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WESTLAW CASE NOTEBOOK
ADMINISTRATION
USER GUIDE

APRIL 2012



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Thomson Reuters
610 Opperman Drive
Eagan, MN 55123-1396

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1 Introduction

Westlaw Case Notebook Administration is used in conjunction with Westlaw Case Notebook Repository to manage access to Westlaw Case Notebook or Westlaw Case Notebook (Transcripts), both referred to in this guide as Case Notebook, cases that are shared across a network. You add Case Notebook cases and users to the repository, then you manage access to the cases by assigning attributes to both the cases and the users through Case Notebook Administration.

Note

- You must install and license Case Notebook Repository before using Case Notebook Administration.
- The cases added to the repository are called secure cases. Only secure cases can be shared across a network. There are two types of secure cases:
 - **managed cases** to which only authorized users have access and you, as the administrator, control the level of access for each user in each case
 - **unmanaged cases** to which all users have access
- Users are assigned seats for Case Notebook and Westlaw Case Notebook Remote Access Server (RAS). A seat allows the user to access and share cases on the network. See “Information on User Settings” on page 4 for more information about seats.
- If you are working on a secure case with other users, all users must use the same version of Case Notebook. For example, if you are working in Case Notebook version 3.0, then all users working on the case must use Case Notebook version 3.0.

Preliminary Steps

After you install Case Notebook Repository and Case Notebook Administration, you must complete the licensing requirements for Case Notebook Repository before you can access Case Notebook Administration. To license Case Notebook Repository, complete these steps:

1. Access Case Notebook Administration. The Repository License Installation dialog box is displayed (Figure 1-1).

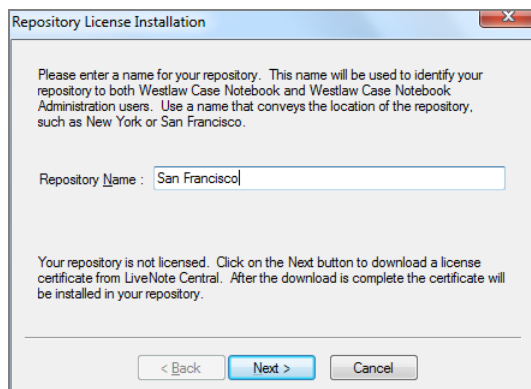


Figure 1-1. Repository License Installation dialog box

2. In the **Repository Name** box, type a name for the repository, e.g., **San Francisco**.

3. Click **Next**. The Create an Administrator Account dialog box is displayed (Figure 1-2).

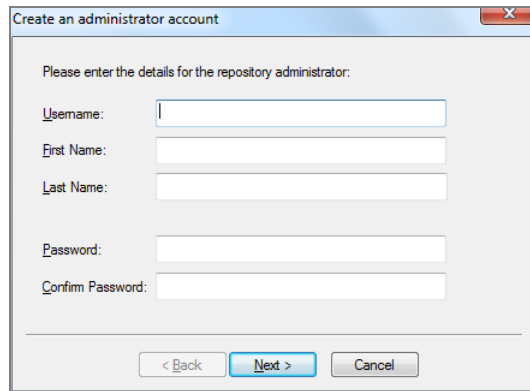


Figure 1-2. Create an Administrator Account dialog box

4. In the **Username** box, type a username, e.g., **Admin**. This is the username you, as the administrator, will use to access Case Notebook Administration.
5. In the **First Name** box, type your first name.
6. In the **Last Name** box, type your last name.
7. In the **Password** and **Confirm Password** boxes, type a password. This is the password you will use to access Case Notebook Administration.
8. Click **Next**. The Repository Licensing Complete dialog box is displayed (Figure 1-3).

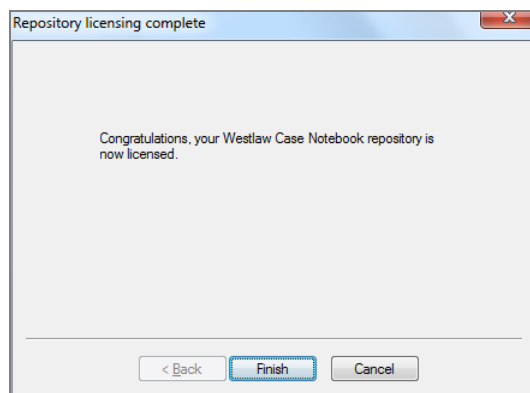


Figure 1-3. Repository Licensing Complete dialog box

9. Click **Finish**. The Case Notebook Administration window is displayed.

Using the Westlaw Case Notebook Administration Window

The Case Notebook Administration window contains tabs for cases, users, and groups. Depending on the tab that is displayed, information for the cases, users, or groups in the repository is displayed in the left pane. The details for a particular case, user, or group are displayed in the Active View pane on the right.

For example, on the Cases tab in Figure 1-4 below, the left pane shows

- the names of the cases in the repository
- the location of the cases
- the client-matter numbers, if available

The Active Case View pane on the right displays the details for a particular case, including

- the name of the case
- whether the case is managed (📁) or unmanaged (📁)
- groups added to the case
- users added to the case
- users who have replicated the case offline
- users who currently have the case open

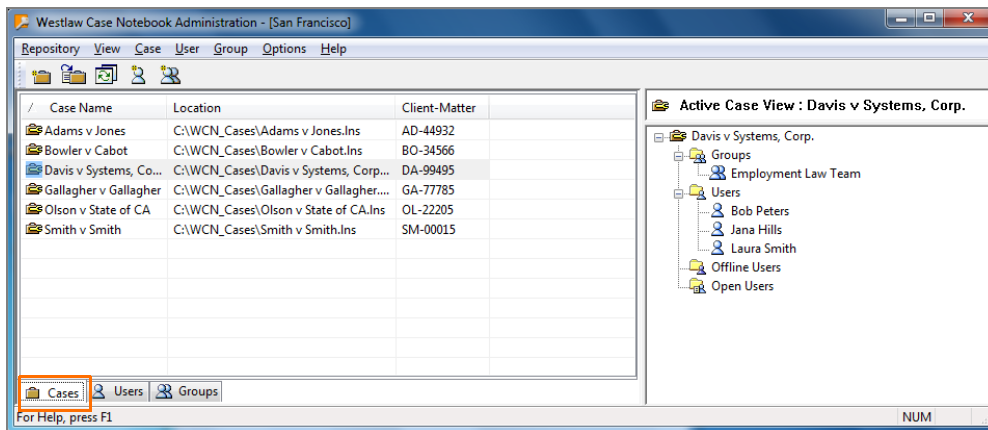


Figure 1-4. Westlaw Case Notebook Administration window

2 Working with Users

When you add a user to Case Notebook Administration, you assign seats, a user type, a user state, and permissions to the user.

Information on User Settings

SEATS

Seats are obtained when you purchase Case Notebook or RAS and become available when you license your secure cases repository. When you create a user account, the user is automatically allocated a seat for Case Notebook or RAS if available. Only users who have been assigned a seat can access secure cases.

Note You can reassign seats when there are changes in staff and you can purchase more seats when no seats are available. To reassign the license for a seat or purchase new seats, contact Customer Technical Support at 1-800-290-9378.

USER TYPES

You assign a user type to designate the level of access a user has to a secure case.

- **External User.** External users have the lowest level of access to cases. (For example, you may want to give external user status to clients or experts who are not a part of the organization.) They can
 - view transcripts, documents, pleadings, research files, linked documents, and videotaped depositions
 - search the full text of transcripts and linked documents and print them
 - set options for Case Notebook or RAS

When working on a case offline, external users can

- create new transcripts and connect to a real-time deposition
- create and delete Auto Tags
- update and delete transcripts created while the case is offline

Note Offline changes made by external users are not replicated back to the network case.

- **Reader User.** Reader users can perform all external user tasks. They also can
 - view all annotations, Issue Marks, and Quick Marks
 - view and print reports
 - search annotations

Note Offline changes made by reader users are not replicated back to the network case.

- **Author User.** Author users can perform all reader user tasks. They also can
 - create annotations, Issue Marks, and Quick Marks
 - edit annotations
 - create, edit, and delete new issues in cases that have been replicated offline
 - cut and paste and delete annotations and Quick Marks in cases that have been replicated offline

Note Offline changes, except changes to Auto Tags, made by author users are replicated back to the network case.

