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WESTLAW™

WESTLAW CASE NOTEBOOK
USER GUIDE

JULY 2012

THOMSON REUTERS™

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About This Guide

Thomson Reuters continues to develop new features and improve existing features for its products. Because of these improvements and the evolving nature of Internet technology, there may be recent changes to the product interface and functionality that are not reflected in this documentation.

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Contents

1 Introduction

Westlaw Case Notebook is an electronic organizer and deposition tool for saving and working with important documents, research, and transcripts. With 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 or WestlawNext to a case file
- check KeyCite status
- create outlines and transcript summaries
- build issues databases by creating categories and highlighting text
- summarize issues by running reports
- copy text from a Westlaw or WestlawNext document and paste the text along with the citation into a word-processing document
- connect to a deposition transcript in real time

File Types for Importing Transcripts

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

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

File Types for Importing Documents and Pleadings

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

- Images
  - TIF/TIFF (Tagged Image File Format)
  - BMP (Bitmap)
  - JPE/JPG/JPEG (Joint Photographic Experts Group)
  - GIF (Graphic Interchange Format)
  - PNG (Portable Network Graphics)
  - JFX
- PDF (Portable Document Format)
- DOC/DOCX (Microsoft Word file)
- WP/WPD (Corel WordPerfect file)
- MSG (Microsoft Outlook file)
- HTM/HTML (Hypertext Markup Language)
- PEX (LiveNote document file)
- 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.

Getting Help

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

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

2 Managing Cases

Creating a New Local Case

Cases in Case Notebook can be created for one person to use (local cases), or they can be created through the Westlaw Case Notebook Administration module to be available on a network so they can be shared (secure cases). Local cases can be imported through the Westlaw Case Notebook Administration module to also make them shareable. For further information on Westlaw Case Notebook Administration, download a free copy of the *Westlaw Case Notebook Administration User Guide* at store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.

To create a new case, follow these steps:

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

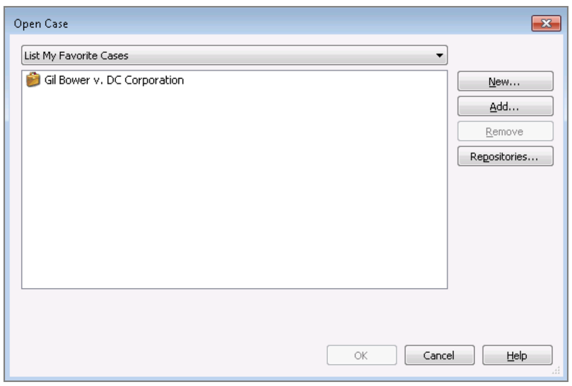


Figure 2-1. Open Case dialog box

2. Click **New** to display the Save As dialog box.
3. Click 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. In the **Name** box, type the name of the case, e.g., **Smith v Jone**s.
5. Click **OK**.

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

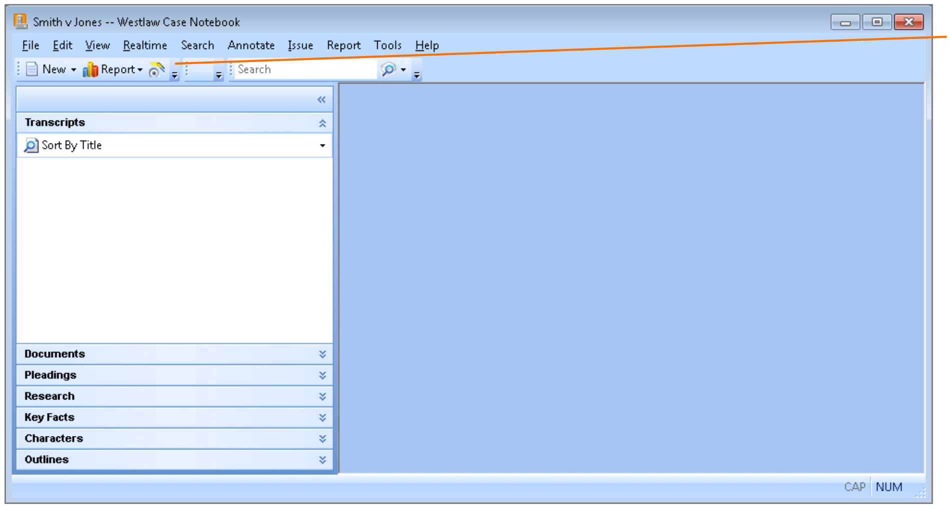


Figure 2-2. Case window

CREATING A NEW CASE FROM AN OPEN CASE

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

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

Opening a Local Case

To open a case, on the **File** menu, click **Open Case** to display the Open Case dialog box. Click your case in the list and click **OK**.

Importing a Case

To import a case, complete these steps:

1. Click the **New** arrow, then click **Case (from File)** on the menu. The Open dialog box is displayed.
2. Click your case and click **Open**. The Save As dialog box is displayed.
3. In the **File name** box, type a file name.
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 Case Notebook. To open a RealLegal Binder case, complete these steps:

1. On the **File** menu, click **Open Case** to display the Open Case dialog box.
2. Click **Add**. The Open dialog box is displayed.
3. Click 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. In the **File name** box, type a file name and click **Save**. The case is listed in the Open Case dialog box.
6. Click 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 Case Notebook cases, see Appendix B.

Accessing Secure Cases

Note

- If you are working on a secure case with other users, all users must use the same version of Case Notebook. For example, if a secure case is upgraded to Case Notebook 3.0, all users working on the case must use Case Notebook 3.0.
- If you are working in a Case Notebook 3.0 case, then revert to using Case Notebook 1.0, you must manually rebuild the search index for the case. To rebuild the search index, on the **Tools** menu, click **Advanced**, then click **Rebuild Search Index**.

To access a secure case, complete these steps:

1. Access Case Notebook. Or in an open case, on the **File** menu, click **Open Case**. The Open Case dialog box is displayed (Figure 2-3).

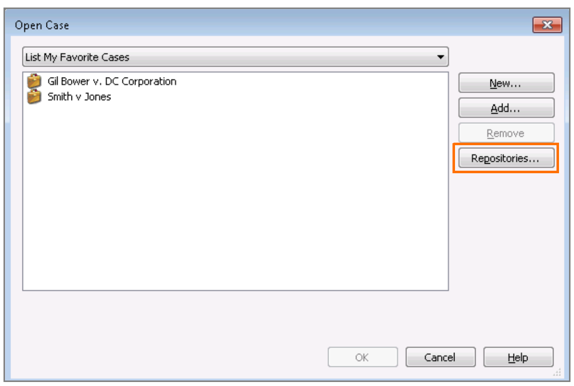


Figure 2-3. Open Case dialog box

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

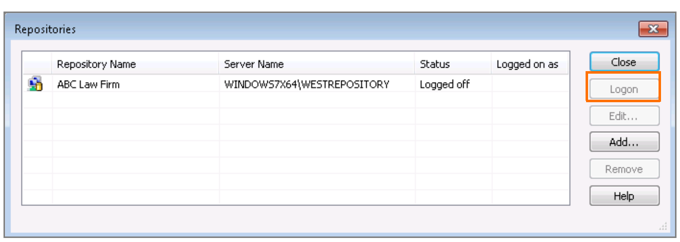


Figure 2-4. Repositories dialog box

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

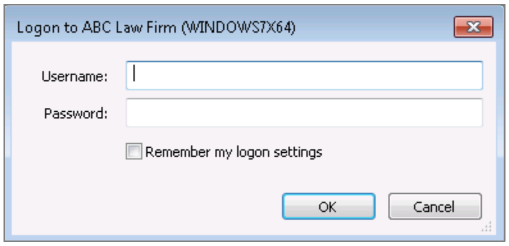


Figure 2-5. Logon to [Repository Name] dialog box

4. In the **Username** and **Password** boxes, type your username and the password that is assigned to you in Westlaw Case Notebook Administration.
5. Select the **Remember my logon settings** check box if you want Case Notebook to remember your username and password.
6. Click **OK**. The Repositories dialog box is redisplayed (Figure 2-6).

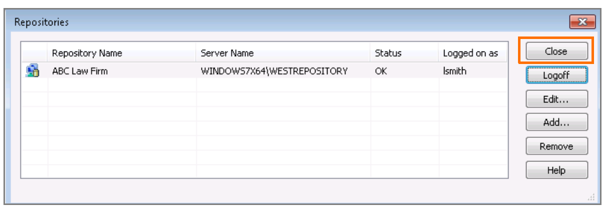


Figure 2-6. Repositories dialog box

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

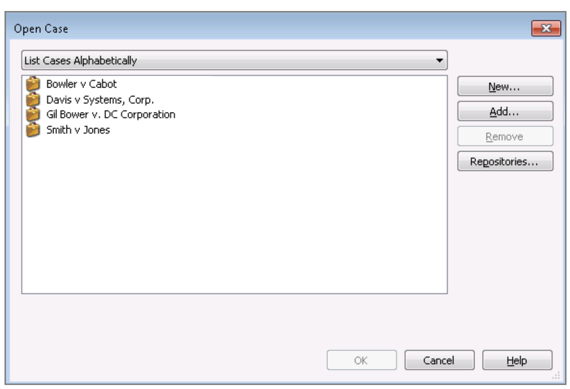


Figure 2-7. Open Case dialog box

Note Two types of case icons may be displayed:

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

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

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

ACCESSING SECURE CASES THROUGH WESTLAW CASE NOTEBOOK RAS

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

When you use RAS, you cannot:

- copy a case
- administer remote cases using Westlaw Case Notebook Administration
- connect to LiveNote Realtime

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

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

Viewing a List of Favorite Secure Cases

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

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

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

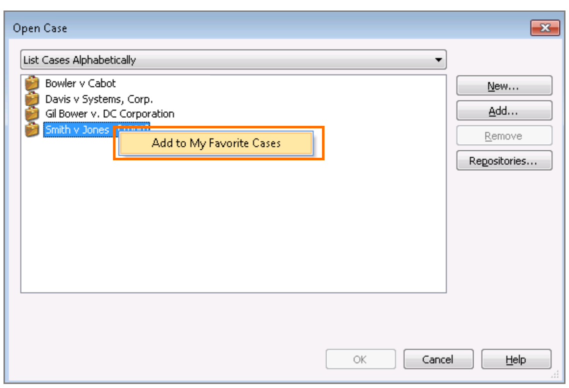


Figure 2-8. Open Case dialog box

2. Right-click the case you want to add to your list of favorite cases, e.g., **Clelland v Anderson**, and click **Add to My Favorite Cases**.

