

# West Case Notebook User Guide

Version 1.0 and Version 1.1

February 2009



# West Case Notebook™ User Guide

Version 1.0 and Version 1.1

**February 2009**

# West Customer Service

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If you have general or technical questions about West Case Notebook, call West Case Notebook Customer Technical Support at 1-800-290-9378 or send an e-mail message to [west.livenote@thomson.com](mailto:west.livenote@thomson.com).

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To browse and order free West Case Notebook reference materials, visit [west.thomson.com/support/user-guide/livenote-case-notebook.aspx](http://west.thomson.com/support/user-guide/livenote-case-notebook.aspx). West Case Notebook also contains valuable online Help.

## **About This Guide**

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

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# Introduction

West Case Notebook is an electronic organizer and deposition tool for saving and working with important documents, research, and transcripts. With West Case Notebook you can

- track key facts and their related issues
- track the parties involved in the litigation
- import and convert key documents to text searchable formats using optical character recognition (OCR) technology
- send research documents from Westlaw to the case file
- check KeyCite status
- build issues databases by creating categories and highlighting text
- summarize issues by running reports
- copy text from a Westlaw document and paste the text along with the citation into a word-processing document
- connect to a deposition transcript in real time

## System Requirements

You will need the following to operate West Case Notebook, West LiveNote Administration, and West LiveNote Repository:

### West Case Notebook

If you intend to view video with West Case Notebook, use the recommended configurations.

- IBM PC or compatible computer with Pentium 4 processor
- Windows Vista or Microsoft Windows XP Service Pack 2
- 1 GB of RAM (2 GB recommended) for Microsoft Windows XP
- 1 GB of RAM (2 GB recommended) for Windows Vista
- 10 GB of available hard disk space (100 GB recommended)
- Microsoft Internet Explorer 6 or later
- Windows Media Player 9 or later
- one free serial port for Realtime connection

**Note:** If you do not have a free serial port, you can connect to Realtime with a serial adapter connected to a USB port or through the Internet with LiveNote Stream. For more information on LiveNote Stream, see “Using LiveNote Stream” on page 55.

### West LiveNote Administration

- IBM PC or compatible computer with Pentium 4 processor
- Windows Vista, Microsoft Windows XP Service Pack 2, or Windows Server 2003
- 1 GB of RAM (2 GB recommended) for Microsoft Windows XP
- 1 GB of RAM (2 GB recommended) for Windows Vista
- 10 GB of available hard disk space

### West LiveNote Repository

- IBM PC or compatible computer with Pentium 4 processor
- Windows Server 2003
- 1 GB of RAM (2 GB recommended)
- 10 GB of available hard disk space

### File Types for Importing Transcripts

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

- E-Transcript (PTX or EXE) files
- ASCII (text only) files
- Portable Transcript (PTF) files
- LiveNote Evidence Format (LEF) files
- Publisher Bundle (bundle.xml) files
- Extensible Markup Language (XML) files
- CT Summation (TRN) files
- Timaro Technologies Post-Production Time-Stamp (PTS) files

### File Types for Importing Documents and Pleadings

You can import the following types of files for documents and pleadings into West Case Notebook:

- Images
  - TIF/TIFF (Tagged Image File Format)
  - JPE/JPG/JPEG (Joint Photographic Experts Group)
  - BMP (Bitmap)
  - GIF (Graphic Interchange Format)
  - JFX
- PDF (Portable Document Format)
- MSG (Microsoft Outlook file)
- DOC/DOCX (Microsoft Word file)
- WP/WPD (Corel WordPerfect file)
- PEX (LiveNote document file)
- HTM/HTML (Hypertext Markup Language)
- TXT (plain text file)
- RTF (Rich Text Format)
- Document review load files
  - CaseCentral ASCII Load File (TXT)
  - Concordance ASCII Load File (DAT)
  - IPRO ASCII Load File (LFP)
  - Lextranet ASCII Load File (TXT)
  - Opticon ASCII Load File (OPT)
  - Summation ASCII Load File (TXT)

**Note:** If your load file is not one of the types listed, you still may be able to import it using the Custom options or by using conversion tools available for free on the Internet.

An administrator can designate who can access the case file documents.

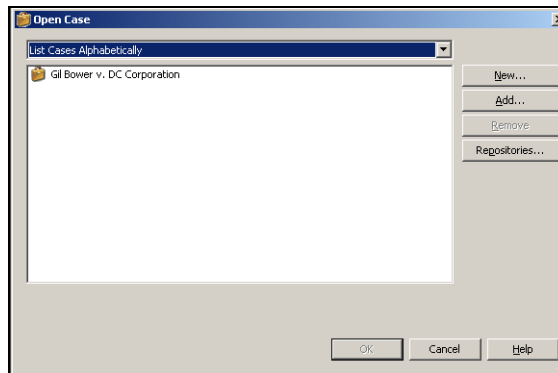
# Managing Cases

## Creating a New Local Case

Cases in West Case Notebook 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.

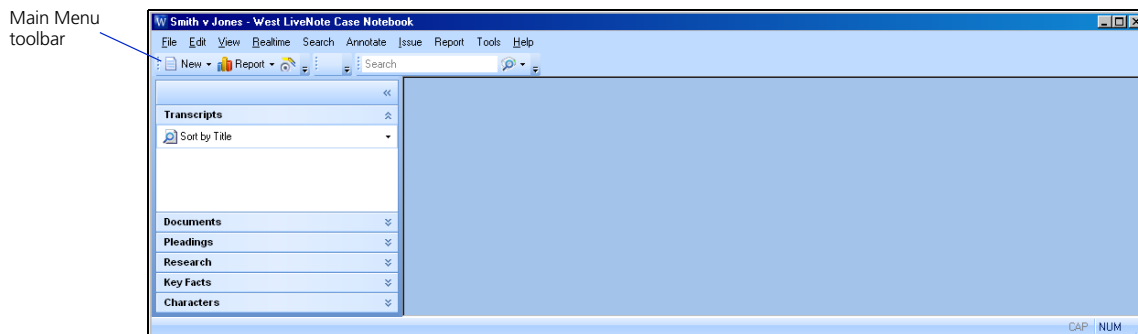
To create a new case, follow these steps:

1. Access West Case Notebook to display the 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 Jones**, in the *Name* text box.
5. Click **OK**.

The case window, which lists all the documents for the case, is displayed.



## Creating a New Case from an Open Case

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

## Managing Cases

1. Click the **New** arrow on the Main Menu toolbar and choose **Case** from the menu. The Save As dialog box is displayed.
2. Complete steps 2 through 4 above.

## 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* dialog box.
4. Click **Save**. The message *Would you like to add the new case to your case list?* 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 Case Notebook version 1.1. 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 Case Notebook version 1.1 cases, see Appendix B: Converting RealLegal Binder Cases to West Case Notebook Cases.

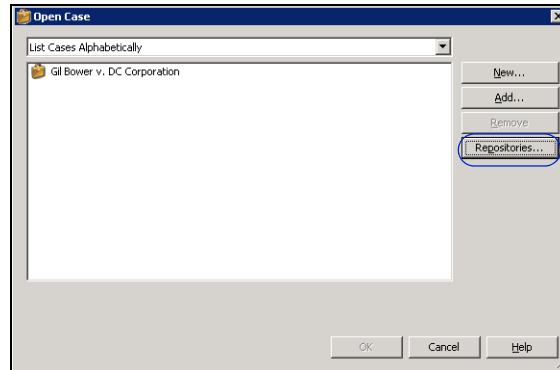
## Accessing Secure Cases

### Notes

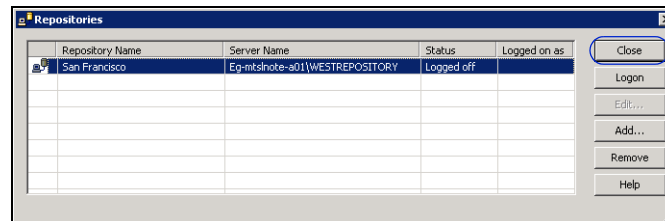
- If you are working on a secure case with other users, all users must use the same version of West Case Notebook. For example, if a secure case is upgraded to West Case Notebook version 1.1, all users working on the case must use West Case Notebook version 1.1.
- If you are working in a West Case Notebook version 1.1 case, then revert to using West Case Notebook version 1, 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 secured case, complete these steps:

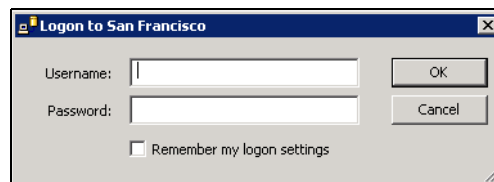
1. Access West Case Notebook. Or in an open case, choose **Open Case** from the File menu. The Open Case dialog box is displayed.



2. Click **Repositories** in the Open Case dialog box. The Repositories dialog box is displayed.

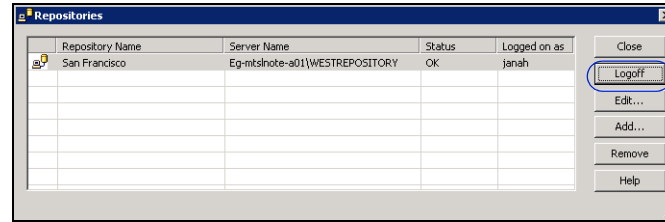


3. Select the repository that you want to log on to and click **Logon**. The Logon to [Repository Name] dialog box is displayed.

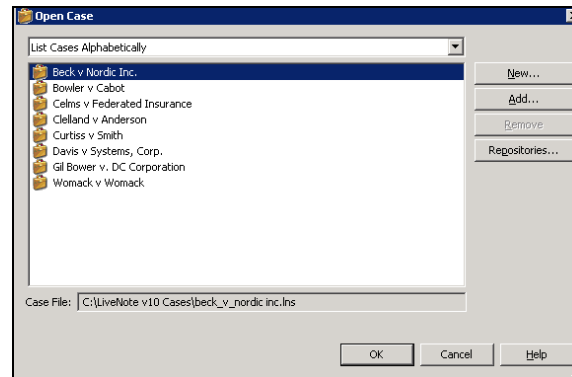


4. Type your username and the password that is assigned to you in West LiveNote Administration in the *Username* and *Password* text boxes.
5. Select the **Remember my logon settings** check box if you want West Case Notebook to remember your username and password.
6. Click **OK**. The Repositories dialog box is redisplayed.

## Managing Cases



7. Click Close. The Open Case dialog box is redisplayed with a list of the cases to which you are assigned.



**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 with a key indicates a secure case that was replicated offline and is currently being accessed locally.

To view cases only secure cases, select **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.

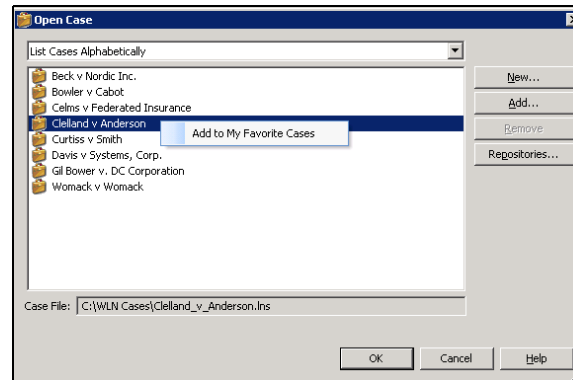
8. Select your case and click **OK**.