- **Editor User.** Editor users can perform all author user tasks. They also can
 - edit and delete annotations, Issue Marks, Quick Marks, key facts, and reports created by others
 - when working on an offline case, cut and paste and delete annotations and Quick Marks created by other users

Editor users cannot

- when working on a network case, edit or delete annotations created by another user who has replicated the case offline

Note Offline changes, except changes to Auto Tags, made by editor users are replicated back to the network case.

- **Power User.** Power users can perform all editor user tasks. They also can
 - create and manage transcripts, documents, pleadings, research files, and groups
 - open a network case and connect to a real-time deposition, then manage the case index and thesaurus

Power users cannot

- when working on a network case, edit the annotations created by another user who has replicated the case offline
- when working on an offline case, edit annotations created by other users; create, edit, or delete transcript groups; edit the properties of existing transcripts; or delete existing transcripts

- **Case Manager.** Case managers manage all aspects of a case that affect all users. They also can
 - create and manage issues, annotations, Quick Marks, and Auto Tags
 - edit case properties
 - create and delete issues in cases that have been replicated offline

Note All users are automatically given case manager status in unmanaged cases, regardless of their user type in managed cases.

USER STATES

You assign a user state to designate the level of activity for a user.

- **User is active.** This state enables the user to access secure cases, provided the user has a seat for the product.
- **User is not active.** This state prevents the user from accessing secure cases.

Note If you change a user's state to inactive, the user's annotations in a transcript are preserved in the user's name. If you delete a user, all of the user's annotations are labeled as "unknown."

USER PERMISSIONS

You assign permissions to designate the level of privileges for a user.

- **Administrative Privileges.** Administrative privileges allow the user to use Case Notebook Administration. For example, you may want to give administrative privileges to litigation support or technical staff.
- **Power Editor.** This permission is available only when the user has a case replicated offline. It enables the user to modify others users' annotations, Quick Marks, and Issue Marks. When the user replicates the case back to the network, any changes the user has made override the existing annotations, Quick Marks, and Issue Marks.

Note Assign this permission with extreme caution. The work product of other users may be lost when replicating the case back to the network.

- **Replicate Case.** This allows the user to replicate cases offline. It is selected by default. You can remove this privilege for all or only certain cases.

Adding Users

To add a user to Case Notebook Administration, you must create an account for the user. When you create a user account, you assign a seat, user type, user state, and permissions to the user.

To create a user account, complete these steps:


1. Click the **Add User** button () on the toolbar at the top of the Case Notebook Administration window. The Add New User dialog box is displayed (Figure 2-1).

Figure 2-1. Add New User dialog box

2. In the **Username** box, type a username, e.g., **jims**.
 3. In the **First Name** box, type the user's first name, e.g., **Jim**.
 4. In the **Last Name** box, type the user's last name, e.g., **Smith**.
 5. In the **Password** and **Confirm Password** boxes, type the user's password, e.g., **password**.
 6. Select the **User cannot change password** check box if you do not want the user to change the password.
 7. Select the **User must change password at next logon** check box if you want the user to change the password when he or she logs on for the first time.
 8. Under Default permissions, in the **User Type** list, click **Case Manager**, **Power User**, **Editor User**, **Author User**, **Reader User**, or **External User**. See "Information on User Settings" on page 4 for information on user types and other user settings.
 9. In the **User State** list, click either **User is active** or **User is not active**.
 10. Under Additional User Permissions, select the **Administrative Privileges** or **Power Editor** check box, if desired.
 11. Clear the **Replicate Case** check box, if desired.
 12. Under Allocate, clear the **Westlaw Case Notebook Seat** or **RAS Web Seat** check box, if desired.
- Note** If there are not enough seats for the user, the check box will be unavailable.
13. Click **OK**. The user is added to the list of users in the repository on the Users tab in the left pane and details for the user are displayed in the Active User View pane on the right.

Assigning, Reassigning, and Removing Seats

When you create a user account, the user is automatically allocated a seat if any are available. You may, however, need to assign, reassign, or remove seats after you create a user account.

To assign, reassign, or remove a user's seat, complete these steps:

1. Click the **Users** tab in the lower-left corner of the Case Notebook Administration window (Figure 2-2). The users in the repository are displayed in the left pane.

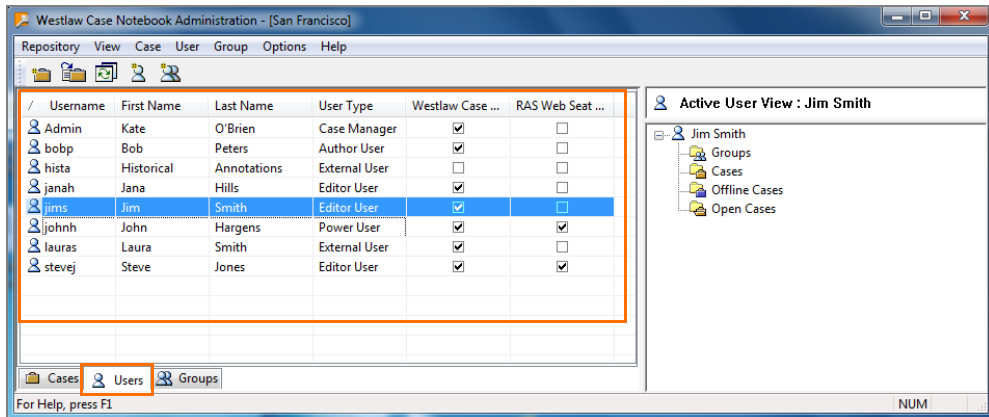


Figure 2-2. Users tab

2. Select or clear the check boxes next to the user's name in the Westlaw Case Notebook or RAS Web Seat column to assign, reassign, or remove a user's seat.

Changing User Details

You can change the information for a user such as the username, first name, last name, password, user type, user state, or permissions. To change this information, complete these steps:

1. Click the **Users** tab in the lower-left corner of the Case Notebook Administration window. The users in the repository are displayed in the left pane.
2. Right-click the user for which you want to change the information and click **Edit** on the menu. The Edit User dialog box is displayed (Figure 2-3).

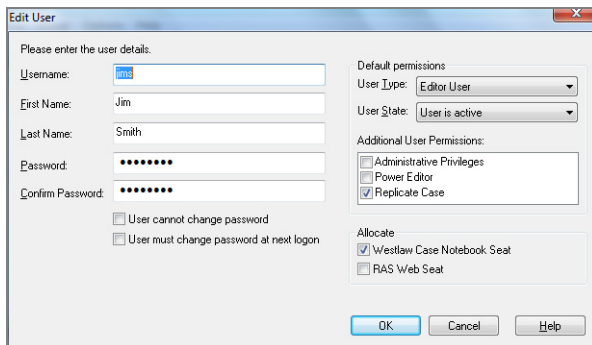


Figure 2-3. Edit User dialog box

3. Make your changes and click **OK**.

Deleting a User

To delete a user, complete these steps:

1. Click the **Users** tab in the lower-left corner of the Case Notebook Administration window. The users in the repository are displayed in the left pane.
2. Right-click the user you want to delete and click **Delete** on the menu.
3. A message asking whether you are sure you want to delete the selected user is displayed. Click **Yes**. The user is permanently removed from the repository.

Note If you delete a user, all of the user's annotations are labeled as "unknown."


3 Working with Groups

You can create a group that contains a number of users. You can then add the group to a case, rather than adding the users individually to a case.

Note If a user is a member of a group and you change the user's type or permissions, those changes will apply to any case to which that group is assigned.

Creating a Group

To create a group, complete these steps:

1. Click the **Add Group** button () on the toolbar at the top of the Case Notebook Administration window. The Add New Group dialog box is displayed (Figure 3-1).

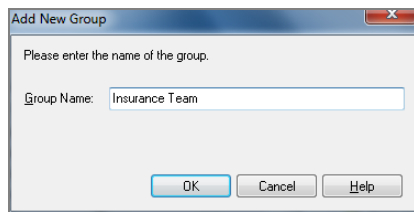


Figure 3-1. Add New Group dialog box

2. In the **Group Name** box, type a name for the group, e.g., **Insurance Team**.
3. Click **OK**. The group is added to the list of groups on the Groups tab in the left pane and the details for the group are displayed in the Active Group View pane on the right.