3. Click **List My Favorite Cases** in the list at the top of the dialog box. Your list of favorite cases is displayed (Figure 2-9).

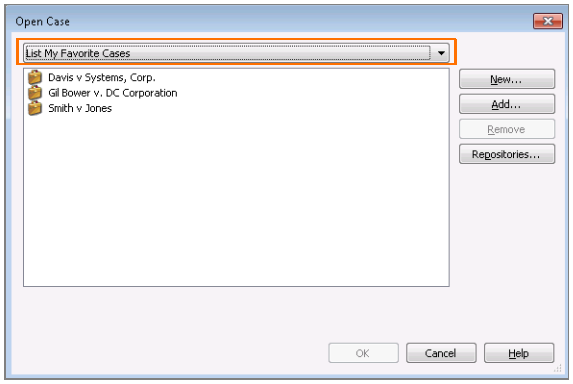


Figure 2-9. List of favorite cases

Replicating Cases Offline and to the Network

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

REPLICATING A CASE OFFLINE

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

1. On the **File** menu, click **Replicate Case Offline**. The Case Data dialog box is displayed (Figure 2-10).

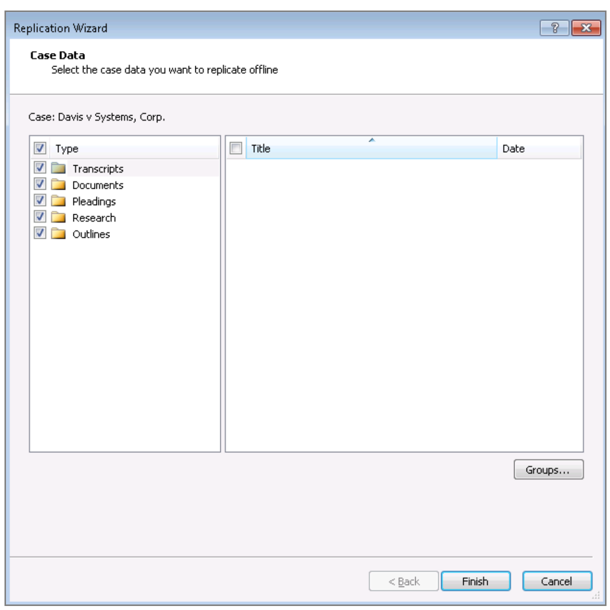


Figure 2-10. Case Data dialog box

2. Select the document type and data you want to replicate offline.
3. Click **Groups** to add the data you selected to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the data and click **OK**.

Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.

4. Click **Finish**. The Cases Replicated to Offline dialog box is displayed, informing you that the case was successfully replicated offline.
5. Click one of the following:
   - **Open Case**. The case is displayed in the left pane.
   - **Close**. The case is closed.

REPLICATING A CASE TO THE NETWORK

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

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

REPLICATING MULTIPLE CASES OFFLINE

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

1. Click **Options** on the **Tools** menu. The Options dialog box is displayed.
2. On the Confirmation tab, select the **Replicate offline on closing Westlaw Case Notebook** check box, then click **OK**.
3. Close Case Notebook. The Cases dialog box is displayed (Figure 2-11).

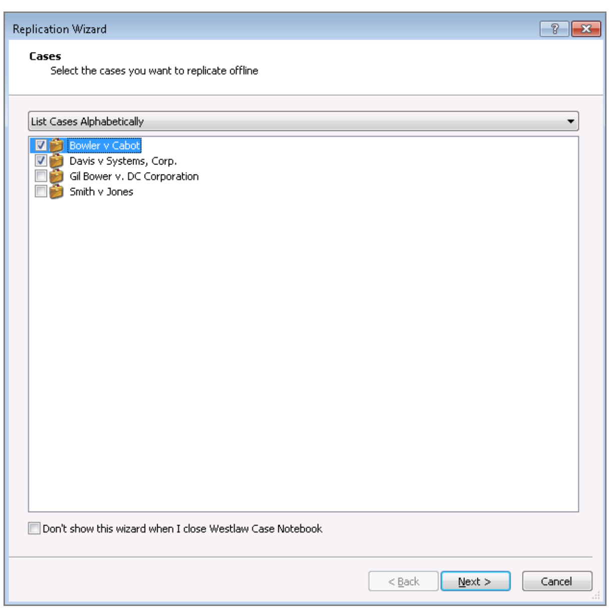


Figure 2-11. Cases dialog box

4. Select the cases you want to replicate offline.
5. Click **Next**. The Case Data dialog box for the first case you selected is displayed.

6. Select the document types and data you want to replicate offline.
7. Click **Groups** to add the data you selected to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the data and click **OK.**

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.
8. Click **Next**. If you selected more than one case, the Case Data dialog box for the next case you selected is displayed.
9. Repeat steps 6–8 for each case you want to replicate offline.
10. When you have finished selecting the document types for all the cases you want to replicate offline, click **Finish**. The Cases Replicated to Offline dialog box is displayed, informing you that the cases were successfully replicated offline.
11. Click **Close**. Case Notebook is closed.

REPLICATING MULTIPLE CASES TO THE NETWORK

1. If you replicated cases offline, the next time you access Case Notebook, the Offline Cases dialog box is displayed (Figure 2-12).

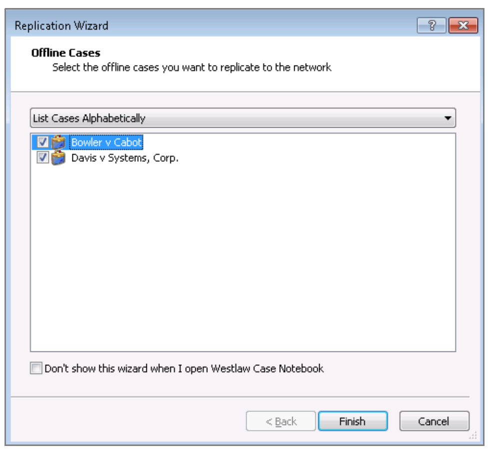


Figure 2-12. Offline Cases dialog box

2. By default, all the cases that you replicated offline are selected. To exclude a case from being replicated to the network, clear its check box.
3. Click **Finish**. The Cases Replicated to Network dialog box is displayed.
4. Select a case, then click one of the following:
   - **Open Case**. The case is displayed in the left pane.
   - **Close**. The case is closed.

Changing Replication Options

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

1. On the **Tools** menu, click **Options**. The Options dialog box is displayed (Figure 2-13).

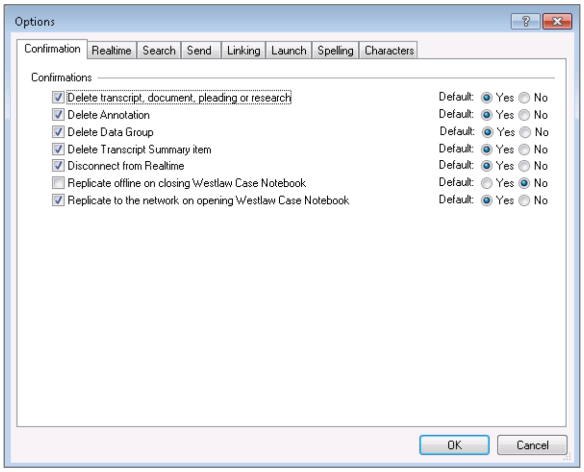


Figure 2-13. Options dialog box

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

Viewing Case Contents

You can view a summary of your case contents in the Case Properties dialog box, shown outlined in Figure 2-14. To access the Case Properties dialog box, on the **File** menu, click **Case Properties**.

While viewing the dialog box, you can copy the summary data and paste it into another application. To copy the summary data, right-click at the top of the dialog box and click **Copy Summary Data** on the menu.

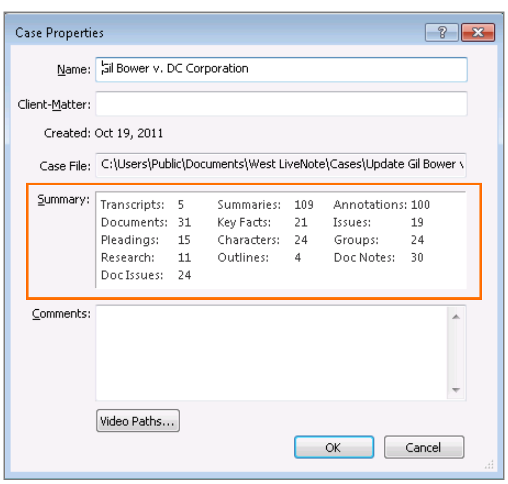


Figure 2-14. Case Properties dialog box

Creating a Case Report

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

1. On the **Main Menu** toolbar, click the **Report** button (Report), then click **Case** on the menu. The Case Report Properties dialog box is displayed (Figure 2-15). 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.

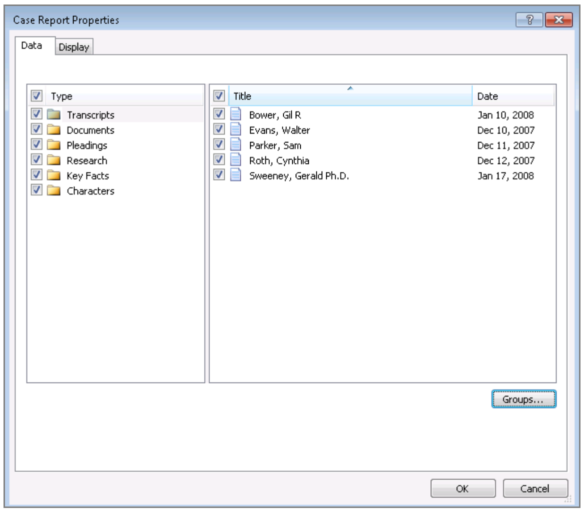


Figure 2-15. Case Report Properties dialog box

2. Click **Groups** to include only the data in a data group in your report. Select the group you want to include in your report and click **OK**. For further information on data groups, see "Working with Data Groups" on page 104.
3. Click the **Display** tab to view a list of display options. In the **Title** box, type a title for the report, if desired. Then select or clear the appropriate check boxes.
4. Clear the **Include cover page when printing or saving** check box, if desired.
5. Click **OK**. The Case report is listed under Report in the left pane and the text of the report is displayed on the Report tab in the right pane.