## Viewing a List of Favorite Secure Cases

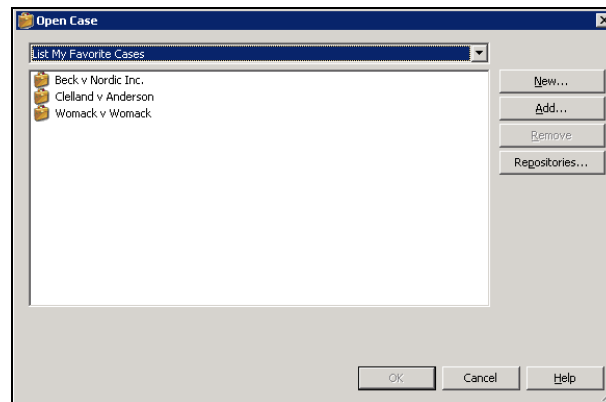
When you access secure cases in West Case Notebook, all of the cases to which you are assigned are listed in the Open Case dialog box. You can add one or more of these cases to your list of favorite cases, then view only those cases when you access West Case Notebook.

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.



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. Select **List My Favorite Cases** from the drop-down list at the top of the dialog box. Your list of favorite cases is displayed.



## 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 West Case Notebook. To replicate a secure case offline, complete these steps:

1. From the File menu, choose **Replicate Case Offline**. The Cases Replicated to Offline dialog box is displayed, informing you that the case was successfully replicated to offline.
2. 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

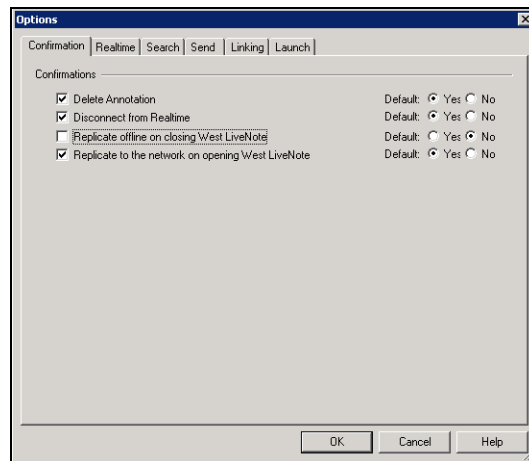
To replicate a case to the network, complete these steps:

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.

## Changing Replication Options

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

1. From the Tools menu, choose **Options**. The Options dialog box is displayed.



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**.

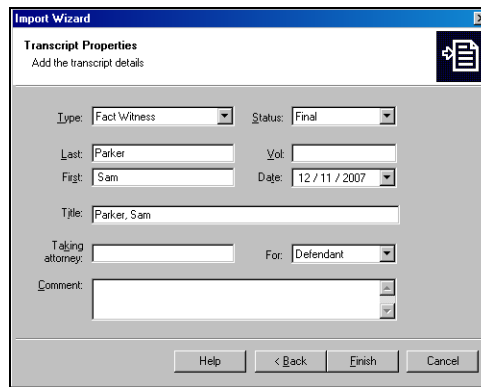


# Managing Transcripts

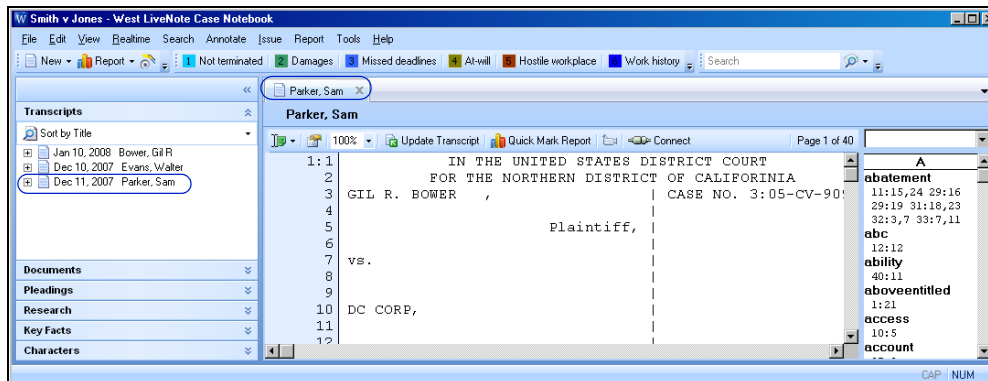
## Importing a Transcript


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. Select 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.



5. Type a comment in the *Comment* text box, if desired.
6. 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 text of the transcript is displayed in the right pane and listed under *Transcripts* in the left pane.




Note: If you see  next to the transcript, it indicates 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.

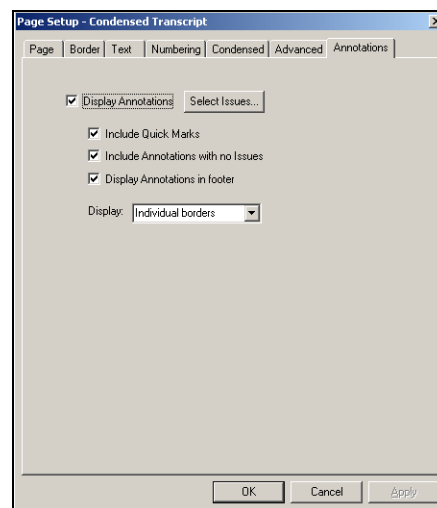
## Deleting a Transcript

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

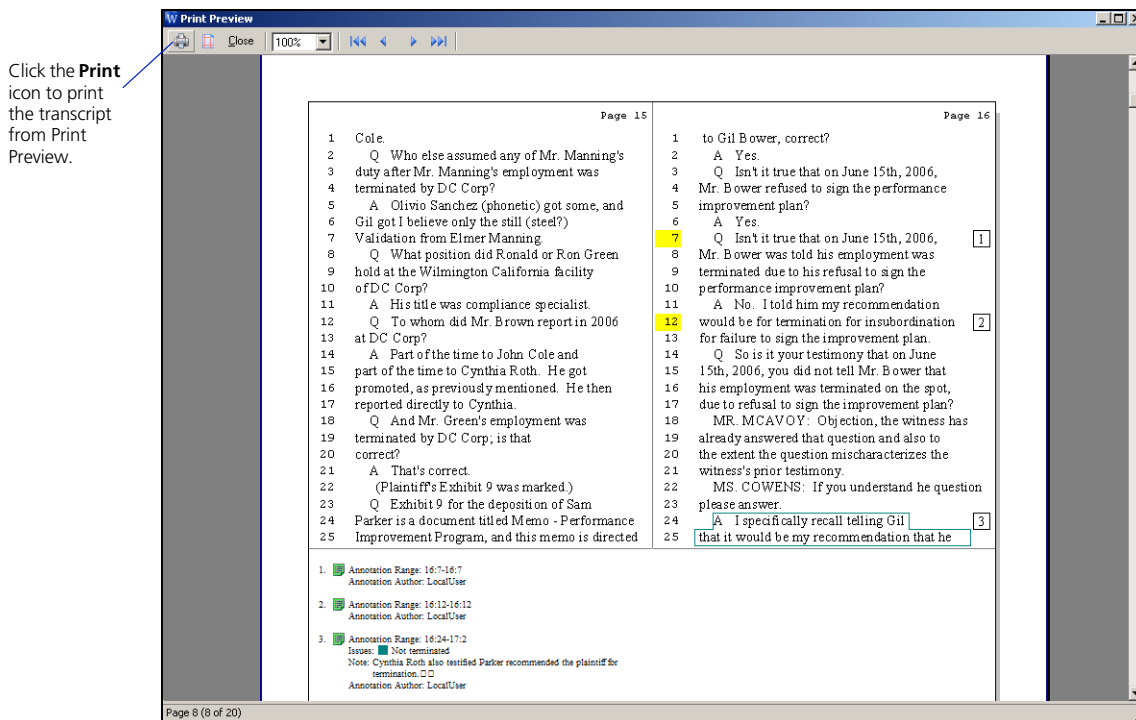
You can display annotations, Quick Marks, and Issue Marks in printed transcripts. For condensed transcripts, you can also print annotations, including notes and author information, in the footer of the document. To print a transcript with annotations in the footer of the document, complete these steps:

1. Open the transcript you want to print.
2. Choose **Page Setup, Transcript, Condensed** from the File menu. The Page Setup–Condensed Transcript dialog box is displayed.



3. Click the **Annotations** tab.
4. Select the **Display Annotations** check box.

5. To include or remove 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 33.
6. Select or clear the check boxes next to the issues you want to include or remove and click **OK**. The Page Setup–Condensed Transcript dialog box is redisplayed.
7. Select the **Include Quick Marks** check box, if desired.
8. Select the **Include Annotations with no Issues** check box, if desired.
9. Select the **Display Annotations in footer** check box.
10. Select how you want the annotations displayed in the transcript text from the *Display* drop-down list.
11. Click **OK**.
12. To view the transcript and its annotations before printing, choose **Print Preview, Transcript, Condensed** from the File menu. The transcript with its annotations is displayed.



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



# Updating Transcripts

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


- E-Transcript files (PTX or EXE)—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 Case Notebook 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

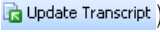
To update an transcript, you must first assign draft status to the transcript. To assign draft status to a transcript, complete these steps:

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

## Updating with an E-Transcript File (PTX or EXE)

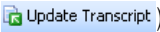
1. Click the **Update Transcript** button () on the toolbar above a displayed transcript. The Update Transcript–Transcript File dialog box is displayed.
2. Click **Browse** to display the Browse for Transcript Files dialog box.
3. Select the PTX file that was sent to you and click **Open**. The Update 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 () on the toolbar above a displayed transcript. 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 displayed transcript. 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 ( Update Transcript) on the toolbar above a displayed transcript. 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**.





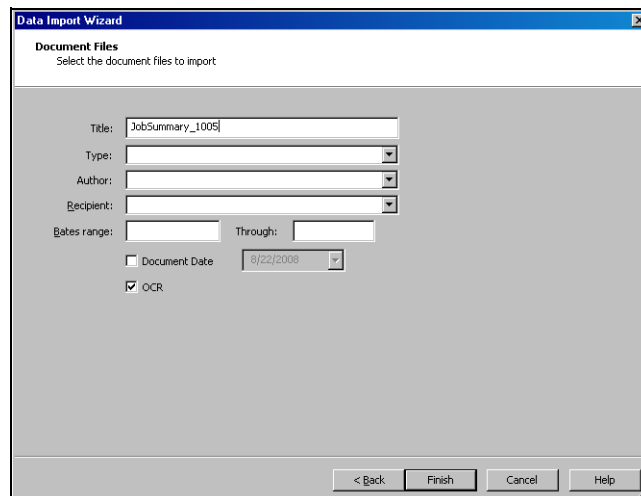
# Managing Documents

You can add key documents to West Case Notebook to quickly categorize and search.

## Importing a Document

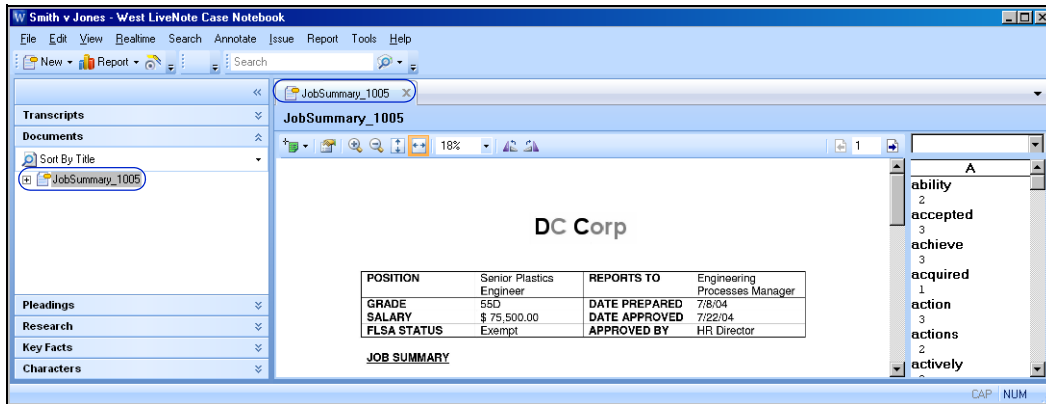
To import a document, complete these steps:

1. Click the **New** arrow on the Main Menu toolbar and choose **Document (from File)** from the menu. The Data Import Wizard–Document Files dialog box is displayed.
2. Click **Add** to display the Open dialog box.
3. Select your document and click **Open**. The Data Import Wizard–Document Files dialog box is redisplayed.
4. Click **Next**. The Data Import Wizard–Document Files dialog box is displayed.