Changing the Name of a Group

To change the name of a group, complete these steps:

1. Click the **Groups** tab in the lower-left corner of the Case Notebook Administration window. The groups in the repository are displayed in the left pane.
2. Right-click the group for which you want to change the name and click **Edit** on the menu. The Edit Group dialog box is displayed.
3. In the **Group Name** box, type a new name.
4. Click **OK**.

Adding and Removing Users

ADDING USERS TO A GROUP

To add users to a group, complete these steps:

1. Click the **Groups** tab in the lower-left corner of the Case Notebook Administration window. The groups in the repository are displayed in the left pane.
2. Double-click the group to which you want to add users. The group is displayed in the Active Group View pane on the right.
3. Click the **Users** tab in the lower-left corner of the Case Notebook Administration window. The users in the repository are displayed in the left pane (Figure 3-2).

4. Select the users you want to add to the group. Use one of the following methods to add the users to the group:
 - Drag the users to the Users folder in the Active Group View pane on the right.
 - Right-click the users and click **Add to active group** on the menu.

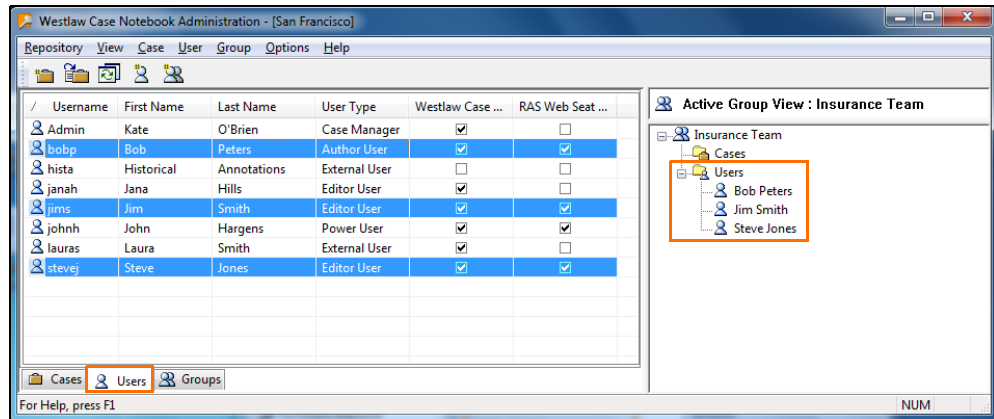


Figure 3-2. Users tab

REMOVING A USER FROM A GROUP

To remove a user from a group, complete these steps:

1. Click the **Groups** tab in the lower-left corner of the Case Notebook Administration window. The groups in the repository are displayed in the left pane.
2. Double-click the group from which you want to remove users. The group is displayed in the Active Group View pane on the right.
3. Right-click the user you want to remove in the Users folder in the Active Group View pane and click **Remove from active group** on the menu.

Deleting a Group

To delete a group, complete these steps:

1. Click the **Groups** tab in the lower-left corner of the Case Notebook Administration window. The groups in the repository are displayed in the left pane.
2. Right-click the group you want to delete and click **Delete** on the menu.
3. A message asking whether you are sure you want to delete the selected group is displayed. Click **Yes**. The group is permanently removed from the repository.


4 Working with Cases

With Case Notebook Administration, you can

- create a new case
- import one case or several cases
- add and remove users
- add and remove groups
- set cases as replicated to the network or offline
- set case-based user type and permissions
- change case details
- move a case
- delete a case

Creating a New Case

To create a new case, complete these steps:

1. Click the **New Case** button () on the toolbar at the top of the Case Notebook Administration window. The Add New Case dialog box is displayed (Figure 4-1).

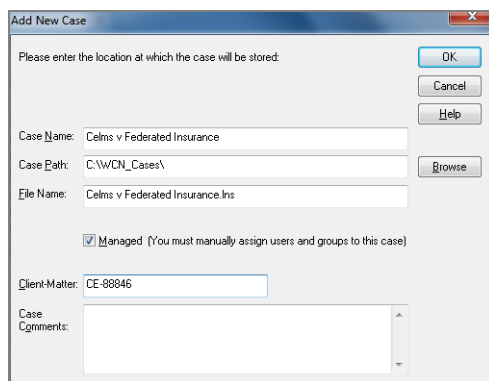


Figure 4-1. Add New Case dialog box


2. In the **Case Name** box, type the name of the case, e.g., **Celms v Federated Insurance**.
3. In the **Case Path** box, type the location for the case. In the alternative, click **Browse** to display the Select the Location of the Case dialog box. Select the location for the case and click **Save**.
4. The case name is entered by default in the File Name text box. If desired, change the file name.
5. Select the **Managed** check box if you want to manually add users and groups to the case.
6. In the **Client-Matter** box, type a client-matter number, if desired.
7. In the **Case Comments** text box, type a comment, if desired.
8. Click **OK**. Your case is added to the list of secure cases in the repository on the Cases tab.

Importing a Case

You can import a case created in Case Notebook into Case Notebook Administration to create a secure case. If the case you are importing contains annotations, you must assign a user as the author of the annotations.

Note If you do not want to assign a current user as author of all the annotations or do not know the author of the annotations, you can create a fictitious user, e.g., **Historical Annotations**, to assign as author of the annotations. This will ensure the annotations are available for use on the network. See “Setting Cases As Replicated to Offline or to the Network” on page 16 for more information on online use.

To import a case, complete these steps:

1. On the **Case** menu, click **Import**. In the alternative, click the **Import Case** button () on the toolbar at the top of the Case Notebook Administration window. The Select the Case to Import dialog box is displayed.
2. Click **Browse** to display the Browse for a Local Case dialog box (Figure 4-2).

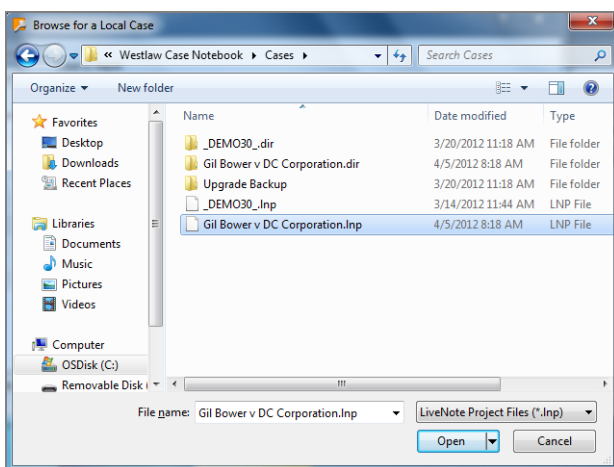


Figure 4-2. Browse for a Local Case dialog box

3. Go to the folder where your Case Notebook cases are located and select the .Inp file for the case you want to import, e.g., **Gil Bower v DC Corporation.Inp**.
4. Click **Open**. The Select the Case to Import dialog box is redisplayed.
5. Click **Next**. If the case includes annotations, the Select an Owner dialog box is displayed (Figure 4-3).

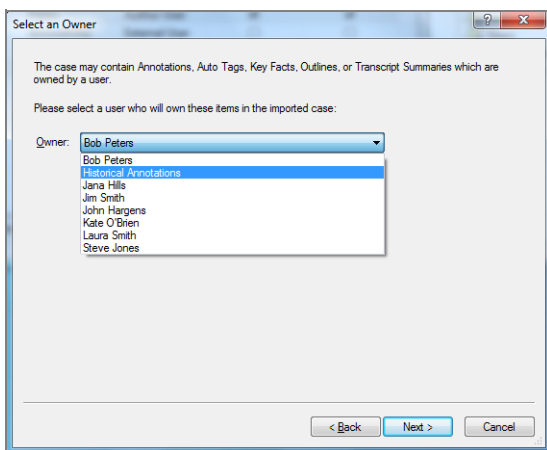


Figure 4-3. Select an Owner dialog box

6. In the **Owner** list, click a name, e.g., **Historical Annotations**, and click **Next**. The Select the Destination Location dialog box is displayed (Figure 4-4).