3 Managing Transcripts

Importing a Transcript

To import a transcript, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Transcript (from File)** on the menu. The Transcript File dialog box is displayed.
2. Click **Browse** to display the Browse for Transcript Files dialog box.
3. In the **Files of type** list, click a file type. Then click your transcript and click **Open**. The 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 Transcript Properties dialog box is displayed (Figure 3-1).

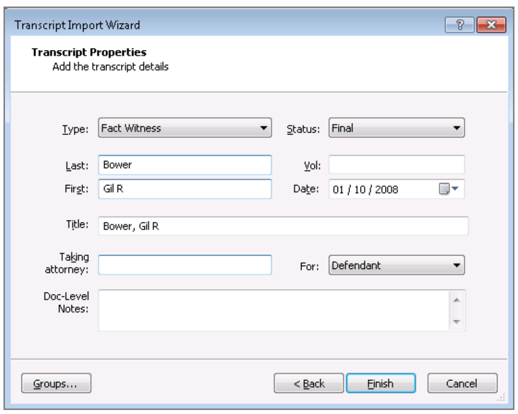


Figure 3-1. Transcript Properties dialog box

5. In the Doc-Level Notes box, type a note, if desired. The note will be displayed in the transcript's Annotations folder in the left pane and on the Overview and Doc-Level Notes tabs in the Transcript Properties dialog box. Additionally, you can include the note text in a search. For further information, see "Adding Doc-Level Notes" on page 83.
6. Click **Groups** to add the transcript to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the data and click **OK.** The Transcript Properties dialog box is redisplayed.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.

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

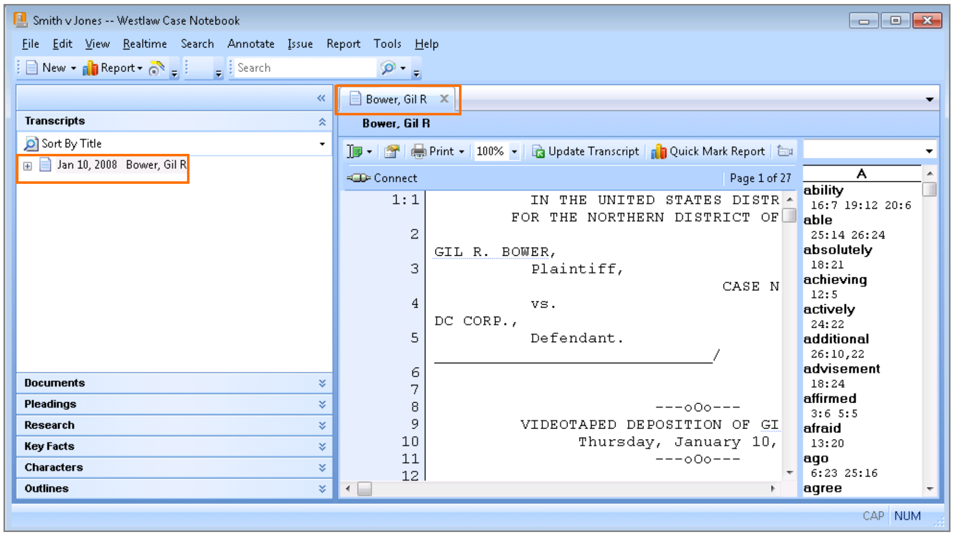


Figure 3-2. Imported transcript

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

Case Notebook automatically adds characters in the transcript to the list of characters in the case. If characters are added when you import the transcript, the Characters tab is also displayed after you import the transcript.

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.

Creating a Transcript Summary

The Transcript Summary feature allows you to summarize portions of a transcript and create a report of the transcript summary items. To create a transcript summary, complete these steps:

1. Open the transcript you want to summarize.

2. On the **Main Menu** toolbar, click the **New** arrow, then click **Transcript Summary** on the menu. The Summary Item section is displayed below the transcript in the right pane, shown outlined in Figure 3-3.

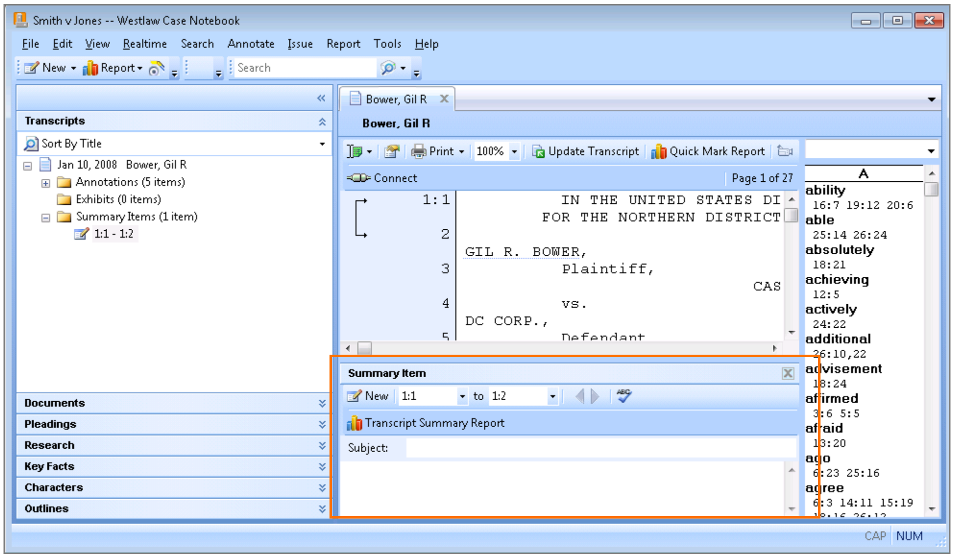


Figure 3-3. Summary Item section

3. The arrows in the left margin of the transcript designate the start and end positions of the transcript summary item. By default, page 1, line 1 is the start position and page 1, line 2 is the end position of the first summary item.

   To change the start position,

   - in the **Start Position** box, type a new page and line number, e.g., **13:25**
   - click the arrow next to the **Start Position** box and click a page and line number in the list

   To change the end position,

   - in the **End Position** box, type a new page and line number, e.g., **15:9**
   - click the arrow next to the **End Position** box and click a page and line number in the list
   - click a page and line number in the left margin of the transcript

   Note You can set start and end positions only for portions of the transcript that you have not summarized previously.

4. In the **Subject** box, type a name for the transcript summary item, e.g., **Current employment**, if desired.

5. Under Subject, type a summary of the portion of the transcript you selected, if desired.

   Note You can also copy transcript text and paste it in the summary item, if desired.

6. To check the spelling in a summary item, click the **Spellcheck** button ( ) on the toolbar.

7. To create a new transcript summary item, click the **New Summary Item** button ( ) on the toolbar.

8. To view consecutive summary items, click the **Previous Item** button ( ) or the **Next Item** button ( ) on the toolbar.

9. To close the Summary Item section, click the **Close** button ( ).

All summary items are saved automatically when you click the **New Summary Item** button or close the Summary Item section. They are listed in the Summary Items folder under the transcript in the left pane.

Note Once you save a summary item, you cannot change its page and line numbers.

CREATING A TRANSCRIPT SUMMARY REPORT

The Transcript Summary report lists the page and line numbers, the subject, and the text of all transcript summary items. To create a Transcript Summary report, complete these steps:

1. Click the **Transcript Summary Report** button (Transcript Summary Report) on the toolbar in the Summary Item section. Or on the **Main Menu** toolbar, click the **Report** button (Report), then click **Transcript Summaries** on the menu. The Transcript Summary Report Properties dialog box is displayed.
2. All of the transcripts in the case are selected on the Data tab by default. To remove a transcript from the report, clear its check box.
3. Click **Groups** to include the data in a data group in your outline. The Data Groups dialog box is displayed. Click the group you want to include in the report and click **OK**. The Transcript Summary Report Properties dialog box is redisplayed.
4. Click the **Display** tab to view a list of display options. In the **Title** box, type a title for the report, if desired. Then select or clear the appropriate check boxes.
5. Click **OK**. The Transcript Summary report is listed under Report in the left pane and the text of the report is displayed on the Report tab in the right pane (Figure 3-3).

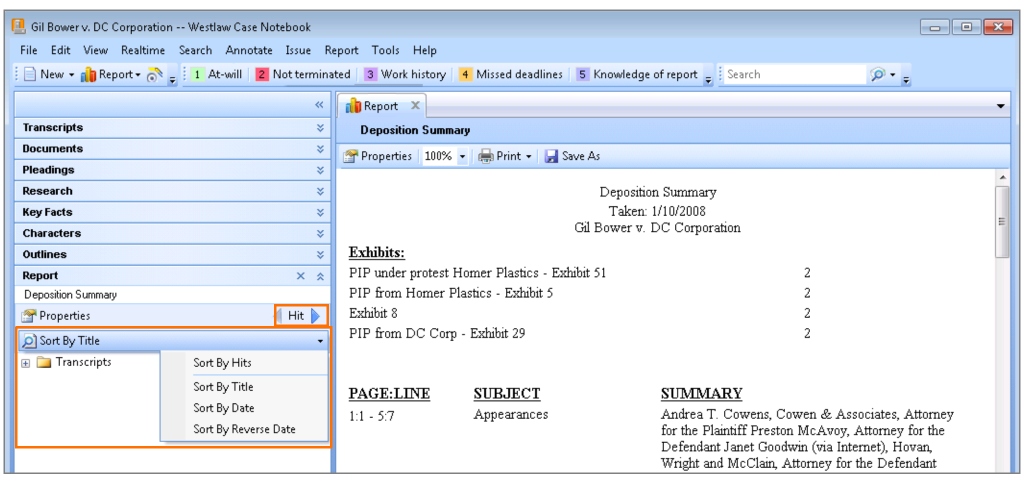


Figure 3-4. Transcript Summary report

When viewing the report, you can

- click the **Hit** arrows in the left pane to view the next or previous summary in the report.
- click the **Sort by** arrow in the left pane to sort your report.

Saving a Transcript Summary Report

To save a transcript summary report, complete these steps:

1. Click **Save As** on the toolbar above the report in the right pane. The Save As dialog box is displayed.
2. Click a location for the file.
3. In the **File name** box, type a file name.

4. In the **Save as type** list, click a file type.
5. Click **Save**.

Printing a Transcript Summary Report

To print a transcript summary report, click **Print** on the toolbar above the report in the right pane to display the Print dialog box. Then click **Print**.