5. Type a name for the document, e.g., **JobSummary\_1005**, in the *Title* text box.
6. Select a type from the *Type* drop-down list, if desired.
7. Type the author's name in the *Author* text box or select the name from the drop-down list, if desired.
8. Type the recipient's name in the *Recipient* text box or select the name from the drop-down list, if desired.
9. Type a number in the *Bates range* and *Through* text boxes, if desired.
10. Select the **Document Date** check box, if desired. When you select this check box, the current day's date is entered in the text box automatically. Click the arrow to select another date.
11. The **OCR** check box is automatically selected if the document is an image file or PDF file.

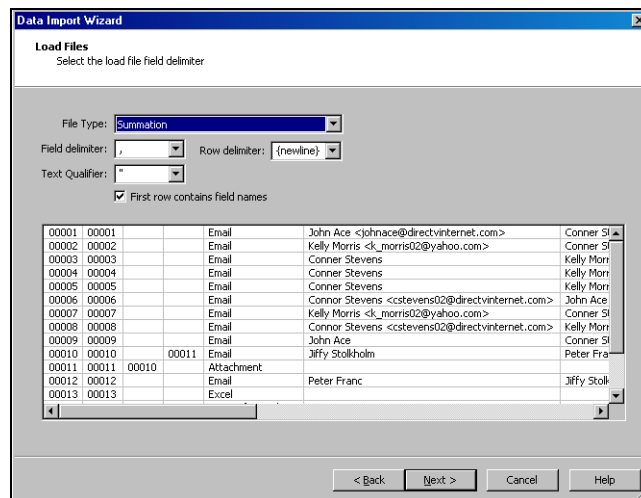
12. Click **Finish**. The document is displayed in the right pane and listed under *Documents* in the left pane.



### Importing Load Files

To import a load file, complete these steps:

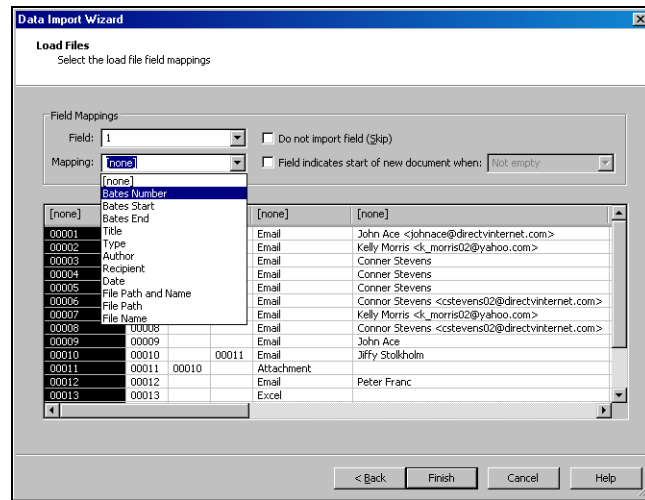
1. Click the **New** arrow on the Main Menu toolbar and choose **Document (from File)** from the menu. The Data Import Wizard–Document Files dialog box is displayed.
2. Click **Load File** to display the Open dialog box.
3. Select your document and click **Open**. The Data Import Wizard–Document Files dialog box is redisplayed.
4. Click **Next**. The Data Import Wizard–Load Files: Select the Load File Field Delimiter dialog box is displayed.



5. Select the file type for the load file from the *File Type* drop-down list. The field delimiter, row delimiter, and text qualifier are automatically entered for you. The *First row contains field names* check box is selected, if appropriate.

**Note:** If your load file is not listed in the *File Type* drop-down list, select **Custom** from the list. Then select the appropriate field delimiter, row delimiter, and text qualifier from the drop-down lists.

6. Click **Next**. The Data Import Wizard–Load Files: Select the Load File Field Mappings dialog box is displayed.



7. Assign a title to each field in the file by mapping the field. For example, to map the first field, which contains Bates Numbers, in the figure above, select the field by clicking **[none]** at the top of the first column. Then select **Bates Number** from the *Mapping* drop-down list. Repeat this process for each field you want to map.
- Note:** You must map the File Path and Name field to import the file. If the file path and file name are not in the same field, map the File Path and File Name fields separately.
8. If you do not want to import a field, select the field and then select the **Do not import field (Skip)** check box.
9. If a field indicates that the load file contains a row for each page of a document, select the field. Then select the **Field indicates start of a new document when** check box and select an option from the drop-down list.
10. Click **Finish**. The documents are listed under *Documents* in the left pane.

## Opening an Existing Document


To open a document, complete these steps:

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

## Deleting a Document

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

## Closing a Document

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



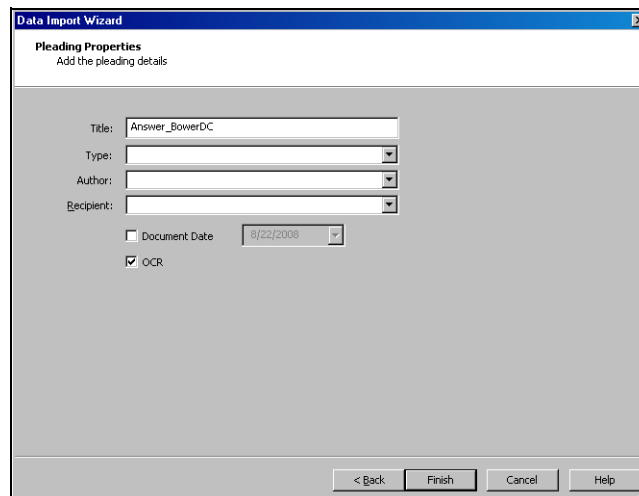
# Managing Pleadings

West Case Notebook allows you to add pleadings to categorize and search.

## Importing a Pleading

To import a pleading, complete these steps:

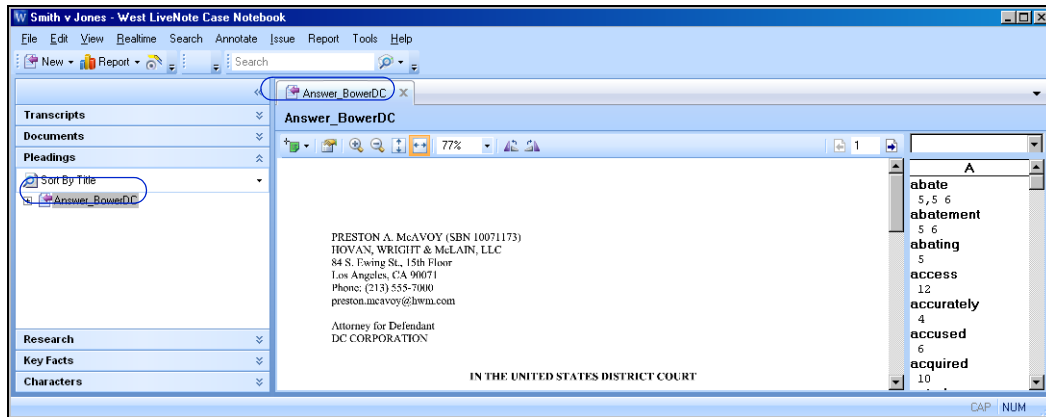
1. Click the **New** arrow on the Main Menu toolbar and choose **Pleading (from File)** from the menu. The Data Import Wizard–Pleading Files dialog box is displayed.
2. Click **Add** to display the Open dialog box.
3. Select your pleading and click **Open**. The Data Import Wizard–Pleading Files dialog box is redisplayed.
4. Click **Next**. The Data Import Wizard–Pleading Properties dialog box is displayed.



5. Type a name for the pleading, e.g., **Answer\_BowerDC**, in the *Title* text box.
6. Select a type from the *Type* drop-down list, if desired.
7. Type the author's name in the *Author* text box or select the name from the drop-down list, if desired.
8. Type the recipient's name in the *Recipient* text box or select the name from the drop-down list, if desired.
9. Select the **Document Date** check box, if desired. When you select this check box, the current day's date is entered in the text box automatically. Click the arrow to select another date.
10. The **OCR** check box is automatically selected if the pleading is an image file or PDF file.

## Managing Pleadings

11. Click **Finish**. The pleading is displayed in the right pane and listed under *Pleadings* in the left pane.



## Opening an Existing Pleading


To open a pleading, complete these steps:

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

## Deleting a Pleading

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

## Closing a Pleading



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

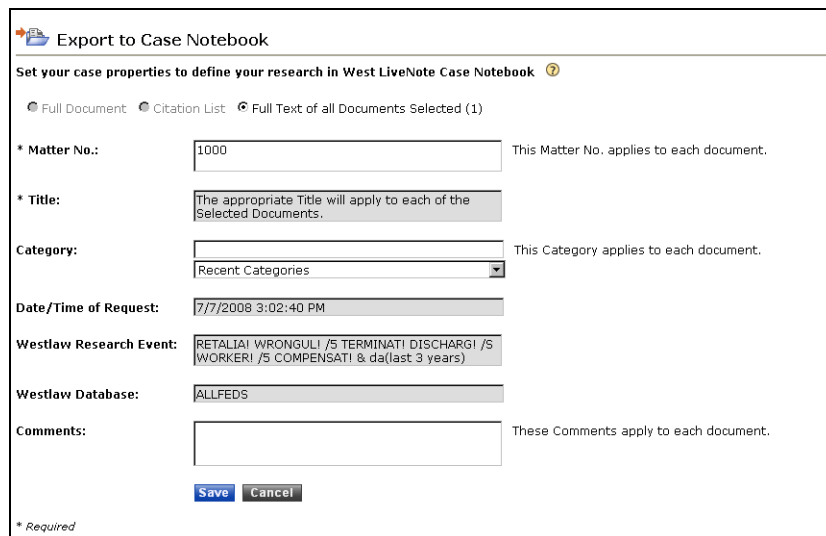
# Managing Research

If you are conducting research on Westlaw, you can deliver your Westlaw search result to West Case Notebook. From West Case Notebook, you can quickly update KeyCite information and access Westlaw to conduct further research. For more information on using Westlaw, download a free copy of *Using Westlaw* at [west.thomson.com/westlaw/guides](http://west.thomson.com/westlaw/guides).

## Delivering a Westlaw Search Result to West Case Notebook

After conducting your research on Westlaw, you can deliver the result list or selected documents to West Case Notebook. To deliver the result list or selected documents to West Case Notebook, complete these steps:

1. To deliver the result list, click the **Export to Case Notebook** icon (  ) in the upper-right corner. To deliver specific documents in the result list, select the check box next to each document you want to deliver and then click the **Export to Case Notebook** icon (  ) in the upper-right corner. The Export to Case Notebook dialog box is displayed.



**Export to Case Notebook**

Set your case properties to define your research in West LiveNote Case Notebook

Full Document  Citation List  Full Text of all Documents Selected (1)

\* **Matter No.:**  This Matter No. applies to each document.