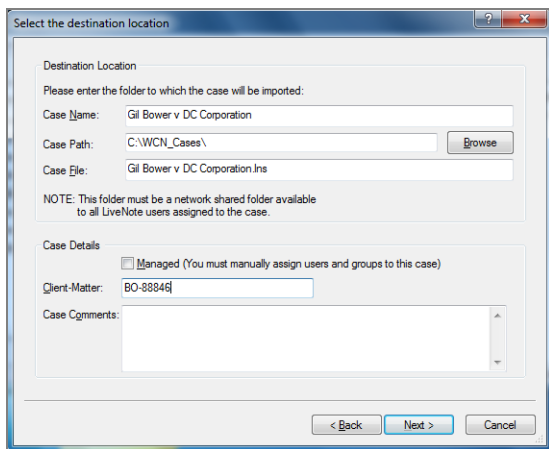



Figure 4-4. Select the Destination Location dialog box

7. In the **Case Name** box, type a different case name, if desired.
8. In the **Case Path** box, type a different location, if desired.
9. In the **Case File** box, type a different case file name, if desired.
10. Under Case Details, select the **Managed** check box if you want to manually add users and groups to this case.
11. In the **Client-Matter** box, type a client-matter number, if desired.
12. In the **Case Comments** box, type a comment, if desired
13. Click **Next** to display the Import Completed dialog box.
14. Click **Finish**. Your case is added to the list of secure cases in the repository on the Cases tab.

Importing a RealLegal Binder Case

You can import a RealLegal Binder case, version 5 or later, into Case Notebook Administration version 1.1 or later. To import a RealLegal Binder case, complete these steps:

1. On the **Case** menu, click **Import**. In the alternative, click the **Import Case** button () on the toolbar at the top of the Case Notebook Administration window. The Select the Case to Import dialog box is displayed.
2. Click **Browse** to display the Browse for a Local Case dialog box.
3. Go to the folder where your RealLegal Binder cases are located and select the .pxl file for the case you want to import.
4. Click **Open**. The Select the Case to Import dialog box is redisplayed.
5. Click **Next**. The Select the Destination Location dialog box is displayed.
6. In the **Case Name** box, type a case name.
7. In the **Case Path** box, type a different location, if desired.
8. In the **Case File** box, type a different case file name, if desired.
9. Under Case Details, select the **Managed** check box if you want to manually add users and groups to this case.
10. In the **Client-Matter** box, type a client-matter number, if desired.

11. In the **Case Comments** box, type a comment, if desired
12. Click **Next** to display the Import Completed dialog box.
13. Click **Finish**. Your case is added to the list of secure cases in the repository on the Cases tab.

Importing Several Cases

You can import several cases at once using the batch import function. You can import a group of cases or import a folder that contains cases.

To import several cases at once, complete these steps:

1. On the **Case** menu, click **Batch Import**. The List of Cases to Import dialog box is displayed.
2. Click one of the following:
 - **Add cases**. The Select One or More Case Files to Import dialog box is displayed. Select the .Inp files for the cases you want to import and click **Open**. The List of Cases to Import dialog box is displayed.
 - **Add folder**. The Browse for Folder dialog box is displayed. Select the folder that contains the cases you want to import and click **OK**. The List of Cases to Import dialog box is displayed.
3. Click **Next**. The Select an Owner dialog box is displayed.
4. Click one of the following:
 - **Prompt for an owner for each case**.
 - **Use the following owner for all imported cases**. In the **Owner** list, click a name.
5. Click **Next**. The Select the Destination Location dialog box is displayed.
6. In the **Case Path** text box, type a different location for the cases, if desired.
7. Click **Next**. Case Notebook Administration begins importing the cases.
8. If you specified in Step 4 that you wanted to choose an annotation owner for each case as it is imported, the Select an Owner for Any Applicable Items in Case dialog box is displayed for each case. In the **Owner** list, click a name, then click **OK**.
9. Once the cases have been imported, the Batch Import Completed dialog box is displayed. If desired, click **Save Report** to save a report of the batch import. The Save the List of Files That Did Not Import to dialog box is displayed.
10. Select the location for the report and click **Save**.
11. Click **Finish**. The cases are added to the list of cases on the Cases tab.

Adding and Removing Users

ADDING USERS TO A CASE

A managed case can only be accessed by the users and groups added to it in Case Notebook Administration. When you add a user to a case, Case Notebook Administration gives the user a default user type and permissions, which you can change. See "Setting Case-Based User Type and Permissions" on page 17 for more information.

Note You do not need to add users or groups to an unmanaged case. All users in the repository are automatically given access to the case with Case Manager status.

To add users to a case, complete these steps:

1. Click the **Cases** tab in the lower-left corner of Case Notebook Administration window. The cases in the repository are displayed in the left pane.

2. Double-click the case to which you want to add users. The case is displayed in the Active Case View pane on the right.
3. Click the **Users** tab in the lower-left corner of the Case Notebook Administration window. The users in the repository are displayed in the left pane (Figure 4-5).
4. Select the users you want to add to the case. Use one of the following methods to add the users to the case:
 - Drag the users to the Users folder in the Active Case View pane on the right.
 - Right-click the users and click **Add to active case** from the menu.

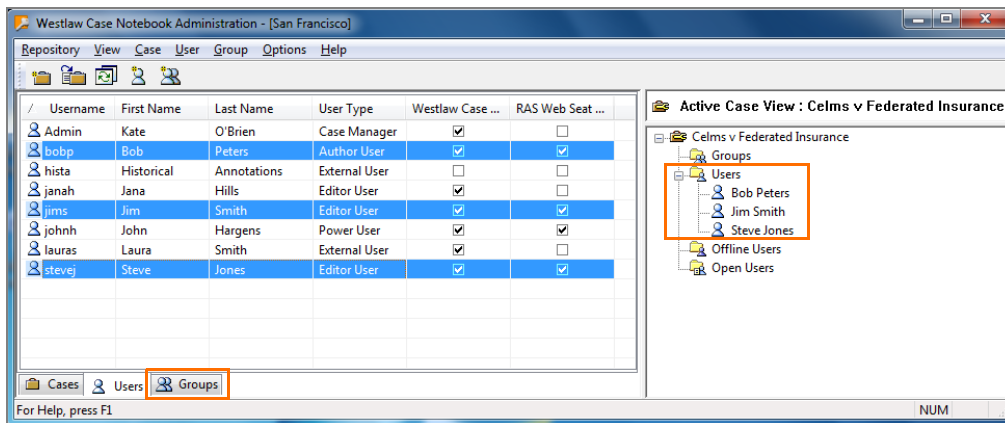


Figure 4-5. Users tab

REMOVING A USER FROM A CASE

To remove a user from a case, complete these steps:

1. Click the **Cases** tab in the lower-left corner of Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Double-click the case from which you want to remove users. The case is displayed in the Active Case View pane on the right.
3. Right-click the user you want to remove in the Users folder in the Active Case View pane and click **Remove from active case** from the menu.

Adding and Removing Groups

ADDING A GROUP TO A CASE

You can also add a group to a case. Each user in the group will have access to the case. If you add a group to a case and change a group member's user type and permissions for that case, those changes will also apply to other cases to which that group is added.

To add a group to a case, complete these steps:

1. Click the **Cases** tab in the lower-left corner of Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Double-click the case to which you want to add the group. The case is displayed in the Active Case View pane on the right.
3. Click the **Groups** tab in the lower-left corner of the Case Notebook Administration window. The groups in the repository are displayed in the left pane (Figure 4-6).
4. Select the group you want to add to the case. Use one of the following methods to add the group to the case:

- Drag the group to the Groups folder in the Active Case View pane on the right.
- Right-click the group and click **Add to active case** on the menu.