OPENING A TRANSCRIPT SUMMARY ITEM

1. If necessary, click **Transcripts** in the left pane to display a list of all transcripts in the case.
2. Double-click the transcript containing the summary item you want to open. The text of the transcript is displayed in the right pane.
3. Double-click the **Summary Items** folder under the transcript in the left pane to view a list of summary items.
4. Double-click the summary item you want to open. The item is displayed in the Summary Item section below the transcript in the right pane.

DELETING A TRANSCRIPT SUMMARY ITEM

To delete a summary item, right-click the summary item in the left pane and click **Delete**. The message Permanently delete the selected summary item? is displayed. Click **Yes**.

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 click **Delete** on the menu. The message Permanently delete the selected Transcript and all associated Annotations? is displayed. Click **Yes**.

Printing a Transcript with Annotations

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

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

4. Click the **Annotations** tab (Figure 3-5).

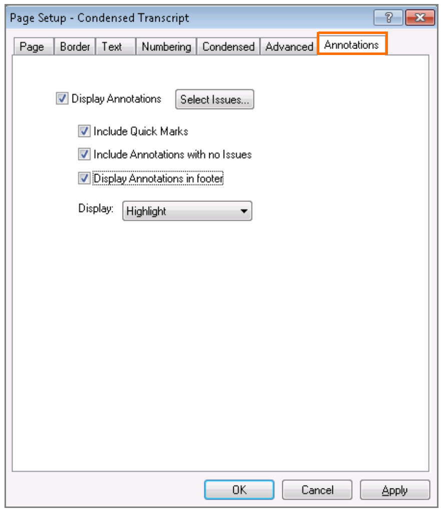


Figure 3-5. Page Setup–Condensed Transcript dialog box–Annotations tab

5. Select the **Display Annotations** check box, if necessary.
6. To include or exclude annotations associated with specific issues from the printed transcript, click **Select Issues**. The Select Issues dialog box is displayed. Issues will be listed in this dialog box only if they have previously been created. See "Working with Issues" on page 86.
7. Select or clear the check boxes next to the issues you want to include or exclude and click **OK**. The Page Setup–Condensed Transcript dialog box is redisplayed.
8. Select the **Include Quick Marks** check box, if desired.
9. Select the **Include Annotations with no Issues** check box, if desired.
10. Select the **Display Annotations in footer** check box.
11. In the **Display** list, click the option for how you want the annotations displayed in the transcript text.

12. Click **OK**. The transcript with its annotations is displayed (Figure 3-6).

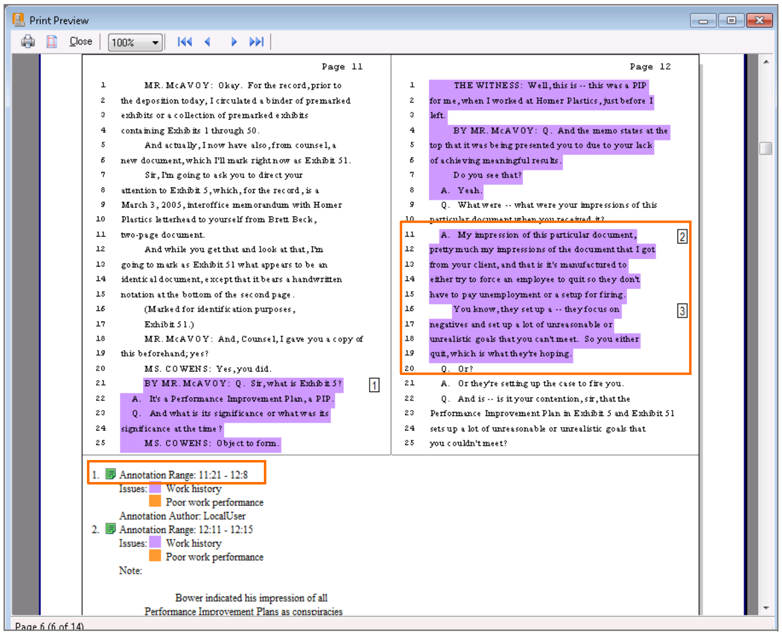


Figure 3-6. Preview of transcript with annotations

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

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

Printing Headers and Footers in Transcripts

You can add a header and footer to each page of a printed transcript, which can help you view transcript information when printing selected pages. For example, to add a header, complete these steps:

1. Open the transcript you want to print.
2. Click the **Print** arrow on the toolbar above the transcript and click either **Print Preview Full-Sized** or **Print Preview Condensed** on the menu. The Print Preview dialog box is displayed.
3. Click the **Properties** icon ( ) to display the Page Setup dialog box.

4. Click the **Page** tab (Figure 3-7).

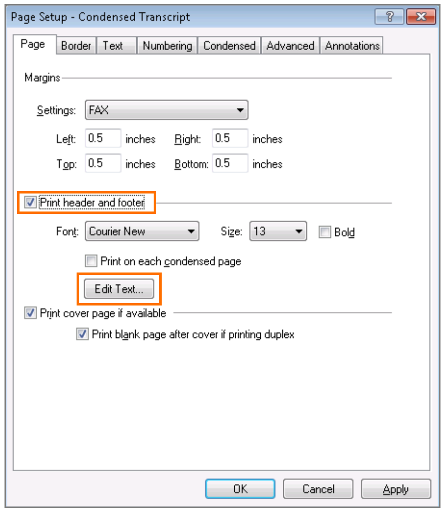


Figure 3-7. Page setup dialog box–Page tab

5. Select the **Print header and footer** check box.
6. Click a different font and size in the **Font** and **Size** lists and select the **Bold** check box, if desired.
7. Click **Edit Text**. The Header and Footer dialog box is displayed.
8. Click **Header 1**. The Top Header Line dialog box is displayed (Figure 3-8).

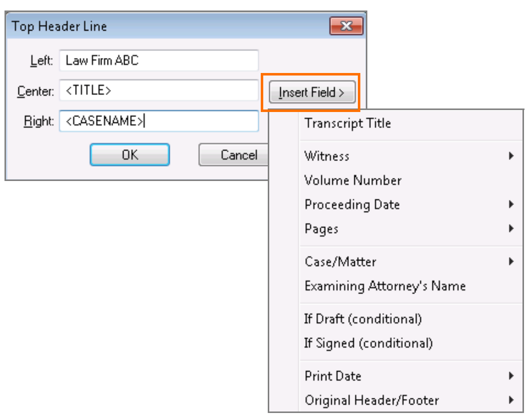


Figure 3-8. Top Header Line dialog box

9. Type your information in the boxes. To add field data to a box, e.g., case matter information, click **Insert Field** and click a field in the menu (Figure 3-8).
10. Click **OK**. The Header and Footer dialog box is redisplayed.
11. Click **Close**. The Page Setup dialog box is redisplayed.

12. Click **OK**. The transcript with the header is displayed (Figure 3-9).

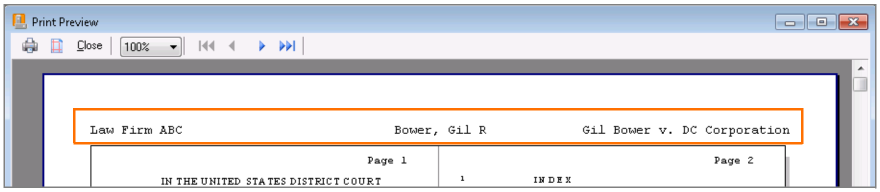


Figure 3-9. Preview of transcript with header

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

Printing Exhibits Linked to Transcripts

The Batch Print feature allows you to print multiple documents at one time, including exhibits that are linked to transcripts. To print exhibits that are linked to transcripts, complete these steps:

1. On the **File** menu, click **Batch Print**. The Items to Print dialog box is displayed (Figure 3-10).

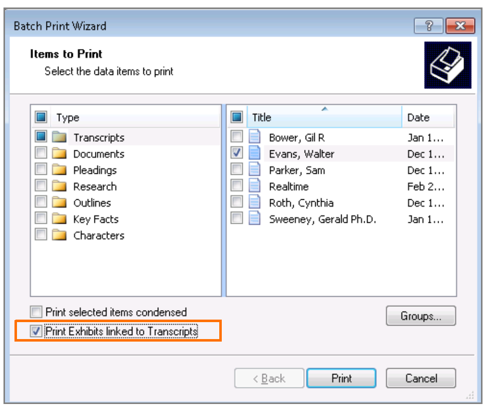


Figure 3-10. Items to Print dialog box

2. Click **Transcripts** in the left pane, then select the check box for the transcript you want to print with its exhibits in the right pane.
3. Select the **Print Exhibits linked to Transcripts** check box.
4. Click **Print**.

Viewing Transcript Properties

To view the properties for a transcript, right-click the transcript name in the left pane and click Properties on the menu. For further information on properties, see "Working with Properties" on page 79.

4 Updating Transcripts

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

- E-Transcript (PTX or EXE) files—files containing transcript text and, if the transcript is signed, the signature details
- ASCII (text only) files—files containing transcript text, usually received from the court reporter
- Portable Transcript (PTF) files—files containing transcript text and annotations, usually received from another 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 transcript to display the Transcript Properties dialog box.
2. In the **Status** list, click **Draft**.
3. Click **OK**.

Updating with a PTX or EXE File

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

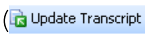
Updating with an ASCII File

1. Click the **Update Transcript** button (Update Transcript) on the toolbar above a transcript in the right pane. The Update Transcript–Transcript File dialog box is displayed.
2. Click **Browse** to display the Browse for Transcript Files dialog box.

3. Select the ASCII file that was sent to you and click **Open**. (Different Computer-Aided Transcription (CAT) systems create different extensions on ASCII files.) The Update Transcript–Transcript File dialog box is redisplayed.
4. Click **Next**. A message warning that the transcript has not been signed electronically may be displayed. Click **Continue**. The Update Transcript–Import Details dialog box is displayed.
5. Click **Next**. The Update Transcript–Import Confirm dialog box is displayed.
6. Click **Next**. The Update Transcript–Transcript Properties dialog box is displayed.
7. Click **Finish**. The Update Transcript–Update Completed dialog box is displayed.
8. Click **Close**.

Updating with a PTF File

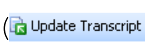
Use this method when you want to merge two sets of annotations into one transcript when replication is not available.