\* **Title:**

**Category:**  This Category applies to each document.

**Date/Time of Request:**

**Westlaw Research Event:**

**Westlaw Database:**

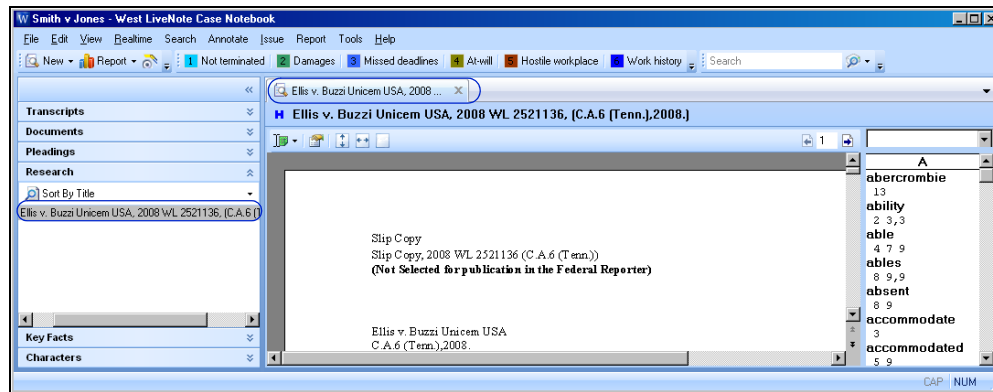
**Comments:**  These Comments apply to each document.

\* Required

2. Make certain the matter number corresponds with the client-matter number for the case in West Case Notebook. (To view the client-matter number for the case, choose **Case Properties** from the File menu in West Case Notebook.)
3. Select an issue from the *Category* drop-down list, if desired.
4. Type a comment in the *Comments* text box, if desired.
5. Click **Save**. The Download Confirmation dialog box is displayed.
6. Click **Complete Download**. The File Download dialog box is displayed.
7. Click **Open**. The Research Files dialog box is displayed.

## Managing Research

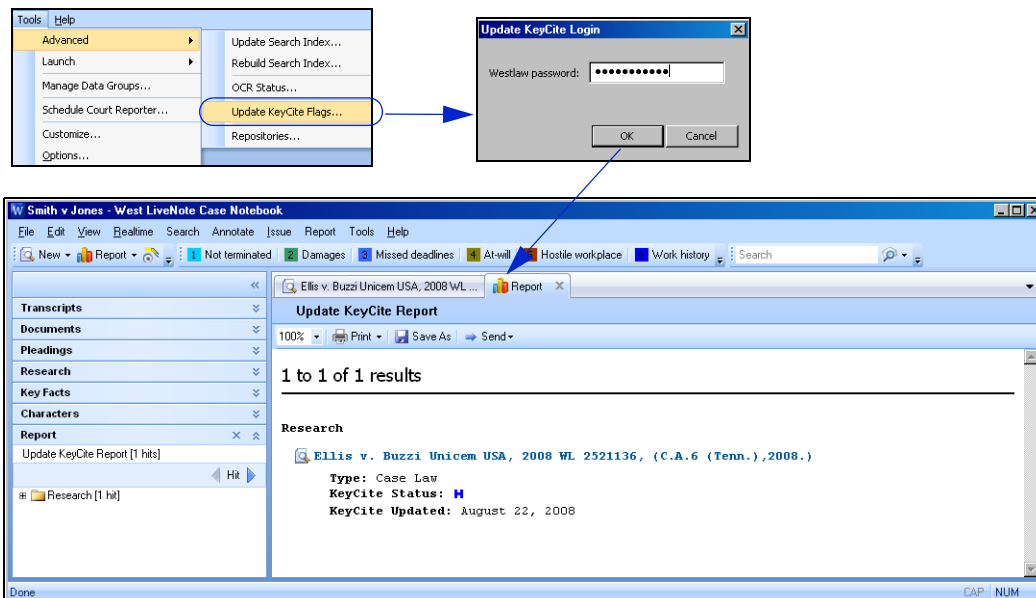
- Click **Finish**. The Westlaw result list or documents you selected are displayed in the right pane and listed under *Research* in the left pane.



## Updating KeyCite Information

You can quickly update KeyCite information for a Westlaw document in West Case Notebook. To update KeyCite information, complete these steps:

- Choose **Advanced, Update KeyCite Flags** from the Tools menu in West Case Notebook. The Update KeyCite Login dialog box is displayed.
- Type your Westlaw password in the text box and click **OK**.
- The Update KeyCite Report is displayed in the right pane and listed under *Report* in the left pane.



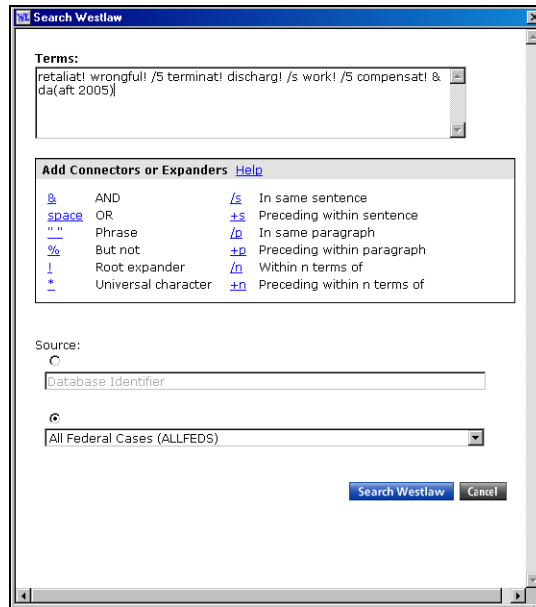
**Note:** Research items with a changed status will be highlighted with yellow.



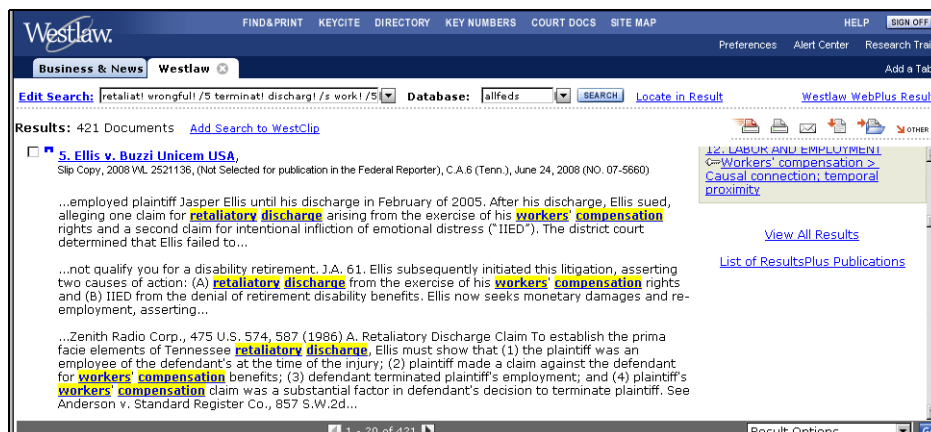
## Searching for Documents

To search for documents on Westlaw, complete these steps:

1. From the Search menu in West Case Notebook, choose **Westlaw Search**. The Search Westlaw dialog box is displayed.



2. Type your Terms and Connectors query, e.g., **retaliat! wrongful! /5 terminat! discharg! /s work! /5 compensat! & da(aft 2005)**, in the *Terms* text box.
3. Under *Source*, type a database identifier in the text box or select a database, e.g., **All Federal Cases (ALLFEDS)** from the drop-down list.
4. Click **Search Westlaw**. The Westlaw sign-on page is displayed.
5. Type your Westlaw password and client identifier in the text boxes.
6. Click **Sign On**. The result list for your search is displayed.

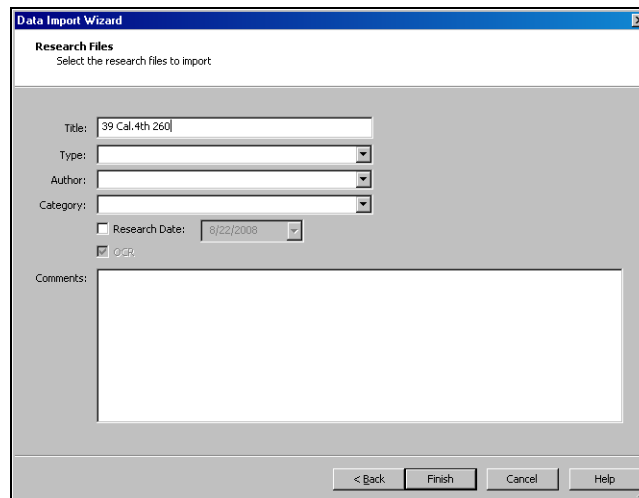


## Importing Research Documents

You can import other research documents into West Case Notebook.

To import a research document, complete these steps:

1. Click the **New** arrow on the Main Menu toolbar and choose **Research (from File)** from the menu. The Data Import Wizard–Research Files dialog box is displayed.
2. Click **Add** to display the Open dialog box.
3. Select your research document and click **Open**. The Data Import Wizard–Research Files dialog box is redisplayed.
4. Click **Next**. The Data Import Wizard–Research Files dialog box is displayed.



5. Type a name for the research document, e.g., **39 Cal.4th 260**, in the Title text box.
6. Select a type from the *Type* drop-down list, if desired.
7. Select an author from the *Author* drop-down list, if desired.
8. Select a category from the *Category* drop-down list, if desired.
9. Select the **Research Date** check box, if desired. When you select this check box, the current day's date is entered in the text box automatically. Click the arrow to select another date.
10. The **OCR** check box is automatically selected if the document is an image file or PDF.
11. Click **Finish**. The research document is displayed in the right pane and listed under Research in the left pane.

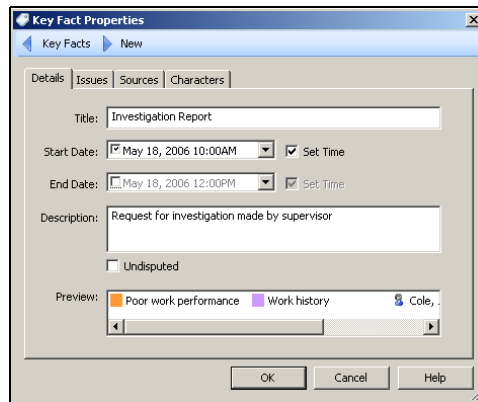
# Managing Key Facts

West Case Notebook allows you to create key facts to quickly and easily organize, view, and share the most important facts in the litigation.

## Creating a Key Fact

To create a key fact, complete these steps:

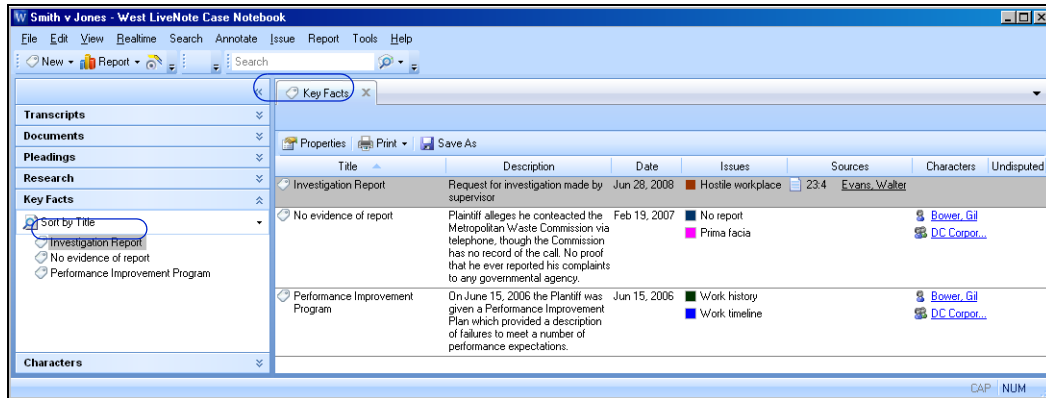
1. Click the **New** arrow on the Main Menu toolbar and choose **Key Fact** from the menu. The Key Fact Properties dialog box is displayed.