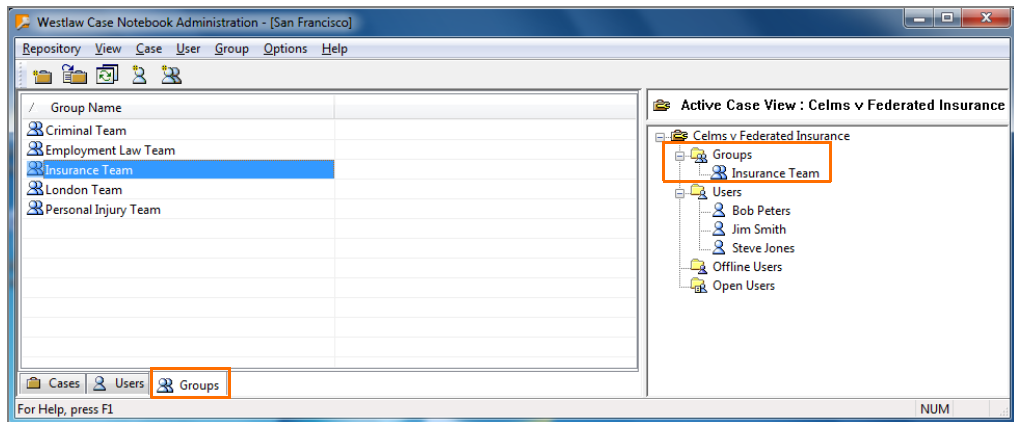


Figure 4-6. Groups tab

REMOVING A GROUP FROM A CASE

To remove a group from a case, complete these steps:

1. Click the **Cases** tab in the lower-left corner of the Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Double-click the case from which you want to remove the group. The case is displayed in the Active Case View pane on the right.
3. Right-click the group you want to remove in the Groups folder in the Active Case View pane and click **Remove from active case** on the menu.

Setting Cases As Replicated to Offline or to the Network

Case Notebook users can replicate a case offline for use off the network. Users can also replicate the case back to the network, or online. See “Replicating Cases Offline and to the Network” on page 28 for more information. In some situations, such as when a computer is stolen or has technical problems, you may need to set a case for a user as replicated to offline or to the network. To set a case as replicated to offline or to the network, change the case user to offline or online status.

SETTING CASES AS REPLICATED TO OFFLINE

To set a case as replicated to offline, complete these steps:

1. Click the **Cases** tab in the lower-left corner of the Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Double-click the case for which you want to change the user’s status. The case is displayed in the Active Case View pane on the right. The users with access to the case are listed in the Users folder.

3. Right-click the user you want to change to offline status and click **Mark this user offline in the repository** on the menu (Figure 4-7). The user is added to the Offline Users folder.

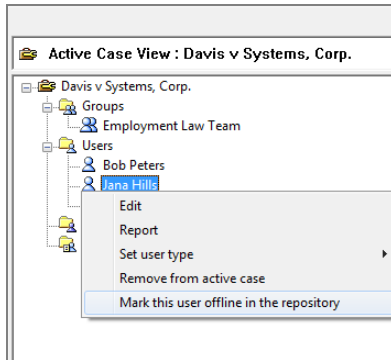


Figure 4-7. Displayed menu

Note When a user replicates a case offline, the user’s annotations in the case are not available to other users on the network. Other users can run reports and search and view the annotations of the offline user but cannot edit or delete them.

SETTING CASES AS REPLICATED TO THE NETWORK

To set a case as replicated to the network, complete these steps:

1. Click the **Cases** tab in the lower-left corner of the Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Double-click the case for which you want to change the user’s status. The case is displayed in the Active Case View pane on the right. The users who are currently working on the case offline are listed in the Offline Users folder.
3. Right-click the user you want to change to online status and click **Mark this user online in the repository** on the menu (Figure 4-8). The user is removed from the Offline Users folder.

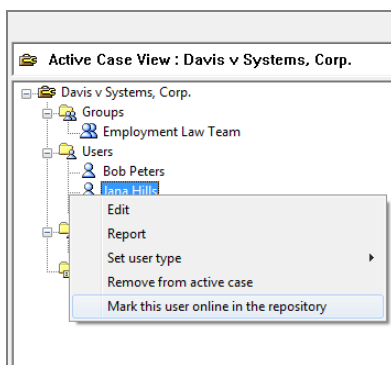


Figure 4-8. Displayed menu

Setting Case-Based User Type and Permissions

You can set special permissions for one or more users for a managed case that is particularly sensitive or requires strict user access. See “Information on User Settings” on page 4 for more information on user types and permissions.

Note To set case-based user types or permissions, you must add the user to the case individually, not as a member of a group.

CHANGING THE USER TYPE ONLY

To change the user type only, complete these steps:

1. Click the **Cases** tab in the lower-left corner of the Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Double-click the case for which you want to set case-based user types. The case is displayed in the Active Case View pane on the right.
3. The users with access to the case are listed in the Users folder. Right-click the user whose type you want to change. Click **Set user type** on the menu, then click **Case Manager**, **Power User**, **Editor User**, **Author User**, **Reader User**, or **External User** on the submenu (Figure 4-9). The user type for the user is changed for this case only. The user type does not change for the user on the Users tab or in a group.

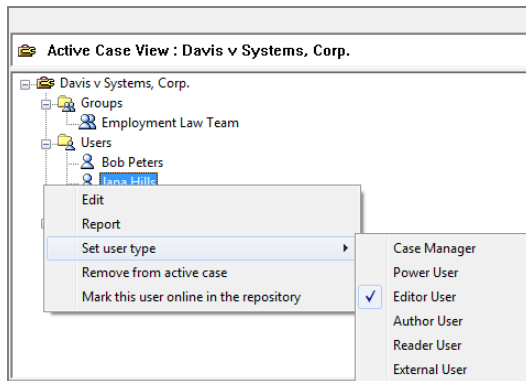


Figure 4-9. Set user type menu

CHANGING THE USER TYPE AND PERMISSIONS

1. Click the **Cases** tab in the lower-left corner of the Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Double-click the case for which you want to set case-based user types and permissions. The case is displayed in the Active Case View pane on the right.
3. The users with access to the case are listed in the Users folder. Right-click the user whose user type and permissions you want to change. Click **Edit** on the menu (Figure 4-10). The Edit User dialog box is displayed.

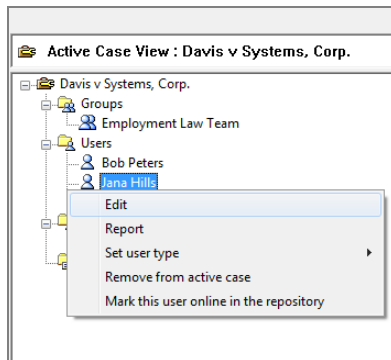


Figure 4-10. Menu

4. Under Case permissions, in the **User Type** list, click **Case Manager**, **Power User**, **Editor User**, **Author User**, **Reader User**, or **External User**.
5. Under Additional User Permissions, select or clear the **Administrator Privileges**, **Power Editor**, and **Replicate Case** check boxes.
6. Click **OK**.

Changing Case Details

You can change the information for a case such as the case name, location, client-matter number, and comments and whether the case is managed or unmanaged.

To change the details of a case, complete these steps:

1. Click the **Cases** tab in the lower-left corner of the Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Right-click the case for which you want to change the case information and click **Edit** on the menu. The Edit Case Properties dialog box is displayed (Figure 4-11).

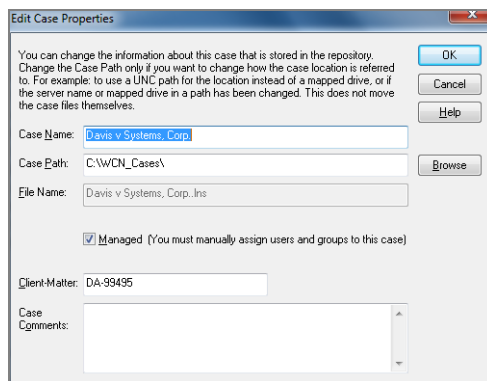


Figure 4-11. Edit Case Properties dialog box

3. To change the case name, location, client-matter number, or comment for the case, type the new information in the text boxes.
4. To change the managed status of the case, select or clear the **Managed** check box.
5. Click **OK**.

Note If you change the status of a case to

- managed, a message is displayed stating that any previously assigned users or groups have been restored to the managed case
- unmanaged, a message is displayed stating that all users will have access to this unmanaged case and that previously assigned users and groups will be restored if the case is set as managed again

Updating the Search Index

To update the search index, select the case you want to update in the list of cases on the Cases tab. Then, on the **Case** menu, click **Update Search Index**. When the update is complete, the Messages dialog box is displayed indicating the case was indexed successfully. Click **OK**.