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

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

Updating with a LEF File

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

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

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

7. Under Import Annotations, **Add to existing Annotations** is automatically selected. This is the correct selection for merging the annotations. Select **Replace existing Annotations** if you want to replace one set of annotations with another set.
8. Click **Next**. A message warning that the transcript has not been signed electronically may be displayed. Click **Continue**. The Update Transcript–Transcript Properties dialog box is displayed.
9. Click **Finish**. The Update Transcript–Update Completed dialog box is displayed.
10. Click **Close**.

5 Managing Documents

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

Importing a Document

To import a document, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Document (from File)** on the menu. The Document Files dialog box is displayed.
2. Click **Add** to display the Open dialog box.
3. Click your document and click **Open**. The Document Files dialog box is redisplayed.
4. Click **Groups** to add the document to a data group. The Data Groups dialog box is displayed. Click the group to which you want to add the data and click **OK.** The Document Properties dialog box is redisplayed.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.
5. Click **Next**. The Document Properties dialog box is displayed (Figure 5-1).

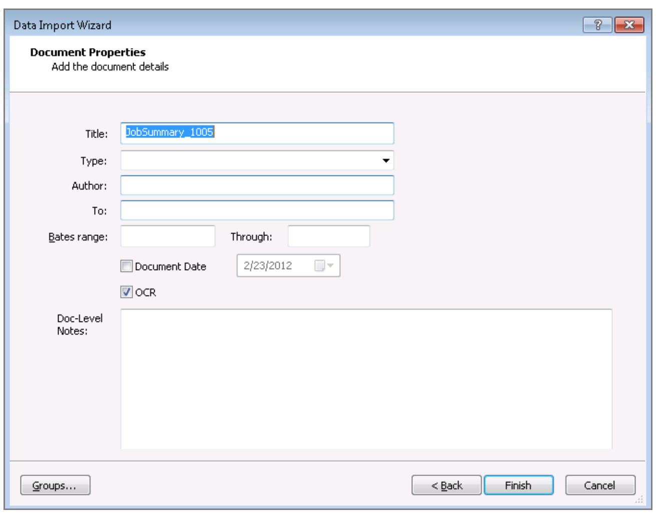


Figure 5-1. Document Properties dialog box

6. By default, the title of the document is entered for you in the **Title** box. Type a different name for the document if desired.
7. In the **Type** list, click a document type, if desired.
8. In the **Author** box, type a name or click the name in the list, if desired.
9. In the **Recipient** box, type a name or click the name in the list, if desired.
10. In the **Bates range** and **Through** boxes, type a number, if desired.
11. Select the Document Date check box, if desired. When you select this check box, the current day's date is entered in the box automatically. Click the arrow to display a calendar and click a different date, if desired.

12. The OCR check box is automatically selected if the document is an image file or PDF file.
13. In the Doc-Level Notes box, type a note, if desired. The note will be displayed in the document's Annotations folder in the left pane and on the Overview and Doc-Level Notes tabs in the Document Properties dialog box. Additionally, you can include the note text in a search. For further information, see "Adding Doc-Level Notes" on page 83.
14. Click **Finish**. The Import Completed dialog box with a list of the documents that you imported is displayed.

    Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.
15. Click **OK**. The document is listed under Documents in the left pane and the text of the document is displayed in the right pane (Figure 5-2).

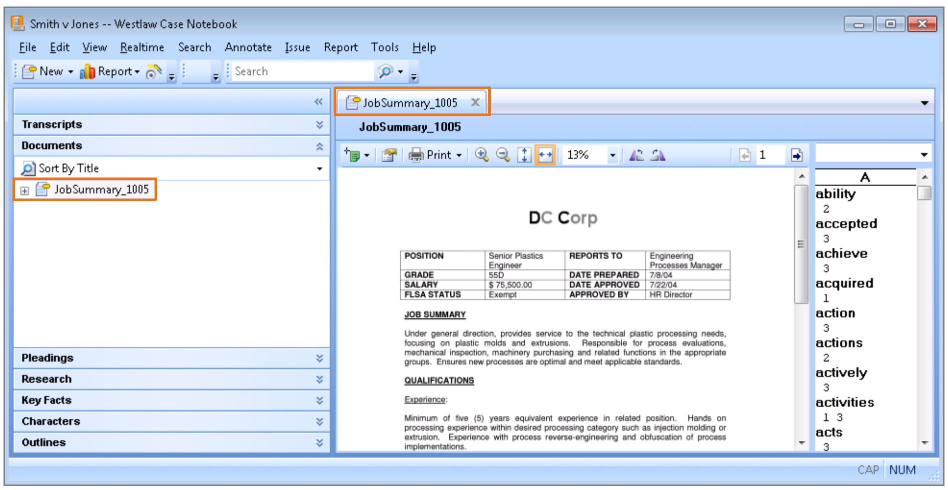


Figure 5-2. Imported document

Importing Multiple Documents

To import multiple documents, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Document (from File)** on the menu. The Document Files dialog box is displayed.

2. Click **Add** to display the Open dialog box (Figure 5-3).

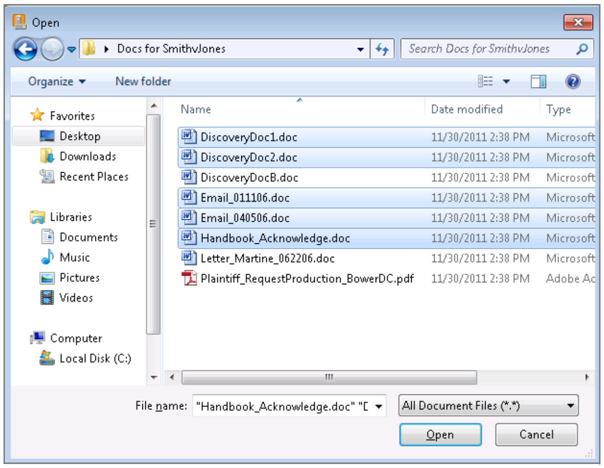


Figure 5-3. Open dialog box

3. Click your documents and click **Open**. The Document Files dialog box is redisplayed (Figure 5-4).

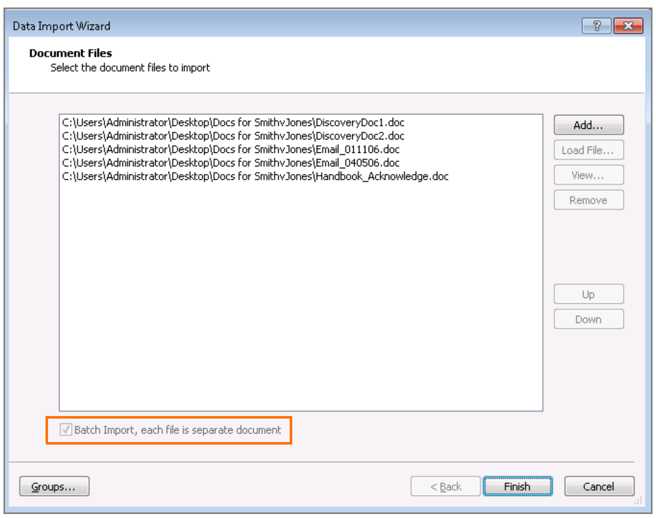


Figure 5-4. Document Files dialog box

Note For most file types, each file is imported as a separate document. For image files, you have the option of importing each file as a separate document or merging multiple files into one document. To merge multiple image files, make sure the **Batch Import, each file is separate document** check box is clear. To import each file as a separate document, select the check box.

4. Click **Groups** to add the documents to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the data and click **OK.** The Document Properties dialog box is redisplayed.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.

5. Click **Finish**. The Import Completed dialog box with a list of the documents that you imported is displayed.

Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.

6. Click **OK**. The documents are listed under Documents in the left pane and the text of the first document is displayed in the right pane.

Importing Load Files

To import a load file, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Document (from File)** on the menu. The Document Files dialog box is displayed.
2. Click **Load File** to display the Open dialog box.
3. Click your document and click **Open**. The Document Files dialog box is redisplayed.
4. Click **Groups** to add the documents to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the data and click **OK.** The Document Properties dialog box is redisplayed.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.

5. Click **Next**. The Load Files: Select the Load File Field Delimiter dialog box is displayed (Figure 5-5).

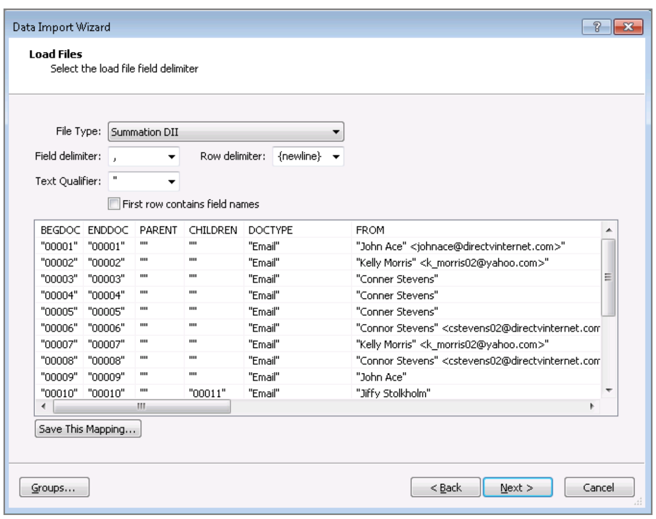


Figure 5-5. Load Files: Select the Load File Field Delimiter dialog box

6. In the **File Type** list, click the file type for the load file. 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.

   Notes

   - If your load file is not listed in the File Type list, click **Custom** in the list. Then click the appropriate field delimiter, row delimiter, and text qualifier in the lists.
   - To save the field delimiter, row delimiter, and text qualifier settings for the Custom file type, click **Save This Mapping**. In the Save Mapping dialog box, type a name for the mapping in the box and click **Save Mapping**. The name of the mapping is added to the File Type list for future use.