2. Type a name for the key fact, e.g., **Investigation Report**, in the *Title* text box.
3. Select the **Start Date** check box, if desired. If you have not previously created any key facts, the current day's date is entered in the text box automatically. Otherwise, the start date of the last key fact you created is entered. Type a new start date or click the arrow to select another start date.
4. Select the **Set Time** check box, if desired. If you have not previously created any key facts, **12:00PM** is entered in the text box automatically. Otherwise, the start time of the last key fact you created is entered. Type a different start time, if desired.
5. Select the **End Date** check box, if desired. If you have not previously created any key facts, the current day's date is entered in the text box automatically. Otherwise, the end date of the last key fact you created is entered. Type a new end date or click the arrow to select another end date.
6. Select the **Set Time** check box, if desired. If you have not previously created any key facts, **12:00PM** is entered in the text box automatically. Otherwise, the end time of the last key fact you created is entered. Type a different end time, if desired.
7. Type a description, e.g., **Request for investigation made by supervisor**, in the *Description* text box.
8. Select the **Undisputed** check box, if desired.
9. Click the **Issues** tab and select one or more issues, if desired. Issues will be listed on this tab only if they have previously been created. See "Working with Issues" on page 33.

## Managing Key Facts

- Click the **Sources** tab and select one or more sources, if desired. Sources will be listed on this tab only if annotations have previously been created. See “Working with Annotations” on page 35.
- Click the **Characters** tab and select one or more characters, if desired. Characters will be listed on this tab only if they have previously been created. See “Managing Characters” on page 31.
- Click **OK**. The key fact is displayed on the Key Facts tab in the right pane and listed under *Key Facts* in the left pane.




## Editing a Key Fact

To edit a key fact, right-click the key fact and choose **Properties** from the menu. The Key Fact Properties dialog box is displayed. Make the appropriate changes and click **OK**.

## Deleting a Key Fact

To delete a key fact, right-click the key fact and choose **Delete** from the menu. The message *Permanently delete the selected Key Fact?* is displayed. Click **Yes**.

## Closing the Key Facts Tab

To close the Key Facts tab so that it is no longer displayed in the right pane, click the **Close** button (  ) on the tab.

## Saving Key Facts As a West Case Timeline File

You can use West Case Timeline to create a chart of your key facts. To create a chart in West Case Timeline, you must first save your key facts as a West Case Timeline (TAB) file and then import the file into West Case Timeline. For more information on West Case Timeline, refer to *Using West Case Timeline*, which can be downloaded at [west.thomson.com/support/user-guide/livenote-case-notebook.aspx](http://west.thomson.com/support/user-guide/livenote-case-notebook.aspx).

To create a West Case Timeline file, complete these steps:

1. Choose **Save As, Key Facts** from the File menu. The Save As dialog box is displayed.
2. Select a location for the West Case Timeline file.
3. Type a file name in the *File name* text box.
4. Select **West Case Timeline (\*.tab)** from the *Save as type* drop-down list.
5. Click **Save**.



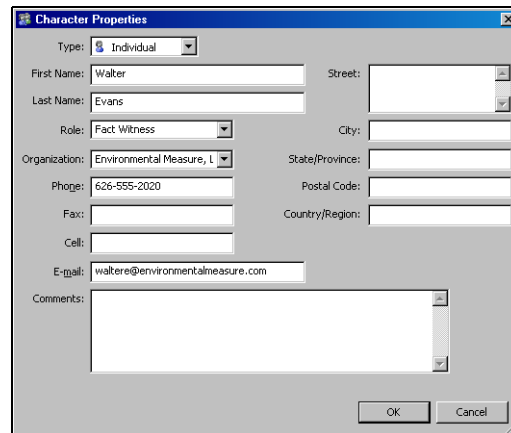
# Managing Characters

With West Case Notebook, you can easily keep track of all the characters in the litigation, such as parties, attorneys, experts, and witnesses, and their contact information.

## Creating a Character

To create a character, complete these steps:

1. Click the **New** arrow on the Main Menu toolbar and choose **Character** from the menu. The Character Properties dialog box is displayed.

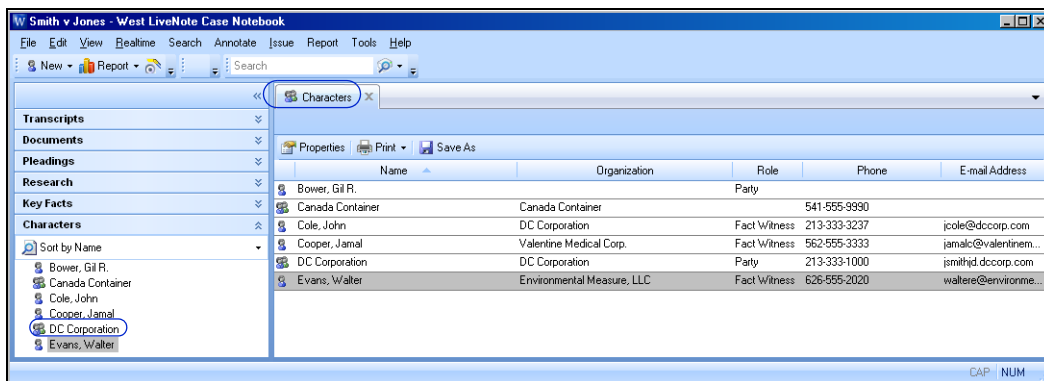


The Character Properties dialog box is shown with the following fields:

- Type: Individual (dropdown)
- First Name: Walter
- Last Name: Evans
- Role: Fact Witness (dropdown)
- Organization: Environmental Measure, L (dropdown)
- Phone: 626-555-2020
- Fax: (empty)
- Cell: (empty)
- E-mail: waltere@environmentalmeasure.com
- Comments: (empty text area)
- Street: (empty)
- City: (empty)
- State/Province: (empty)
- Postal Code: (empty)
- Country/Region: (empty)

Buttons: OK, Cancel

2. Fill in the text boxes as appropriate.
3. Click OK. The character is displayed on the Characters tab in the right pane and listed under *Characters* in the left pane.



## Managing Characters


### Editing a Character

To edit the information for a character, right-click the character and choose **Properties** from the menu. The Character Properties dialog box is displayed. Make the appropriate changes and click **OK**.

### Deleting a Character

To delete a character, right-click the character and choose **Delete** from the menu. The message *Permanently delete the selected Character?* is displayed. Click **Yes**.

### Closing the Characters Tab

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




# Working with Issues

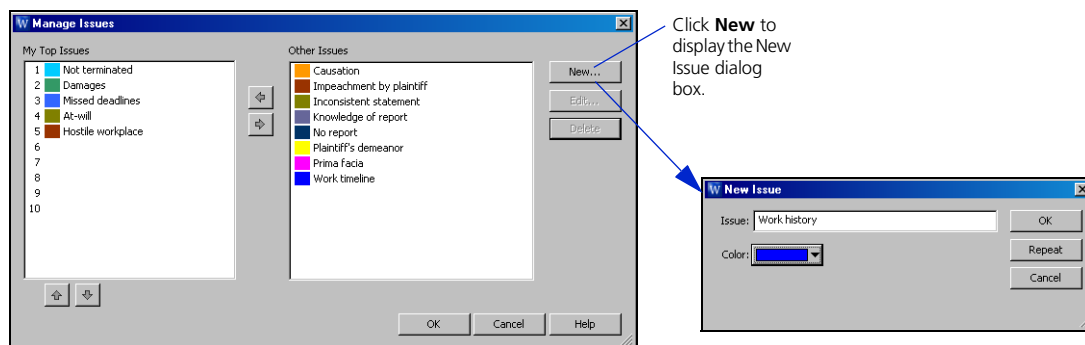
An issue is a type of annotation that relates to a particular subject. For more information on annotations, see “Working with Annotations” on page 35. Categorizing annotations in a case by issue makes it easy to retrieve all information on a specific subject when you need it. Issues are created for each 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.
2. Click **New** to display the New Issue dialog box.
3. Type the name of the issue, e.g., **Employment 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 *Other Issues* in the Manage Issues dialog box.



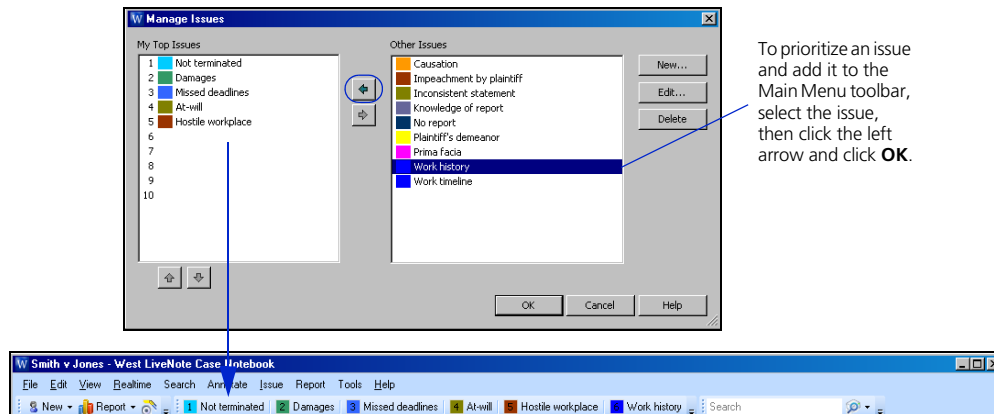
## Prioritizing Issues

To prioritize an 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 under *Other Issues*, e.g., **Work history**.
3. Click the left arrow to move the issue under *My Top Issues*.
4. Repeat steps 2 and 3 for each issue you want to prioritize and add to the Main Menu toolbar. You can prioritize up to 10 issues.

## Working with Issues

- To reprioritize an issue and change its order on the Main Menu toolbar, select the issue under *My Top Issues* and click the up arrow or down arrow.
- Click **OK** when you finish prioritizing the issues.



To prioritize an issue and add it to the Main Menu toolbar, select the issue, then click the left arrow and click **OK**.

## 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 from a file, complete these steps:

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

## Exporting Issues

To export issues from a file, complete these steps:



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

# Working with Annotations

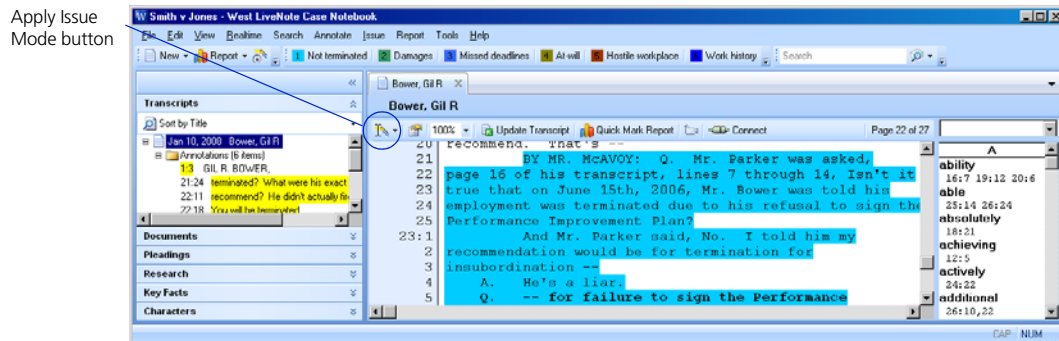
An annotation is a highlighted portion of the document text. It may be associated with an issue; a note (a comment associated with an annotation); or an attachment, e.g., a document or image.

