like to replace this file?

This error usually occurs when you try to transfer the same annotation twice or when you try to save over an existing PowerPoint presentation. If you do not want to replace the file, you can cancel the transfer and review the annotation to make sure nothing has changed and then resave the file, or you can save the file to a different folder.

Synchronized video is not associated with this transcript.

The video has not been synchronized with the transcript. A synchronized video is a video that plays in sync with the transcript; i.e., as the person in the video speaks, the transcript scrolls and highlights the spoken text. A utility (e.g., RealLegal Publisher) must be used to synchronize the video with the transcript; otherwise, the video plays but the transcript does not scroll.

Video does not exist for this transcript.

No video is associated with the transcript. You can transfer an annotation to PowerPoint, but not video.

Cannot create clip from annotation that spans more than one file.

This is a catchall error message designed for unsupported scenarios. Please contact West LiveNote Customer Technical Support at 1-800-290-WEST (1-800-290-9378) and describe what you were doing when this error occurred.

Video clips can only be created from MPEG and WMV video files.

West LiveNote only supports specific types of video files. For example, you cannot create video clips from RM (Real) or AVI (Audio Video Interleave) files.

Failed to create temporary PowerPoint template file! Error code %d.

This error may occur when your hard drive is full or if you do not have access rights to the hard drive where you are attempting to transfer the file.

In order to create PowerPoint slides, you must first install PowerPoint on this computer.

PowerPoint must be installed before you can transfer annotations to PowerPoint.

Connecting to a Simulated Realtime Transcript

When West LiveNote is installed, it provides you with a demonstration case, which includes sample deposition transcripts, exhibits, preset issues, and simulation of a real-time deposition. You can use the simulated transcript to practice using the basic tools of West LiveNote.

To access the simulation, complete these steps:

1. Access West LiveNote.
2. When the Open Case dialog box is displayed, select **Gil Bower v. DC Corporation** and click **OK**. The case window is displayed.
3. Click the **New** arrow on the Main Menu toolbar, then choose **Realtime Transcript** from the menu. The Connect to Realtime dialog box is displayed (Figure 0-1).

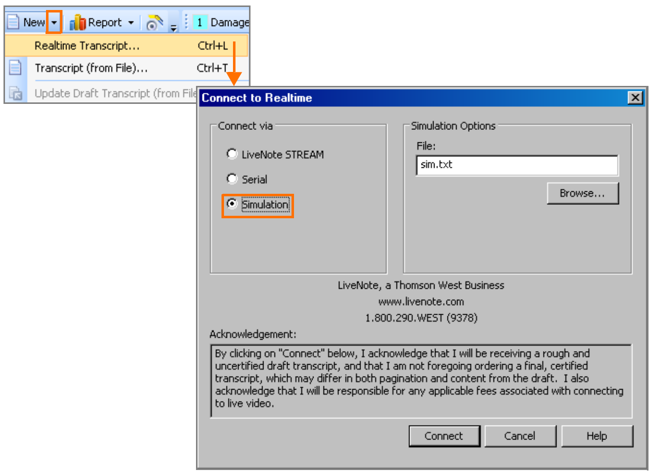


Figure 0-1. Connect to Realtime dialog box

4. Select **Simulation**, then click **Connect**. The deposition automatically begins transcribing in the right pane.

Note 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 choose **Properties** from the menu. The Transcript Properties dialog box is displayed. Type a different title for the transcript in the *Title* text box and click **OK**.

Trial Version of West Case Notebook

West LiveNote offers a trial version of its software that includes the functionality of West Case Notebook. In the trial version, you can

- connect to 15 Realtime sessions
- add up to three transcripts, 10 documents, five pleadings, 10 research files, 25 key facts, and 10 characters
- create Issue Marks, Quick Marks, and annotations
- use the Word Index, Auto Tags, and Full Text Search (not available for some file formats added to the trial version)
- insert exhibits, transcript questions, and Westlaw documents into an outline
- send key facts to West Case Timeline, Microsoft Word, or Corel WordPerfect
- generate reports

In the trial version, you cannot

- update transcripts, documents, pleadings, and research files
- create outlines
- delete any items from the demonstration case
- save transcripts as ASCII files
- create a new case
- close the current case and open another case
- export cases
- connect to the West LiveNote Repository

Notes

- A transcript printed from the trial version includes a *Demo* watermark.
- Optical character recognition (OCR) technology is not available in the trial version of West Case Notebook.

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