Note To save a copy of the messages, click **Copy to Clipboard** to copy all the messages, then paste them into another program. The option to copy these messages is only available at this point. You cannot retrieve them later.

Rebuilding the Search Index

To update the search index, select the case you want to update in the list of cases on the Cases tab. Then, on the **Case** menu, click **Rebuild Search Index**. When the indexing is complete, the Messages dialog box is displayed indicating the case was indexed successfully. Click **OK**.

Note To save a copy of the messages, click **Copy to Clipboard** to copy all the messages, then paste them into another program. The option to copy these messages is only available at this point. You cannot retrieve them later.

Moving a Case

You can move a case to another location, if desired. To move a case, complete these steps:

1. Click the **Cases** tab in the lower-left corner of the Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Right-click the case you want to move and click **Move** on the menu. The Select Where You Want to Move Case dialog box is displayed.
3. Select the new location for the case and click **Save**.

Deleting a Case

To delete a case, complete these steps:

1. Click the **Cases** tab in the lower-left corner of the Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Right-click the case you want to delete and click **Delete** on the menu.
3. A message asking whether you are sure you want to delete the case is displayed. Click **Yes**. The case is permanently removed from the repository.

5 Changing the Ownership of Annotations, Auto Tags, and Key Facts

Users who are case managers can change the ownership of annotations and Auto Tags for Case Notebook (Transcripts) cases and the ownership of annotations, Auto Tags, and key facts for Case Notebook cases. Changing ownership would be necessary if, for example, the owner is no longer working on a case. To change the owner of annotations, Auto Tags, and key facts, complete these steps:

1. Click the **Cases** tab in the lower-left corner of the Case Notebook Administration window. The cases in the repository are displayed in the left pane.
2. Select the case for which you want to change the ownership of the annotations, Auto Tags, and key facts.
3. On the **User** menu, click **Change Ownership**. The Change Owner dialog box is displayed (Figure 5-1).

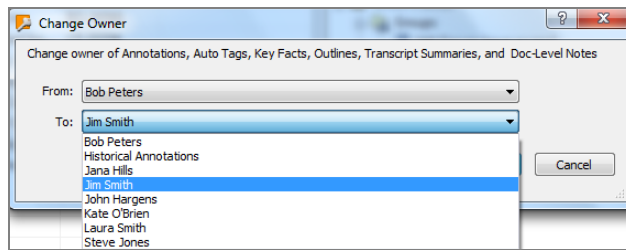


Figure 5-1. Change Owner dialog box

4. In the From list, the current owner of the annotations, Auto Tags, and key facts is displayed. In the To list, click a different name, e.g., **Jim Smith**.
5. Click **OK**.

6 Working with Active Directory Authentication

Active Directory authentication allows Case Notebook users to use their network usernames and passwords when accessing cases through Case Notebook Administration. Active Directory authentication compares the usernames and passwords in Case Notebook Administration with usernames and passwords in the Windows Server 2003, Windows Server 2008, or Windows Server 2008 R2 Active Directory.

Notes

- Active Directory authentication is not compatible with LiveNote Enterprise Server version 9.
- Before you, as an administrator, enable Active Directory authentication, your username and password must be added to Active Directory.
- Before you enable Active Directory authentication, Case Notebook users must be listed in Active Directory and must know their usernames and passwords.
- You can use the LiveNote Admin Tool to schedule an automatic update of groups and users from Active Directory. For more information on this feature, see “LiveNote Admin Tool” on page 32.

Importing Groups and Users from Active Directory

To import groups and users from Active Directory, complete these steps:

1. On the **Repository** menu, click **Import Group/User List**. The Select the Import Source dialog box is displayed (Figure 6-1).

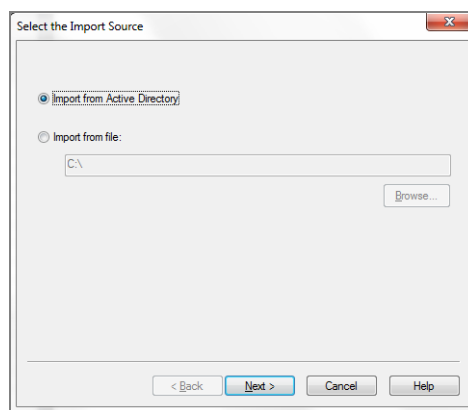


Figure 6-1. Select the Import Source dialog box

2. Click **Next**. The Select the Users to Import dialog box is displayed (Figure 6-2).

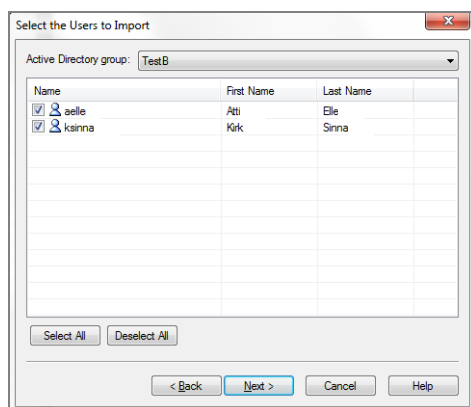


Figure 6-2. Select the Users to Import dialog box

3. In the **Active Directory Group** list, click a group, if desired. The users in the group are listed in the dialog box. If you do not want to include a user, clear the check box to the left of the user's name.
4. Click **Next**. The Select Default User Settings dialog box is displayed.

Note The information in this dialog box is applied to all imported users.

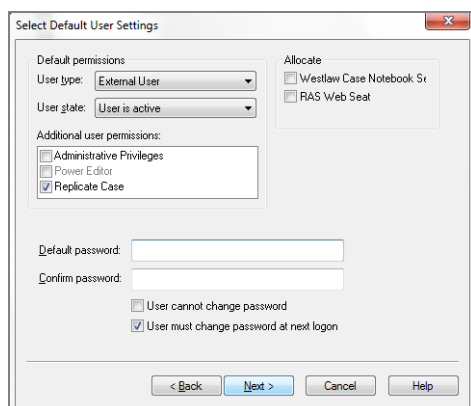


Figure 6-3. Select Default User Settings dialog box

5. Under Default permissions, in the **User Type** and **User State** lists, click a user type and user state. See "Information on User Settings" on page 4 for information on these and other user settings.
6. Under Additional user permissions, select the **Administrative Privileges** check box or clear the **Replicate Case** check box, if desired.
7. Under Allocate, select the Westlaw Case Notebook or RAS Web Seat check box, if desired.
8. In the **Default Password** and **Confirm Password** text boxes, type a password. This creates the same password for all imported users.
9. Clear the **User cannot change password** check box, if desired. Because you are giving all imported users the same password, it is recommended that you clear this check box.
10. Select the **User must change password at next logon** check box, if desired. Because you are giving all imported users the same password, it is recommended that you select this check box.
11. Click **Next**. The Select the Groups to Import dialog box is displayed. This dialog box relates to the Select the Users to Import dialog box. For example, if you selected the Litigation group in the

Select the Users to Import dialog box and then select the same group in this dialog box, a group called Litigation is created with the specified users when the Active Directory is imported.

12. Click **Finish**. The Group/User List Import dialog box is displayed.
13. Click **Close**. The users are added to the repository and listed on the Users tab.