## 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:

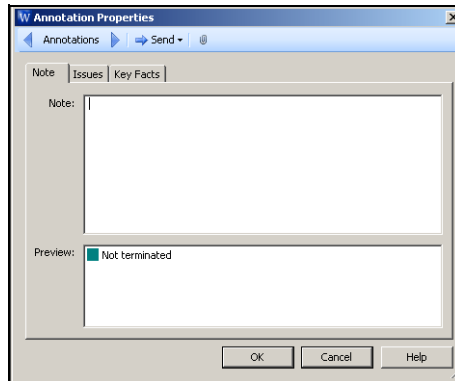
1. Make certain the **Apply Issue Mode** button (  ) is displayed on the toolbar above the document in the right pane. To display the Apply Issue Mode button, click the **Annotate Mode** button (  ) on the toolbar above the document and choose **Apply Issue Mode** from the menu. **Note:** The Annotate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



## 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, key fact, 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 document in the right pane. Then select the text in document you want to annotate. The Annotation Properties dialog box is displayed.



When you have finished associating a note, issue, key fact, or attachment with the annotation, click **OK**. If you did not select an issue, the text is highlighted with the default annotation color.

### 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 your 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. The list of prioritized issues (those that appear on the Main Menu toolbar) is displayed under *My Top Issues* and the list of non-prioritized issues is displayed under *Other 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 a Key Fact to an Annotation

To assign a key fact to an annotation, click the **Key Facts** tab in the Annotation Properties dialog box, select the key fact you want to assign to the annotation, and click **OK**.

### 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. 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.

### 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 Annotations and Video in Transcripts” on page 63.

## 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.

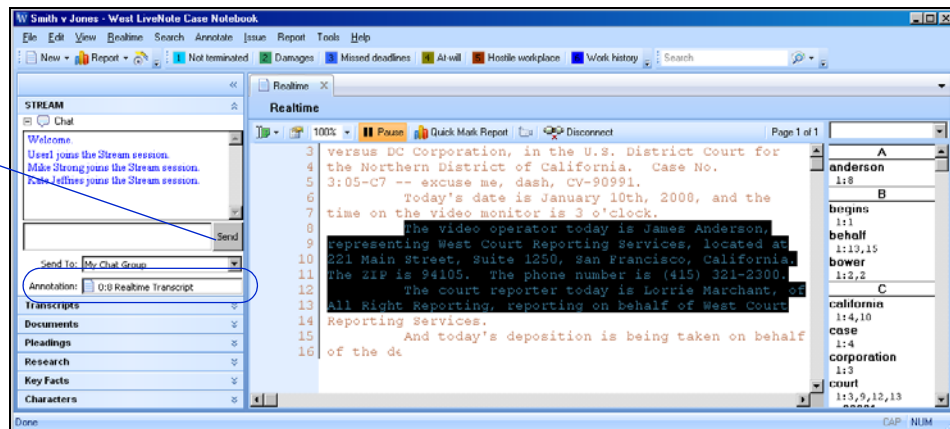
To transfer an annotation that is associated with a video to PowerPoint, see “Transferring Annotations to Microsoft PowerPoint” on page 64.

## 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 select an individual from the *Send To* drop-down list and click **Send**.
4. Repeat steps 1 through 3 for each annotation you want to send.

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



## 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.



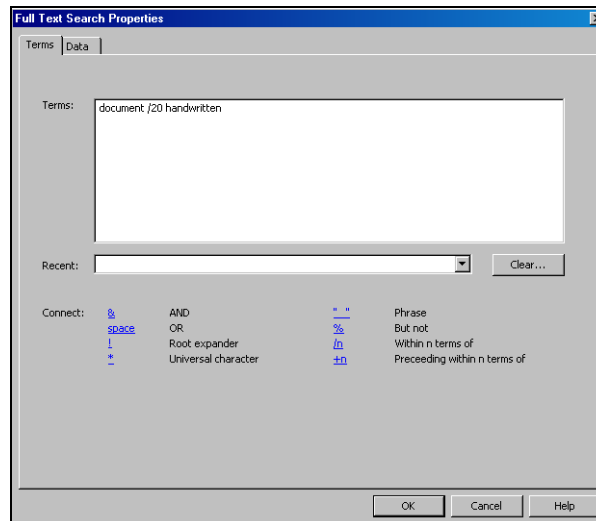
# Working with Full Text Search

The Full Text Search feature enables you to search one or more documents 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.

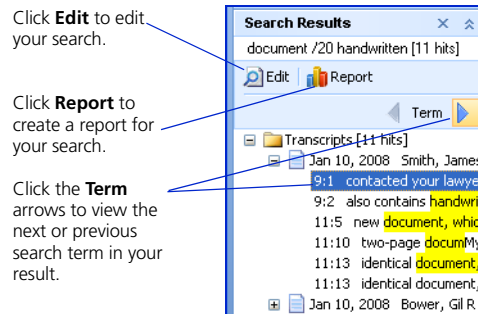


2. Formulate your search by choosing search terms significant to your issue and deciding which connectors to place between your terms. To retrieve variations of terms, use the root expander (!) and the universal character (\*). To retrieve a phrase, place quotations marks (“ ”) around the phrase.

For more information on creating a search, see “Formatting a Full Text Search” on page 40.

3. Type your search, e.g., **document /20 handwritten**, in the *Terms* text box. Or select a search from the *Recent* drop-down list.
4. Click the **Data** tab to display a all document types and data. 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.



## 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
<b>contribut!</b>	<i>contribute</i> <i>contributed</i> <i>contributor</i> <i>contributing</i> <i>contribution</i> <i>contributory</i>

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
<b>gr*w</b>	<i>grew</i> <i>grow</i>

**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 documents. For example,

Type	To search for documents that contain
<b>&amp;</b> (and)	both terms
a space ( <b>or</b> )	either term or both terms
<b>/n</b>	terms within <i>n</i> terms of each other (where <i>n</i> is a number)
<b>+n</b>	the first term preceding the second by <i>n</i> terms (where <i>n</i> is a number)
<b>“ ”</b>	terms appearing in the same order as in the quotation marks

Type	To exclude documents that contain
<b>% (but not)</b>	the terms following the percent symbol



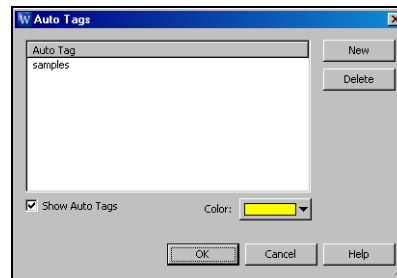
# Working with Auto Tags

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

## Creating Auto Tags

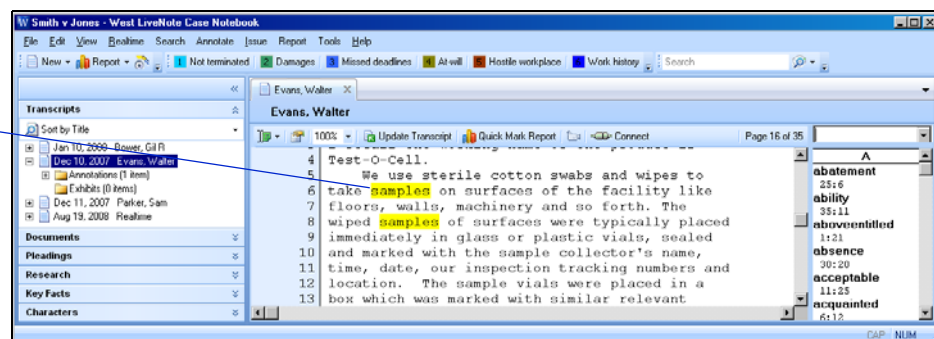
To create an Auto Tag, complete these steps:

1. Choose **Auto Tags** from the Annotate menu. The Auto Tags dialog box is displayed.



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 document.
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 document.

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



## 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.

# Working with Reports

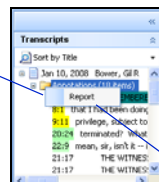
You can generate reports for all Quick Marks, annotations, issues, notes, cases, searches, and Auto Tags. While viewing an Annotations, Issues, or Quick Marks report, you can return to the location in the document where the annotation or mark appears by clicking its section in the report. To return to the report, click the **Report** tab. New annotations are automatically added to the report as you create them, so the report is always current.

## Annotations Report

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

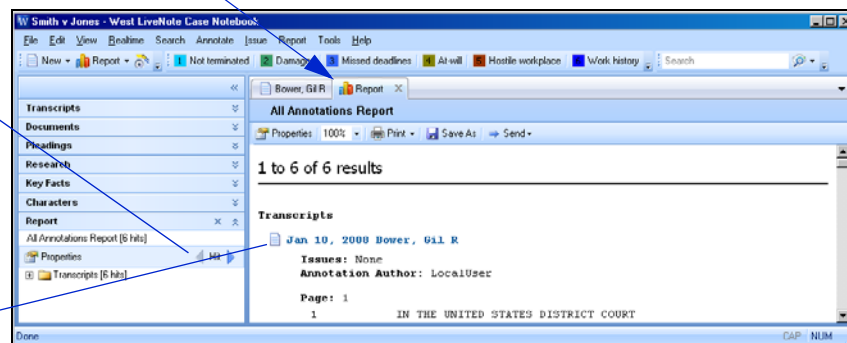
To create an Annotations report for the document you are viewing, right-click the **Annotations** folder in the left pane and click **Report**. The report is displayed on the Report tab in the right pane and listed under *Report* in the left pane.

Right-click the **Annotations** folder, then click **Report** to create an Annotations report for the document you are viewing.



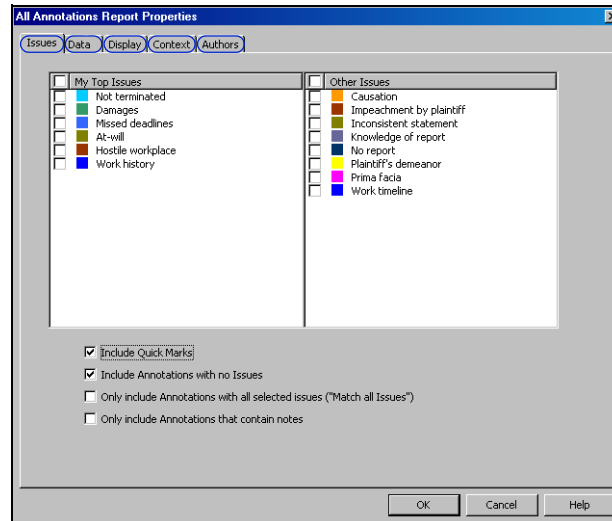
Click the **Hit** arrows to view the next or previous annotation in your report.

Click a heading next to an icon in the report to go to the location in the document where the annotation appears.




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

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




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 all document types and data. 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 secured case on the network, a list of all annotation authors is displayed. If you are working on the case off the network, 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 displayed on the Report tab in the right pane and listed under *Report* in the left pane.


### Verbatim Digest Report

This is an Annotations report that includes only highlighted document text. To create a Verbatim Digest report, first create an Annotations report. Then click the **Properties** button (  ) on the toolbar above the report in the right pane to display the All Annotations Report Properties dialog box. Click the **Display** tab. Clear all check boxes except the *Highlight* check box under *Annotations*, then click **OK**.