7. Click **Next**. The Load Files: Select the Load File Field Mappings dialog box is displayed (Figure 5-6).

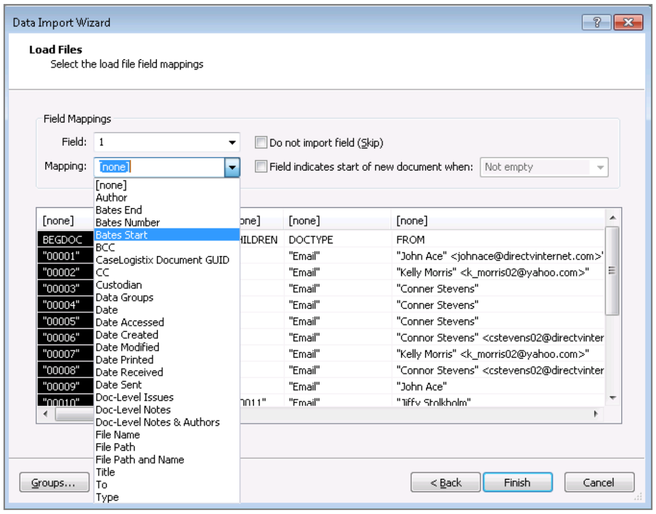


Figure 5-6. Load Files: Select the Load File Field Mappings dialog box

8. Assign a title to each field in the file by mapping the field. For example, to map the first field, which contains beginning Bates Numbers, in Figure 5-6, click the field by clicking **[none]** at the top of the first column. Then click **Bates Start** in the **Mapping** list. Repeat this process for each field you want to map.

   Note You can map the Doc-Level Notes, Doc-Level Issues, and Data Groups fields multiple times, allowing you to assign more than one column to the same field. Therefore, if the load file contains multiple columns with notes, coding, or other metadata, you can map all of them to the Doc-Level Notes, Doc-Level Issues, and Data Groups fields, and then include that data in searches and reports.

9. If you do not want to import a field, select the field and then select the **Do not import field (Skip)** check box.

10. 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 new document when** check box and click an option in the list.

11. Click **Finish**. The Import Completed dialog box with a list of the documents that you imported is displayed.

    Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.

12. Click **OK**. The documents are listed under Documents in the left pane.

Sending Documents to Case Notebook Using Windows Explorer

You can send documents that are saved on your computer to Case Notebook using Windows Explorer. To send a document using Windows Explorer, complete these steps:

1. Locate the document you want to send.

2. Right-click the document, then point to **Send To** and click **Case Notebook as Document** on the menu (Figure 5-7). The Document Properties dialog box is displayed.

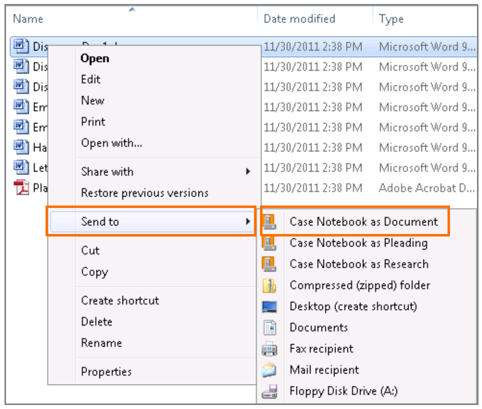


Figure 5-7. Windows Explorer menu

3. Fill in the boxes as appropriate.
4. Click **Finish**.The Import Completed dialog box with a list of the documents that you imported is displayed.

   Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.

5. Click **OK**. The document is listed under Documents in the left pane and the text of the document is displayed in the right pane.

Sending Documents to Case Notebook from Microsoft Outlook

You can send email and attached documents to Case Notebook directly from Microsoft Outlook. When you install Case Notebook, a Case Notebook menu is automatically displayed in Microsoft Outlook, shown outlined in Figure 5-8.

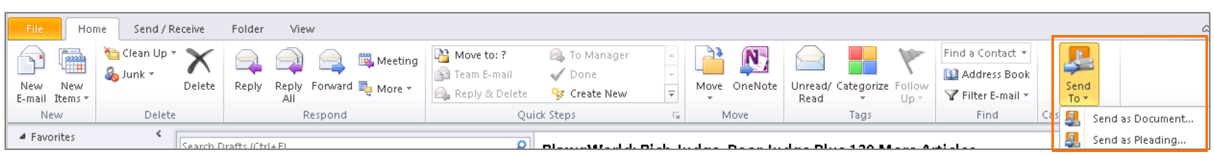


Figure 5-8. Case Notebook menu in Microsoft Outlook

To send an email and an attached document from Microsoft Outlook, complete these steps:

1. Access Microsoft Outlook.
2. You can do one of the following:
   - Click the email you want to send, then on the **Case Notebook** menu, click **Send as Document**.
   - Right-click the email and click **Send to Case Notebook as Document** on the menu.

   The Load Files dialog box is displayed.
3. Click **Groups** to add the sent documents to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the document and click **OK**.

Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.

4. Click **Finish**. The Import Completed dialog box with a list of the documents that you imported is displayed.

   Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.

5. Click **OK**. The email and attachment are listed under Documents in the left pane and the text of the email is displayed in the right pane (Figure 5-9).

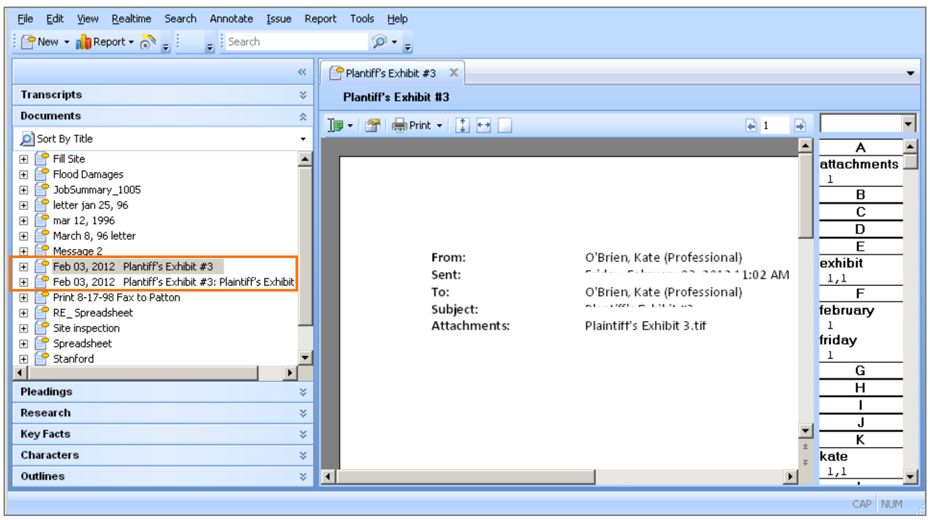


Figure 5-9. Email and attached document

Sending Documents to Case Notebook from Westlaw CaseLogistix

When you send a document from Westlaw CaseLogistix 5.4 or later, Case Notebook 3.0 or later can receive the document with its coding, Shared Tags, redactions, and notes. Additionally, some CaseLogistix fields will automatically map to comparable fields in Case Notebook, if they exist, or you can manually map CaseLogistix fields to the Data Groups, Doc-Level Issues, and Doc-Level Notes fields in Case Notebook. (For further information on these Case Notebook fields, see "Working with Properties" on page 79.)

Notes

- If a CaseLogistix field is not mapped to a Case Notebook field, the data in that field will not be available in Case Notebook. Refer to step 9 below on how to manually map a CaseLogistix field to a Case Notebook field.
- If you change information in the CaseLogistix document after you send it to Case Notebook, those changes are not reflected in the document in Case Notebook.

The following list shows how features in CaseLogistix translate into features in Case Notebook.

Westlaw CaseLogistix	Westlaw Case Notebook
Shared Tags	Doc-Level Issues
Notes	Doc-Level Notes
IntelliFolders	Data Groups
Redactions	Redactions Issues
Anchor Notes	Annotations

You can determine which CaseLogistix features you want to include in Case Notebook during the send process. See steps 2–6 below.

To send a document from CaseLogistix to Case Notebook, complete these steps:

1. Right-click the document in CaseLogistix you want to send to Case Notebook, then point to **Send To** and click **Case Notebook as Document** on the menu. The Send to Case Notebook Options dialog box is displayed (Figure 5-10).

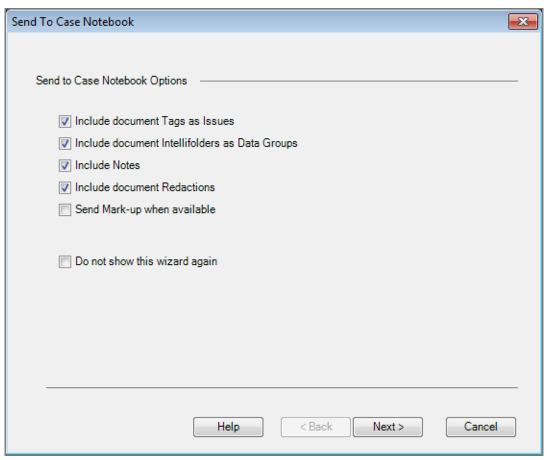


Figure 5-10. Send to Case Notebook Options dialog box

2. Select or clear the appropriate check boxes.

3. Click **Next**. The Select Tags to Send as Doc-Level Issues dialog box is displayed (Figure 5-11).

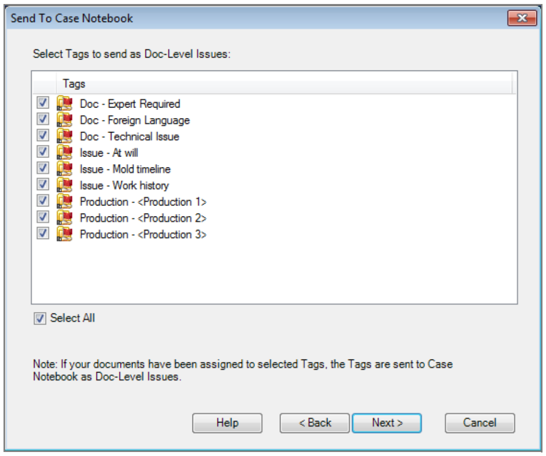


Figure 5-11. Select Tags to send as Doc-Level Issues dialog box

4. By default, all tags are selected. Clear the appropriate check boxes, if desired.
5. Click **Next**. The Select IntelliFolders to Send as Groups dialog box is displayed (Figure 5-12).

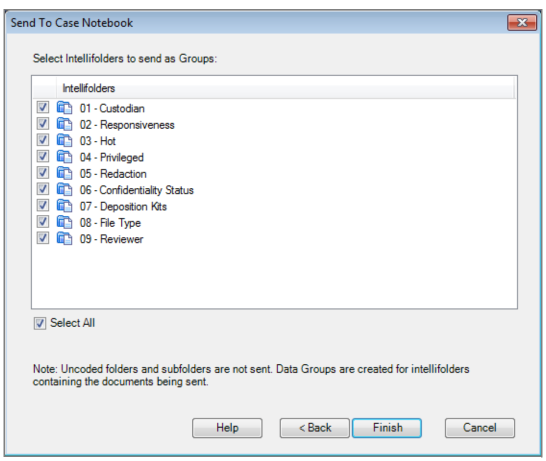


Figure 5-12. Select IntelliFolders to send as Groups dialog box

6. By default, all IntelliFolders are selected. Clear the appropriate check boxes, if desired.
7. Click **Finish**. Case Notebook opens and the Open Case dialog box is displayed.