Enabling Active Directory Authentication

To enable Active Directory authentication, complete these steps:

1. On the **Options** menu, click **Default Options**. The Default Options dialog box is displayed (Figure 6-4).

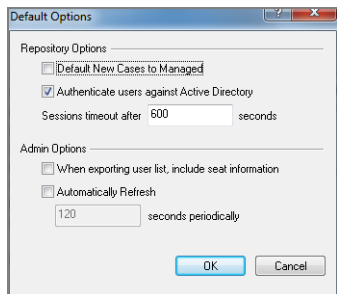


Figure 6-4. Default Options dialog box

2. Select the **Authenticate users against Active Directory** check box.
3. Click **OK**. One of the three following messages is displayed:
 - **WARNING:** Enabling Active Directory authentication means users must use their Active Directory username and password to access Westlaw Case Notebook and/or Westlaw Case Notebook Administration. Enabling Active Directory authentication without first configuring your repository could result in users not having access to Westlaw Case Notebook and/or Westlaw Case Notebook Administration. Do you want to continue?
Click **Yes**.
 - **WARNING:** The administrative user 'your username' does not currently exist in Active Directory. Enabling Active Directory Authentication means an Active Directory username and password are required to access the Repository. Because you do not have an Active Directory username and password, you will be unable to access Repository and Westlaw Case Notebook Administration. Do you want to continue?
Click **No**. Add your username and password to Active Directory, and create an account for yourself with the same username and password used in Case Notebook Administration. Otherwise, the next time you log on to LiveNote Administration, you will be locked out.
 - **ERROR:** Enabling Active Directory authentication means an Active Directory username and password are required to access the Repository. Currently, no Westlaw Case Notebook administrators have an Active Directory username and password. Create a Westlaw Case Notebook administrator username and password for a user in Active Directory and enable Active Directory authentication.
Click **Close**. Add your username and password to Active Directory, and create an account for yourself with the same username and password used in Case Notebook Administration.

7 Working with Westlaw Case Notebook

You interact with Case Notebook Administration when you access secure cases in Case Notebook. Below are features and settings in Case Notebook that apply to Case Notebook Administration.

Accessing Secure Cases

To access secure cases in Case Notebook, complete these steps:

1. Access Case Notebook. Or in an open case, on the **File** menu, click **Open Case**. The Open Case dialog box is displayed (Figure 7-1).

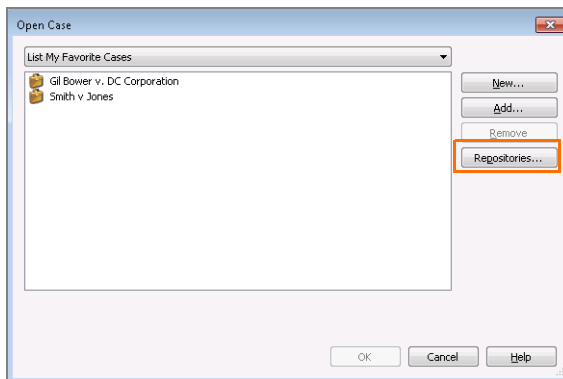


Figure 7-1. Open Case dialog box

2. Click **Repositories**. The Repositories dialog box is displayed (Figure 7-2).

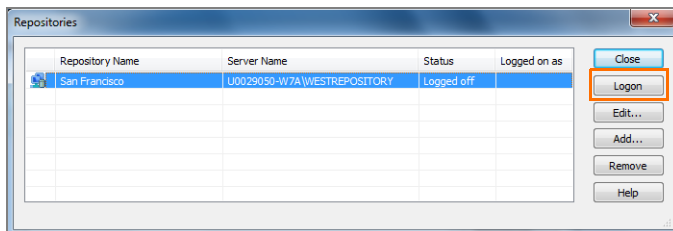


Figure 7-2. Repositories dialog box

3. Select the repository that you want to log on to and click **Logon**. The Logon to [Repository Name] dialog box is displayed (Figure 7-3).

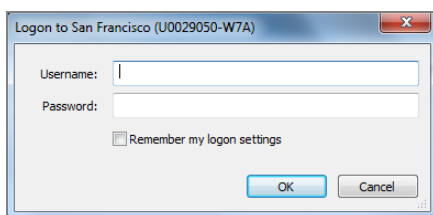


Figure 7-3. Logon to [Repository Name] dialog box

4. In the **Username** and **Password** boxes, type your username and the password that is assigned to you in Case Notebook Administration.

5. Select the **Remember my logon settings** check box if you want Case Notebook to remember your username and password.
6. Click **OK**. The Repositories dialog box is redisplayed (Figure 7-4).

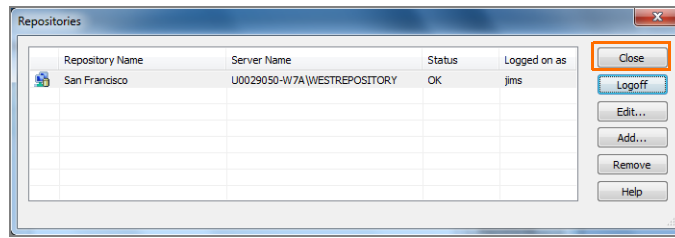


Figure 7-4. Repositories dialog box

7. Click **Close**. The Open Case dialog box is redisplayed with a list of the cases to which you are assigned (Figure 7-5).

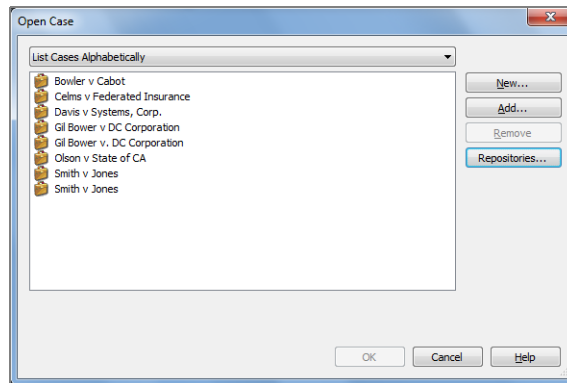


Figure 7-5. Open Case dialog box

Note Two types of folders may be displayed:

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

To view only secure cases, click **List Cases by Repository** in the 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**.

Viewing a List of Favorite Secure Cases

When you access secure cases in Case Notebook, 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 Case Notebook.

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

1. Access secure cases. The Open Case dialog box is displayed with a list of the cases to which you are assigned (Figure 7-6).

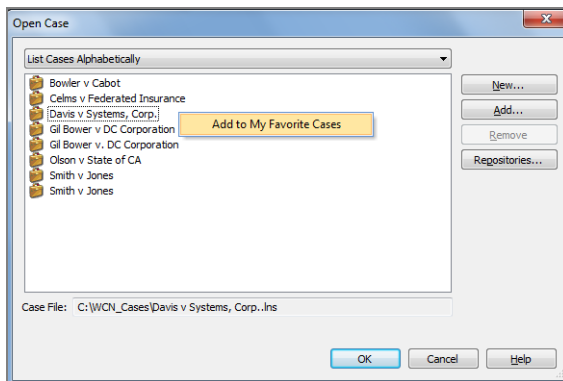


Figure 7-6. Open Case dialog box

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. In the list at the top of the dialog box, click **List My Favorite Cases**. Your list of favorite cases is displayed (Figure 7-7).

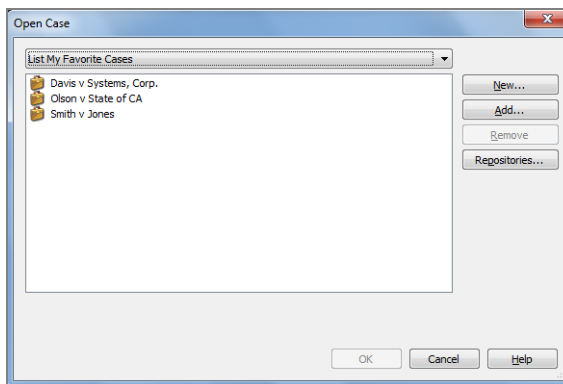


Figure 7-7. List of favorite cases

Replicating Cases Offline and to the Network

REPLICATING A CASE OFFLINE

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

1. On the **File** menu, click **Replicate Case Offline**. The Case Data dialog box is displayed (Figure 7-8).

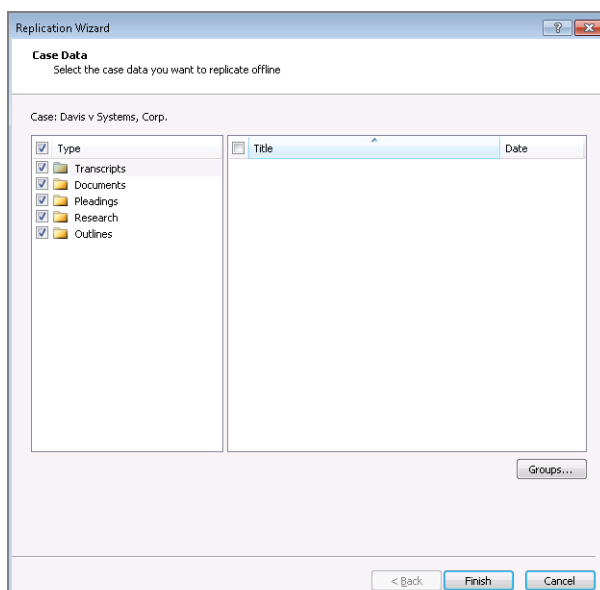


Figure 7-8. Case Data dialog box

2. By default, all document types and data 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 groups to organize data into folders under data categories in the left pane.
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. On the **File** menu, click **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 Case Notebook and select the cases you want to replicate offline. To replicate multiple cases offline, complete these steps:

1. On the **Tools** menu, click **Options**. The Options dialog box is displayed.
2. On the Confirmation tab, select the **Replicate offline on closing Westlaw Case Notebook** check, then click **OK**.
3. Close Case Notebook. The Cases dialog box is displayed (Figure 7-9).