## Notes Report


This report lists all of the annotations in a document 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 (  ) 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**.

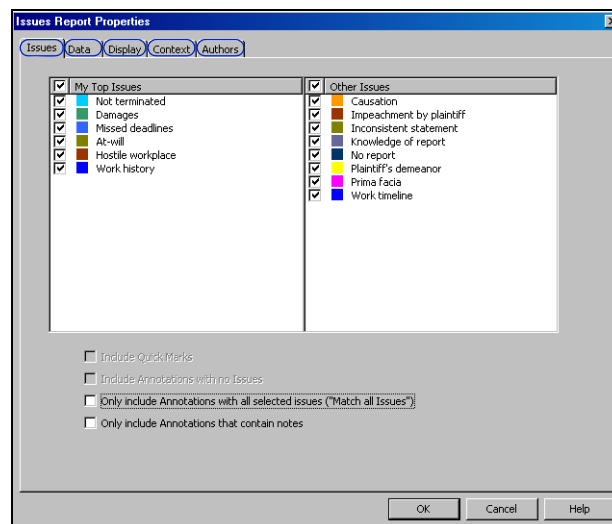
## Attachments Report

This report lists all of the annotations in a document 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 (  ) 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 except the *Attachments* check box under *Annotations*, then click **OK**.

## Issues Report

This report lists all of the issues in a document, 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.




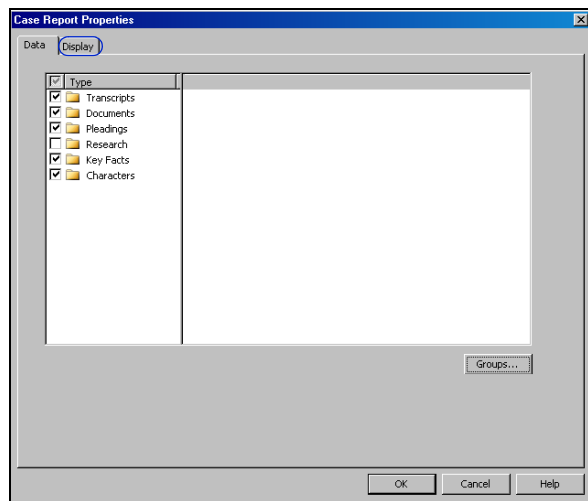
2. All of the issues in the case are selected on the Issues tab by default. To remove an issue from the report, clear its check box.
3. Select the **Only include Annotations with all selected issues (“Match all Issues”)** check box, if desired.
4. Select the **Only include Annotations that contain notes** check box, if desired.
5. Click the **Data** tab to display a list of all document types and data. 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 secured case on the network, a list of all annotation authors is displayed. If you are working on the case off the network, 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 displayed on the Report tab in the right pane and under *Report* in the left pane.


## Case Report

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

1. Click the **Report** button (  Report ) on the Main Menu toolbar, then choose **Case** from the menu. The Case Report Properties dialog box is displayed. By default, all document types and data are selected on the *Data* tab. 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.
2. Click **Groups** to include a data group in your report. Select the group you want to include in your report and click **OK**. For more information on data groups, see “Working with Data Groups” on page 49.
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 displayed on the Report tab in the right pane and listed under *Report* in the left pane.




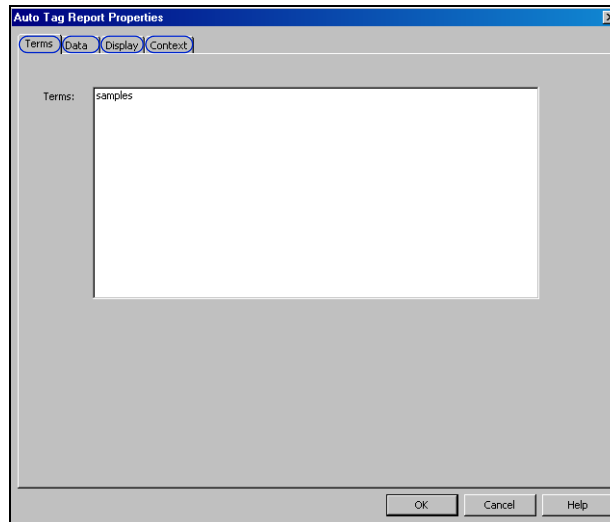
## Search Report

This report lists the result retrieved when you run a search using the Full Text Search feature. To create a Search report, the **Report** button (  Report ) on the Main Menu toolbar, then choose **Full Text Search** from the menu. See “Working with Full Text Search” on page 39 for information on running searches.

## 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 (  Report ) on the Main Menu toolbar, then choose **Auto Tags** from the menu. The Auto Tag Report Properties dialog box is displayed.



2. All Auto Tag terms are listed on the *Terms* tab by default.
3. Click the **Data** tab to display a list of all document types and data. 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.
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 **OK**. The Auto Tag report, which includes the lines with the Auto Tags and the surrounding questions and answers, is displayed on the Report tab in the right pane and listed under *Report* in the left pane.

## Transferring Reports

To transfer the report to another application, such as Microsoft Word, Corel WordPerfect, or TrialDirector, click **Send** on the toolbar above the report in the right pane, then choose an application from the menu.

## Saving Reports

To save a report, complete these steps:

1. Click **Save Report as** on the toolbar above the report in the right pane. 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. Select a file type from the *Save as type* drop-down list.
5. Click **Save**.



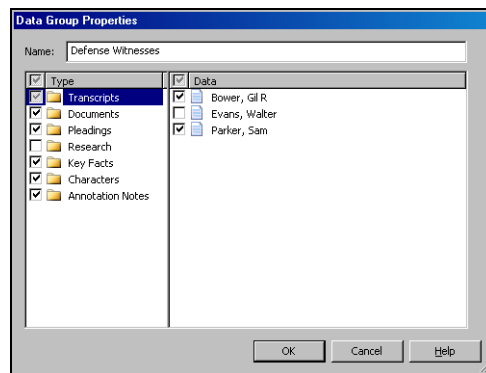
# Working with Data Groups

Document types and data can be arranged in groups. For example, you could create groups based on the different types of witnesses in a case, such as defense witnesses, expert witnesses, and plaintiff witnesses. You can select a group when you are preparing reports or creating searches to ensure all document types and data you need are included.

## 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.



2. Type the name of the group, e.g., **Defense Witnesses**, in the *Name* text box.
3. By default, all document types and data 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 ( Report ▾) 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

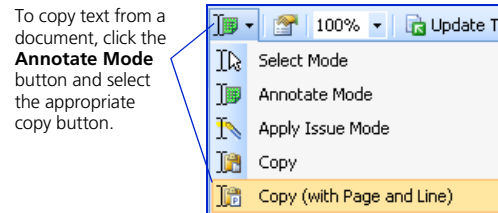
You can run full text searches using data groups. To conduct a search using data groups, complete these steps:

1. From the Search menu, choose **Full Text Search**. The Full Text Search Properties dialog box is displayed.
2. 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 search and click **OK**.
4. Click **OK** again in the Full Text Search Properties dialog box to run the search.

See “Working with Full Text Search” on page 39 for more information on using the Full Text Search feature

# Transferring Document Text

You can copy text or a portion of a document and paste it into other applications. For each document type, 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 document in the right pane, then choose the appropriate button from the menu, as discussed below. The menu choices will vary depending on the document type you are viewing.




## Transferring Text of a Transcript

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


- page number (or numbers if copied text spans more than one page)
- line numbers

To transfer transcript text with page and line numbers, 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 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.

## Transferring Text of a Document or Pleading

To transfer the text of a document or pleading 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 or pleading that is an image file or PDF file, you can transfer a portion of the document or pleading. To transfer a portion of a document or pleading, 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.

### Transferring Text of a Westlaw Document

If you are viewing a Westlaw document, you can transfer the citation with the text. To transfer text with its citation, complete these steps:

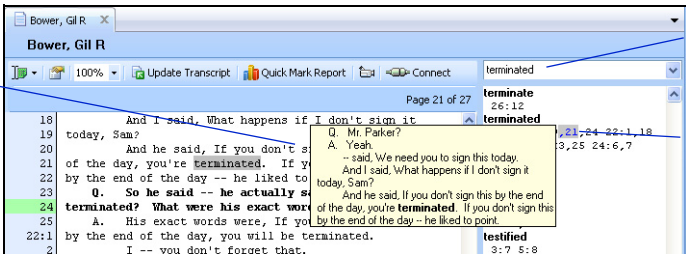
1. Make certain the **Copy (with Citation)** button () is displayed.
2. Select the text you want to copy.
3. Open another application and paste the text you have copied. For example, to paste the text into Microsoft Word, press **Ctrl+V** or choose **Paste** from the Edit menu in Word.

# Using the Word Index

The Word Index contains an index of words and numbers in a document along with their corresponding page and line numbers. When you are connected to Realtime, the Word Index is updated every 15 seconds. Use the Word Index to search for a word or number in the document. Type the word or number in the text box to the right of the document to display the pages and lines where the word or number is found in the document.

To see the word or number in context, hold your pointer over the page and line reference. The question and answer in which the word or number appears is displayed.

To display the word or number in the document, click the page and line reference.



Click the page and line reference to view your word or number in the document.

Type the word or number you want to search for in the Word Index text box.

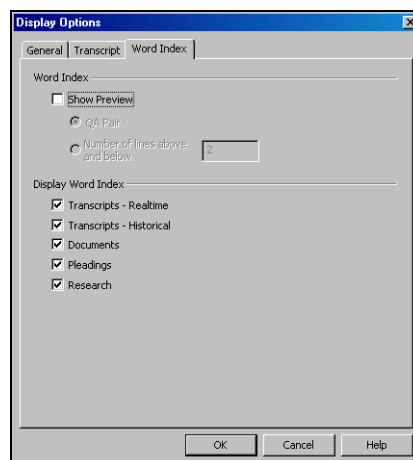
Hold your pointer over the page and line reference to see your word or number in context.

## 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. Click the **Word Index** tab. You can specify

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

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





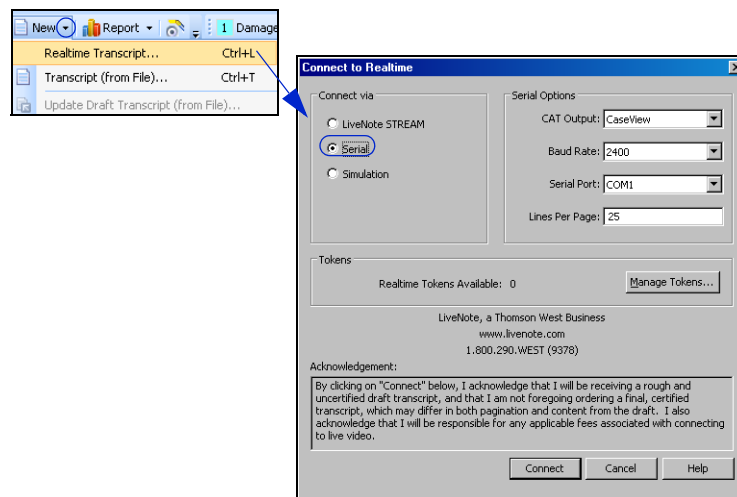
# Connecting to Realtime

## 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 a Real-Time Session: West LiveNote/West Case Notebook* at [west.thomson.com/westlaw/guides/LiveNote.aspx](http://west.thomson.com/westlaw/guides/LiveNote.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.



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 Case Notebook software or through Microsoft Internet Explorer.