8. Select the case into which you want to import the document and click **OK**. The Load Files dialog box is displayed (Figure 5-13).

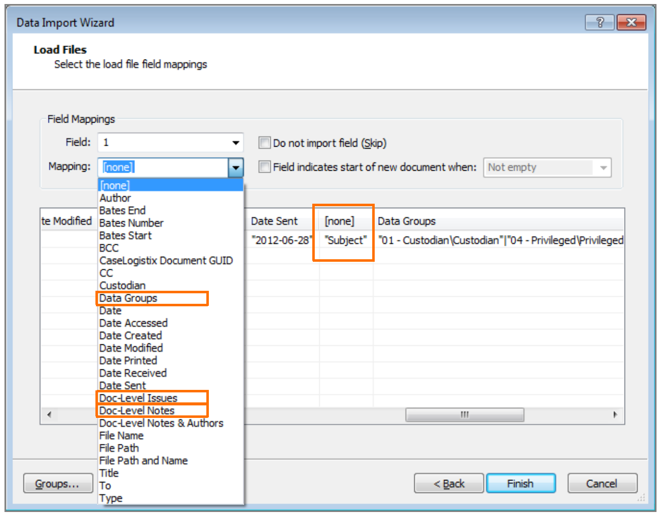


Figure 5-13. Load Files dialog box

9. Scroll through the dialog box to view all the column headings. A **[none]** column heading indicates a CaseLogistix field that was not automatically mapped to a Case Notebook field, shown outlined in Figure 5-13. If a CaseLogistix field is not mapped to a Case Notebook field, the data in that field is not available in Case Notebook. To map the field, click the **[none]** column heading, then, in the **Mappings** list, click **Data Groups**, **Doc-Level Issues**, or **Doc-Level Notes**, also shown outlined in Figure 5-13. You can map as many CaseLogistix fields to these Case Notebook fields as necessary. (For further information on the Case Notebook fields, see "Working with Properties" on page 79.)

10. When you have finished mapping the fields, click **Finish**. The Import Completed dialog box with a list of the documents that you imported is displayed.

    Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.

11. Click **OK**. The document is listed under Documents in the left pane and the text of the document is displayed in the right pane

Opening an Original CaseLogistix Document

After you send a document from CaseLogistix to Case Notebook, you can quickly access the original document in CaseLogistix from Case Notebook. To open an original CaseLogistix document, do one of the following:

- Right-click the document in the left pane and click **Properties** on the menu. The Document Properties dialog box is displayed. Click **Open in Westlaw CaseLogistix** shown outlined in Figure 5-14.

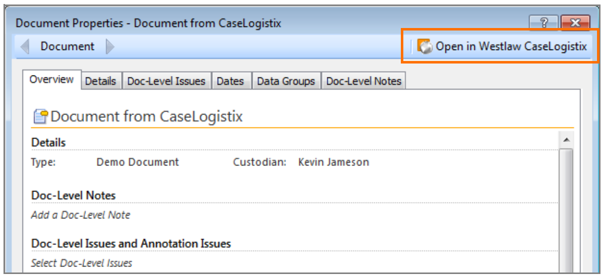


Figure 5-14. Document Properties dialog box

- Click **Documents** in the left pane to display the Document List in the right pane. Click **Columns**, then click **Open in Westlaw CaseLogistix** on the menu. The Open in Westlaw CaseLogistix column heading is added to the Document List and an icon is displayed in the column for each document you sent from CaseLogistix, shown outlined in Figure 5-15. For further information, see "Using the Document List" on page 36.

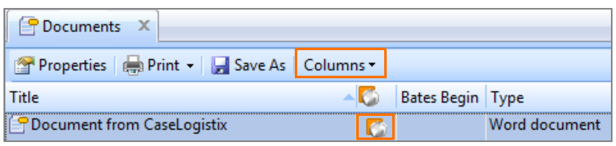


Figure 5-15. CaseLogistix document in Document List

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.

Using the Document List

When you click Documents in the left pane, the list of documents is displayed as a table in the right pane that includes document properties, e.g., Bates numbers, dates, notes, and issues (Figure 5-16).

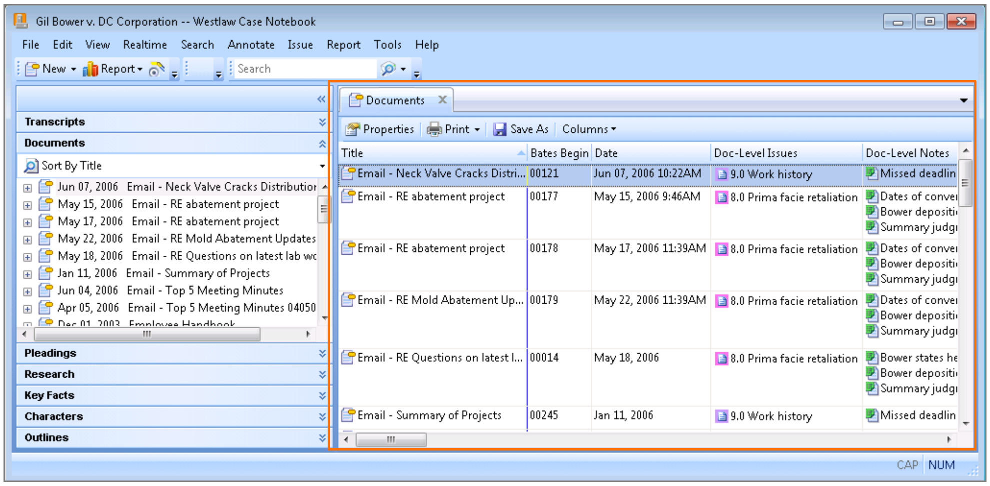


Figure 5-16. Document List

SORTING DOCUMENTS

To sort documents in the Document List, click a column heading.

ADDING AND REMOVING COLUMNS

To add or remove a column in the table, click **Columns** on the toolbar above the table, then click a column on the menu.

FREEZING THE FIRST COLUMN

To freeze the first column of the table, right-click the first column header and click **Freeze First Column** on the menu.

DELETING SINGLE AND MULTIPLE DOCUMENTS

- To delete a single document, right-click the document in the table and click **Delete** on the menu.
- To delete multiple documents, press the **Ctrl** or **Shift** key to select the documents, then right-click the selection and click **Delete** on the menu.

When you click **Delete** on the menu, the message Permanently delete the selected Document and all associated Annotations? is displayed. Click **Yes**.

Viewing Document Properties

To view the properties of a document, right-click the document name in the left pane and click **Properties** on the menu. For further information on properties, see "Working with Properties" on page 79.

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.

6 Managing Pleadings

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

Importing a Pleading

To import a pleading, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Pleading (from File)** on the menu. The Pleading Files dialog box is displayed.
2. Click **Add** to display the Open dialog box.
3. Click your pleading and click **Open**. The Pleading Files dialog box is redisplayed.
4. To add the pleading to a data group, click **Groups**. The Data Groups dialog box is displayed. Select the group to which you want to add the pleading and click **OK**. The Pleading Properties dialog box is redisplayed.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.
5. Click **Next**. The Pleading Properties dialog box is displayed (Figure 6-1).

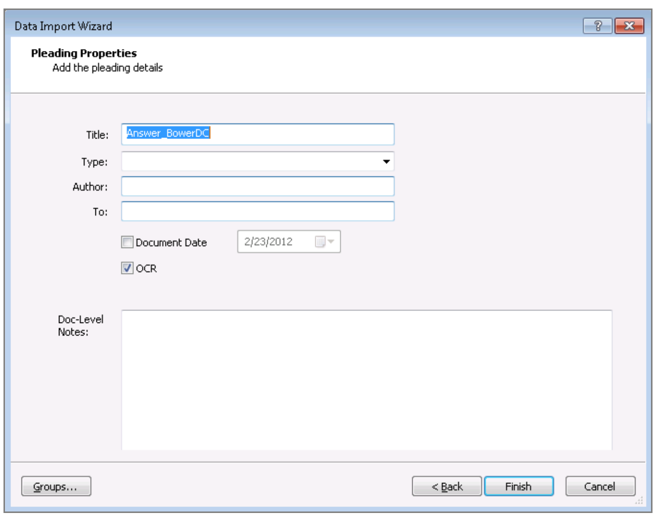


Figure 6-1. Pleading Properties dialog box

6. By default, the title of the pleading is entered for you in the **Title** box. Type a different title for the pleading, if desired.
7. In the **Type** list, click a type, if desired.
8. In the **Author** box, type the author's name or click the name in the list, if desired.
9. In the **Recipient** box, type the recipient's name or click the name in the list, 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 box automatically. Click the arrow to select another date.
11. The OCR check box is automatically selected if the pleading is an image file or PDF file.

12. In the Doc-Level Notes box, type a note, if desired. The note will be displayed in the pleading's Annotations folder in the left pane and on the Overview and Doc-Level Notes tabs in the Pleading Properties dialog box. Additionally, you can include the note text in a search. For further information, see "Adding Doc-Level Notes" on page 83.
13. Click **Finish**. The Import Completed dialog box with a list of the pleadings that you imported is displayed.

    Note If Case Notebook fails to import a pleading, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.
14. Click **OK**. The pleading is listed under Pleadings in the left pane and the text of the pleading is displayed in the right pane (Figure 6-2).