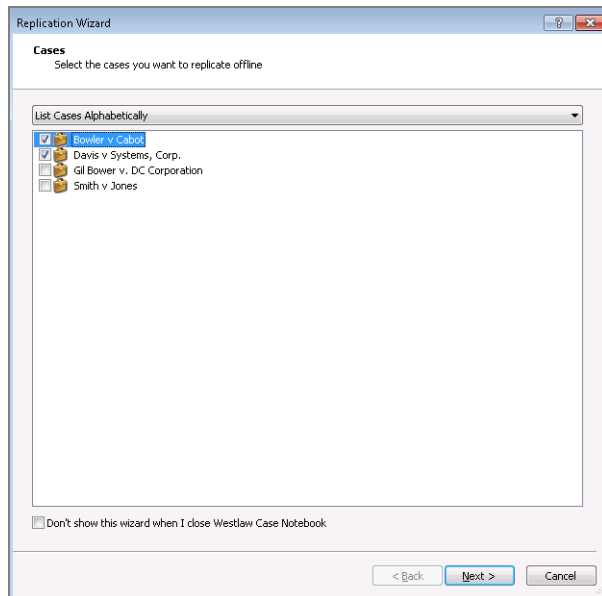


Figure 7-9. Cases dialog box

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 Case Data dialog box for the first case you selected is displayed.
6. By default, all document types and data 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**.
8. Click **Next**. If you selected more than one case, the 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**. Case Notebook is closed.

REPLICATING MULTIPLE CASES TO THE NETWORK

1. If you replicated cases offline, the next time you access Case Notebook, the Offline Cases dialog box is displayed (Figure 7-10).

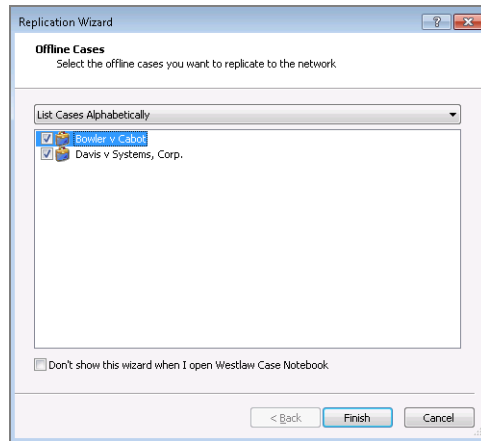


Figure 7-10. Offline Cases dialog box

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.

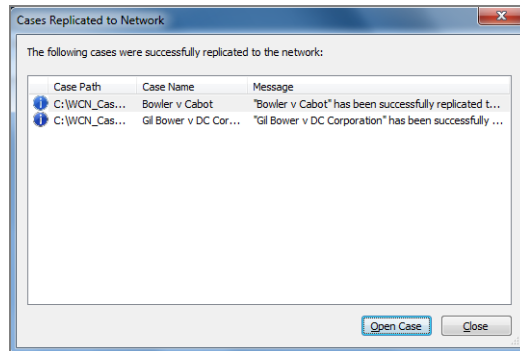


Figure 7-11. Cases Replicated to Network dialog box

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

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

1. On the **Tools** menu, click **Options**. The Options dialog box is displayed (Figure 7-12).

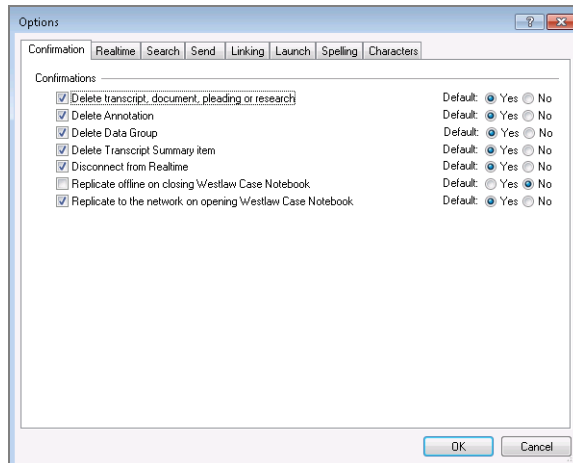


Figure 7-12. Options dialog box

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

8 LiveNote Admin Tool

The LiveNote Admin Tool is a command line tool that allows you to schedule an automatic updating of groups and users in the Case Notebook Repository from Active Directory. You can also specify user settings and assign Case Notebook seats. To use the Admin Tool, you create a batch file and then use Microsoft Windows Scheduled Tasks to implement it.

Creating a Batch File

You can create a batch file using any text editor, e.g., Microsoft Notepad. Then save the batch file with a .bat extension. Below are the switches used in a batch file for the Admin Tool.

- username/password – username and password for the Case Notebook administrator.
- /SERVER:hostname[:port] – name and port for the Case Notebook Repository. If this parameter is not specified, Admin Tool will look for a default repository in the user section of the registry.
- /USERS – imports all users in the Active Directory.
- /USERGROUP:group1[group2].... – imports all users in the specified group. Also, a group will be created in the repository that corresponds to the Active Directory group.
- /DEFAULTPASS:pw – specifies the default password assigned to each user. If the repository is configured to authenticate users using Active Directory, this parameter will be ignored.
- /USERTYPE:ExternalUser|ReaderUser|AuthorUser|EditorUser|PowerUser|CaseManager – assigns a user type to each user.
- /ADMINPRIV – assigns administrator privileges to each user.
- /REPLICATEPRIV – assigns replication privileges to each user.
- /POWEREDITORPRIV – assigns power editor privileges to each user.
- /LNSEAT – allocates a LiveNote seat to a user if a seat is available.
- /LNRASWEBSEAT – allocates RAS Web seat to a user if seat is available.
- /d – disables user in repository when Active Directory is updated if user is disabled in Active Directory.
- /c – imports all user names from Active Directory in lower case; users must use all lower case when logging on.

SAMPLE BATCH FILE

```
@ECHO OFF
REM Changes the current directory to the directory where the Admin Tool is located,
REM runs AdminTool.exe, logs in with the administrator's username and password,
REM imports an Active Directory group called "Sales," and
REM assigns a Case Notebook seat to all users in the group.
CD C:\Program Files\West LiveNote\West LiveNote Administration
ADMIN TOOL user1/password1 /USERGROUP:Sales /LNSEAT
END BATCH FILE
```

Using Scheduled Tasks

To implement the batch file using Scheduled Tasks, complete these steps:

1. On the **Start** menu, click **Control Panel**. The Control Panel window is displayed.
2. Double-click **Scheduled Tasks**. The Scheduled Tasks window is displayed.
3. Double-click **Add Scheduled Task**. The Scheduled Task Wizard is displayed.
4. Click **Next**.
5. Select the batch file you created and click **Next**.
6. Type a name for the task in the text box and select the frequency at which you want to update the repository. Click **Next**.
7. If you selected **Daily**, **Weekly**, **Monthly**, or **One time only** as the frequency in Step 6, select the day and time you want the update to start. Click **Next**.
8. In the **Enter the user name** box, type your network username.
9. In the **Enter the password** and **Confirm password** boxes, type your network password.
10. Click **Next**.
11. Select the **Open advanced properties for this task when I click Finish** check box, if desired. Click **Finish**. The Scheduled Tasks window is redisplayed.
12. Click the **Close** button in the upper-right corner of the window.

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