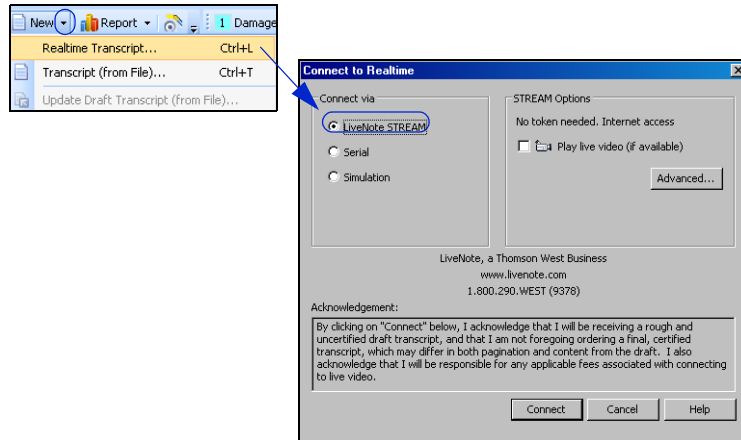
The court reporter must notify LiveNote *24 hours in advance* if you want to use LiveNote Stream to view transcript text or *72 hours in advance* to view video and text. LiveNote will send you an e-mail with the required username and password.

**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 Case Notebook

To connect to Realtime using LiveNote Stream through West Case Notebook, 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.



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 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 Case Notebook software to access LiveNote Stream through Internet Explorer.

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

1. Go to [www.livenote.com/stream](http://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.





### Access to Features in LiveNote Stream

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

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



# Working with a Transcript in Realtime

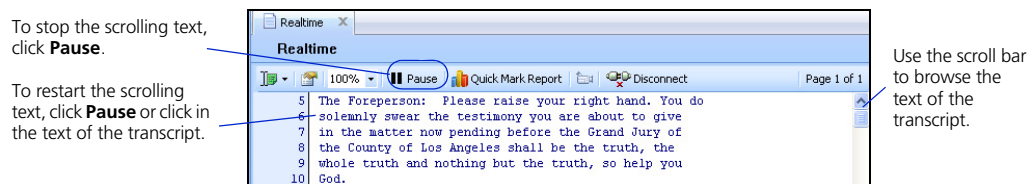
West Case Notebook provides you with tools that are easy to use even when you are working with a transcript in Realtime. You can stop and start the scrolling text, annotate the text, and do quick word searches at the same time that you are listening to what the deponent or witness is saying. You can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

## Starting and Stopping Text

To stop the scrolling transcript while in Realtime, click **Pause** on the toolbar above the transcript.

To browse the text of the transcript, you can use the scroll bar on the right or press the **Page Up** and **Page Down** keys or the arrow keys on your keyboard. Pressing **Ctrl+Home** will take you to the top of the text; pressing **Ctrl+End** will take you to the end of the text.

To restart the scrolling transcript, click **Pause** again or click in the text of the transcript.

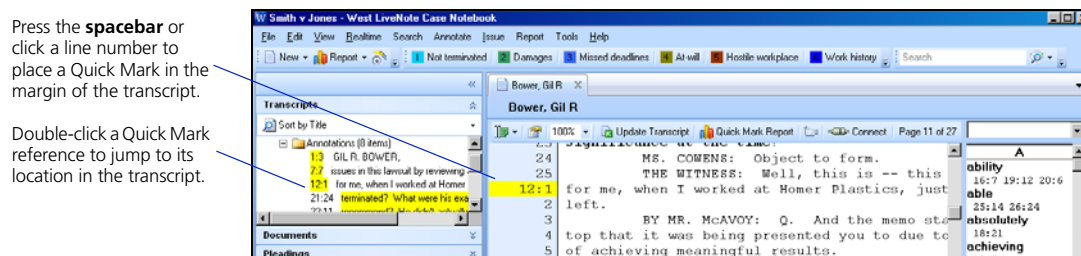


## Using Quick Marks

Quick Marks are marks at the line number in the margin of a transcript. They are the simplest form of annotation in West Case Notebook 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, press the **spacebar** on your keyboard or 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.




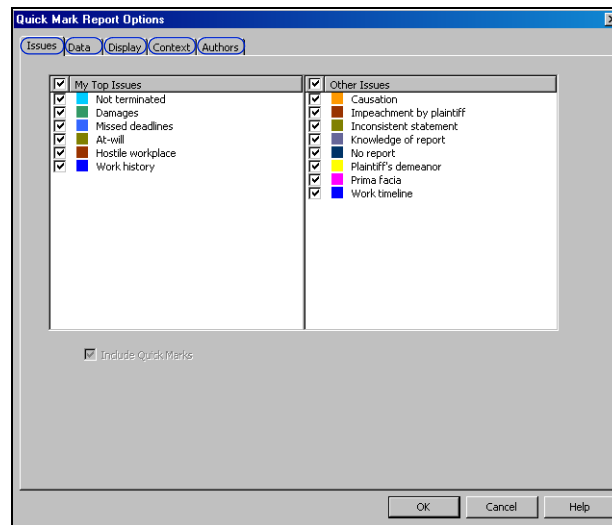
## Quick Marks Report

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.



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 secured case on the network, a list of all annotation authors is displayed. If you are working on the case off the network, 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

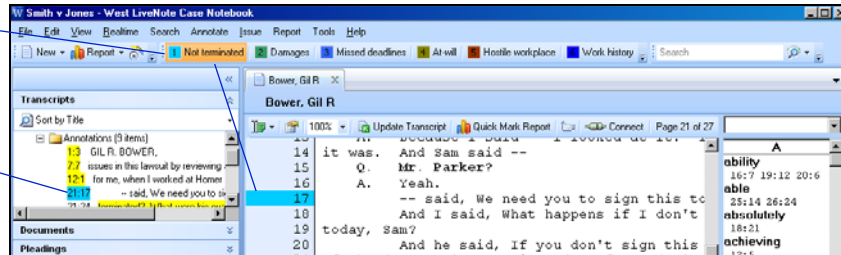
An Issue Mark is a mark at the page and line number in the margin of a transcript that corresponds to a particular issue on the Main Menu toolbar. The Issue Mark color is the same as the color of the issue. To insert an Issue Mark, click an issue button on the Main Menu toolbar, then click a line number.

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.

Click an issue button on the Main Menu toolbar, then click a line number to place an Issue Mark in the margin of the transcript.

Double-click an Issue Mark reference to jump to its location in the transcript.





# Working with Annotations and Video in Transcripts

## Playing Annotation 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 an annotation. To view the video, right-click anywhere in the annotation, then choose **Play Video Segment** from the menu.

## Transferring 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.

## 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 A: 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 a report. To create an Errata report, complete these steps:

1. Create an issue named **Errata** (see “Working with Issues” on page 33) 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 displayed on the Report tab in the right pane and listed under *Report* in the left pane.
7. Click the **Properties** button (  ) on the toolbar above the report in the right pane to display the All Annotations Report Properties dialog box.
8. On the Issues tab, select 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.

# Appendix B: Converting RealLegal Binder Cases to West Case Notebook Cases

When you open a RealLegal Binder case in West Case Notebook version 1.1, 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
<p><b>Transcripts</b></p> <ul style="list-style-type: none"> <li>■ transcript text</li> <li>■ transcript properties: Type, Status, Last, First, Volume, Date, Title, Taking Attorney, For, Comment</li> <li>■ links to documents from transcripts</li> <li>■ signature for signed transcripts (version 7.0 and later)</li> <li>■ video sync information</li> </ul>	<p><b>Transcripts</b></p> <ul style="list-style-type: none"> <li>■ transcript properties: Time, Plaintiff, Defendant</li> </ul>
<p><b>Documents</b></p> <ul style="list-style-type: none"> <li>■ document contents</li> <li>■ document properties: Type, Author, Recipient, Bates Range, Date, OCR information</li> </ul>	<p><b>Documents</b></p> <ul style="list-style-type: none"> <li>■ document properties: Title</li> <li>■ exhibit check box data; exhibit number; exhibit prefix</li> </ul>
<p><b>Annotations</b></p> <ul style="list-style-type: none"> <li>■ all annotations</li> <li>■ issues, including name and color</li> <li>■ attachment URLs are preserved</li> <li>■ comments converted to notes</li> </ul>	<p><b>Annotations</b></p> <ul style="list-style-type: none"> <li>■ chronology date</li> <li>■ active issue properties</li> <li>■ annotations authors only converted when imported into a secure case</li> </ul>
<p><b>Search groups</b></p> <ul style="list-style-type: none"> <li>■ search groups converted to data groups</li> <li>■ search group name converted to data group title</li> <li>■ transcripts and documents from the search group converted to Data Group</li> </ul>	<p><b>Search groups</b></p> <ul style="list-style-type: none"> <li>■ preprogrammed search groups that come with RealLegal Binder</li> <li>■ saved reports</li> </ul>

# Appendix C: 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 64 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 media file.**

This is a catchall error message designed for unsupported scenarios. Please contact 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 Case Notebook only supports specific types of video files. For example, you cannot create video clips from RM (RealMedia) 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.**

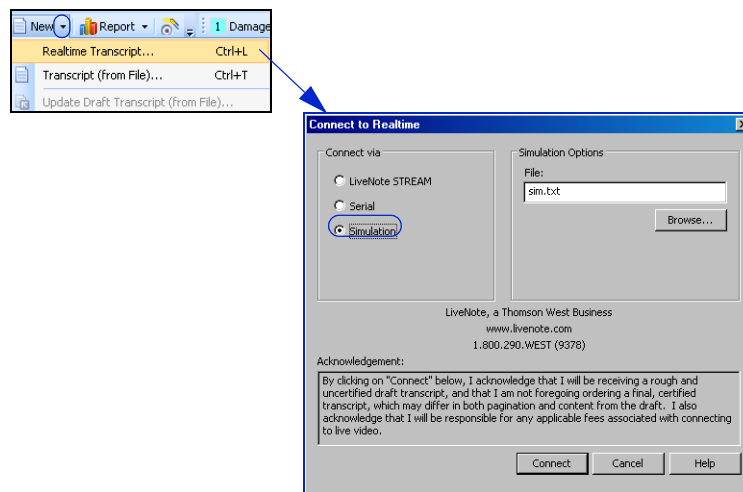
PowerPoint must be installed before you can transfer annotations to PowerPoint.

# Appendix D: Connecting to a Simulated Realtime Transcript

When West Case Notebook 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 Case Notebook.

To access the simulation, complete these steps:

1. Access West Case Notebook.
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.



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**.

# Appendix E: Trial Version of West Case Notebook

West Case Notebook offers a trial version of its software. 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
- generate reports

In the trial version, you cannot

- update transcripts, documents, pleadings, and research files
- delete transcripts, issues, or annotations
- 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

**Note:** A transcript printed from the trial version includes a *Demo* watermark.

## System Requirements

You will need the following to run the trial version of West LiveNote (if you intend to view video, use the recommended configurations):

- IBM PC or compatible computer with Pentium 4 processor
- Windows Vista or Microsoft Windows XP Service Pack 2
- 1 GB of RAM (2 GB recommended) for Microsoft Windows XP
- 1 GB of RAM (2 GB recommended) for Windows Vista
- 10 GB of available hard disk space (100 GB recommended)
- Microsoft Internet Explorer 6 or later
- Windows Media Player 9 or later
- one free serial port for Realtime connection

If you do not have a free serial port, you can connect to Realtime with a serial adapter connected to a USB port or through the Internet with LiveNote Stream. For more information on LiveNote Stream, see “Using LiveNote Stream” on page 55.





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For assistance using West CaseNotebook, call 1-800-290-9378.  
For free reference materials, visit  
[west.thomson.com/support/user-guide/livenote-case-notebook.aspx](http://west.thomson.com/support/user-guide/livenote-case-notebook.aspx).



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