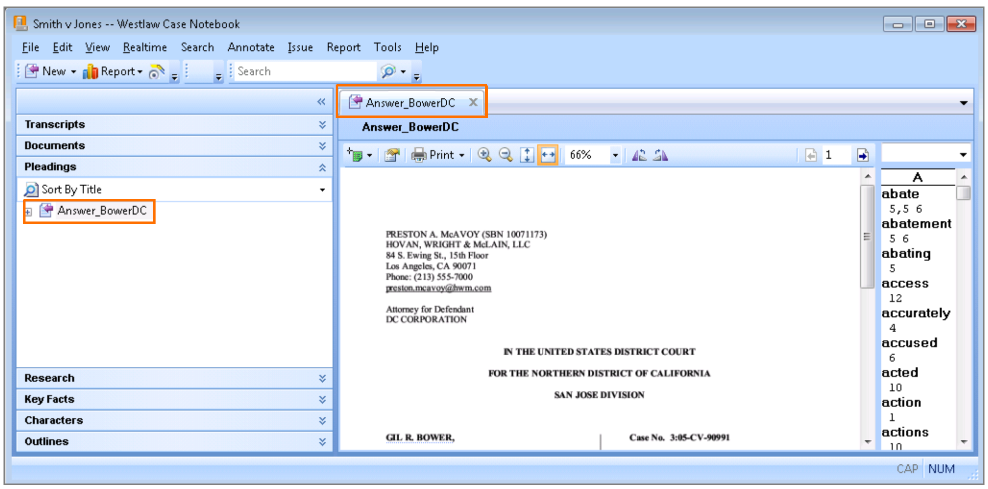


Figure 6-2. Imported pleading

Sending Pleadings to Case Notebook Using Windows Explorer

You can send pleadings that are saved on your computer to Case Notebook using Windows Explorer. To send a pleading using Windows Explorer, complete these steps:

1. Locate the pleading you want to send.
2. Right-click the pleading, then point to **Send To** and click **Case Notebook as Pleading** on the menu (Figure 6-3). The Pleading Properties dialog box is displayed.

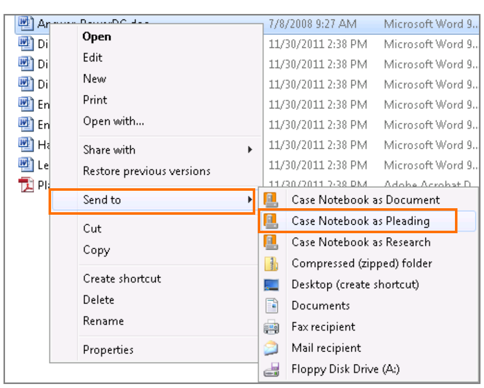


Figure 6-3. Windows Explorer menu

3. Fill in the boxes as appropriate.
4. Click **Finish**. The Import Completed dialog box with a list of the pleadings that you imported is displayed.

   Note If Case Notebook fails to import a pleading, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.
5. Click **OK**. The pleading is listed under Pleadings in the left pane and the text of the pleading is displayed in the right pane.

Sending Pleadings to Case Notebook from Microsoft Outlook

You can send email and attached pleadings to Case Notebook directly from Microsoft Outlook. When you install Case Notebook, a Case Notebook menu is automatically displayed in Microsoft Outlook (Figure 6-4).

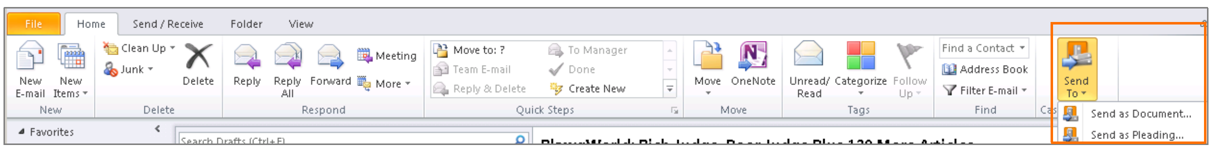


Figure 6-4. Case Notebook menu in Microsoft Outlook

To send an email and an attached pleading from Microsoft Outlook, complete these steps:

1. Access Microsoft Outlook.
2. You can do one of the following:
   - Click the email you want to send, then on the **Case Notebook** menu, click **Send as Pleading**.
   - Right-click the email and click **Send to Case Notebook as Pleading** on the menu.

   The Load Files dialog box is displayed.
3. Click **Groups** to add the sent pleadings to a data group. The Data Groups dialog box is displayed. Select the group to which you want to add the pleading and click **OK**.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.
4. Click **Finish**. The Import Completed dialog box with a list of the pleadings that you imported is displayed.

   Note If Case Notebook fails to import a pleading, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.

5. Click **OK**. The email and attachment are listed under Pleadings in the left pane and the text of the email is displayed in the right pane (Figure 6-5).

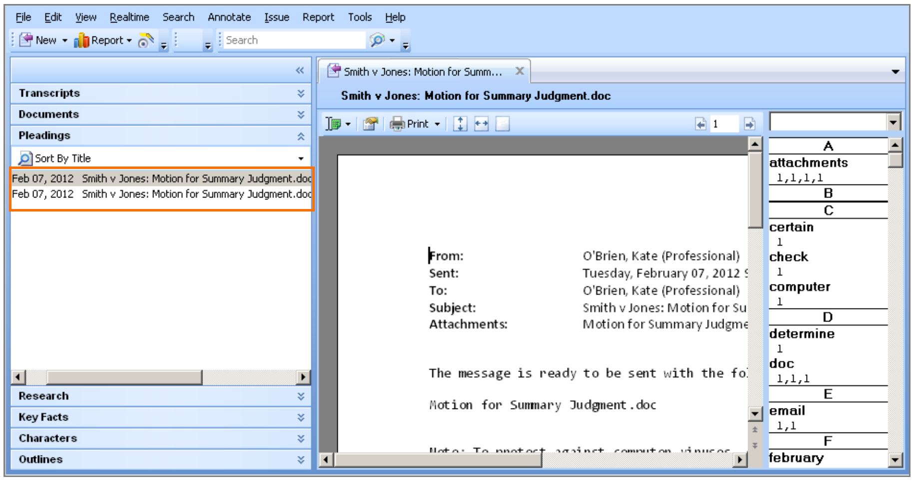


Figure 6-5. Email and attached pleading

Sending Pleadings to Case Notebook from Westlaw CaseLogistix

When you send a pleading from Westlaw CaseLogistix 5.4 or later, Case Notebook 3.0 or later can receive the pleading with its coding, Shared Tags, redactions, and notes. Additionally, some CaseLogistix fields will automatically map to comparable fields in Case Notebook, if they exist, or you can manually map CaseLogistix fields to the Data Groups, Doc-Level Issues, and Doc-Level Notes fields in Case Notebook. (For further information on these Case Notebook fields, see "Working with Properties" on page 79.)

Notes

- If a CaseLogistix field is not mapped to a Case Notebook field, the data in that field will not be available in Case Notebook. Refer to step 9 below on how to manually map a CaseLogistix field to a Case Notebook field.
- If you change information in the CaseLogistix document after you send it to Case Notebook, those changes are not reflected in the document in Case Notebook.

The following list shows how features in CaseLogistix translate into features in Case Notebook.

Westlaw CaseLogistix	Westlaw Case Notebook
Shared Tags	Doc-Level Issues
Notes	Doc-Level Notes
IntelliFolders	Data Groups
Redactions	Redactions Issues
Anchor Notes	Annotations

You can determine which CaseLogistix features you want to include in Case Notebook during the send process. See steps 2–6 below.

To send a pleading from CaseLogistix to Case Notebook, complete these steps:

1. Right-click the pleading in CaseLogistix you want to send to Case Notebook, then point to **Send To** and click **Case Notebook as Pleading** on the menu. The Send to Case Notebook Options dialog box is displayed (Figure 5-10).

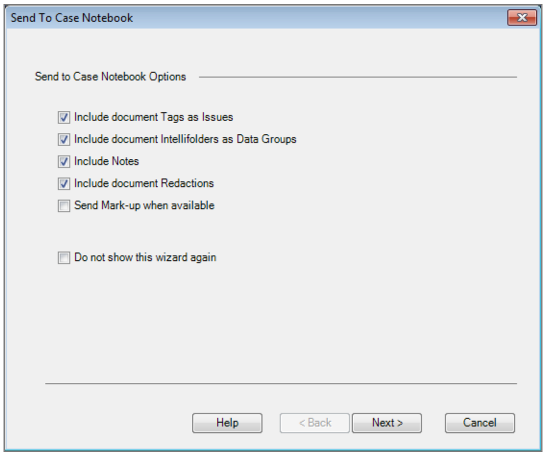


Figure 6-6. Send to Case Notebook Options dialog box

2. Select or clear the appropriate check boxes.
3. Click **Next**. The Select Tags to Send as Doc-Level Issues dialog box is displayed (Figure 5-11).

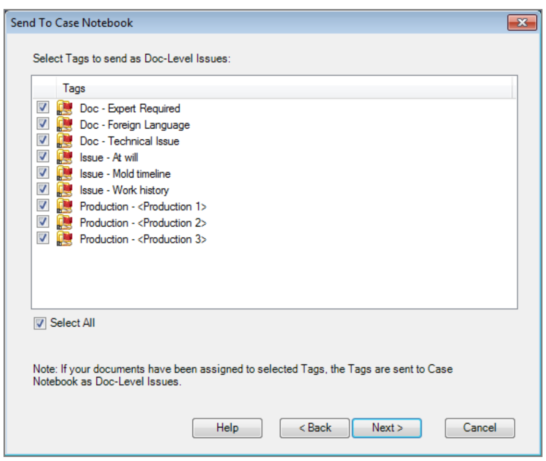


Figure 6-7. Select Tags to send as Doc-Level Issues dialog box

4. By default, all tags are selected. Clear the appropriate check boxes, if desired.

5. Click **Next**. The Select IntelliFolders to Send as Groups dialog box is displayed (Figure 5-12).

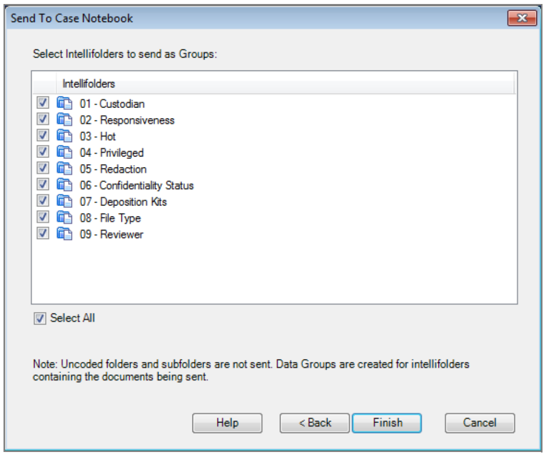


Figure 6-8. Select IntelliFolders to send as Groups dialog box

6. By default, all IntelliFolders are selected. Clear the appropriate check boxes, if desired.
7. Click **Finish**. Case Notebook opens and the Open Case dialog box is displayed.
8. Select the case into which you want to import the pleading and click **OK**. The Load Files dialog box is displayed (Figure 5-13).

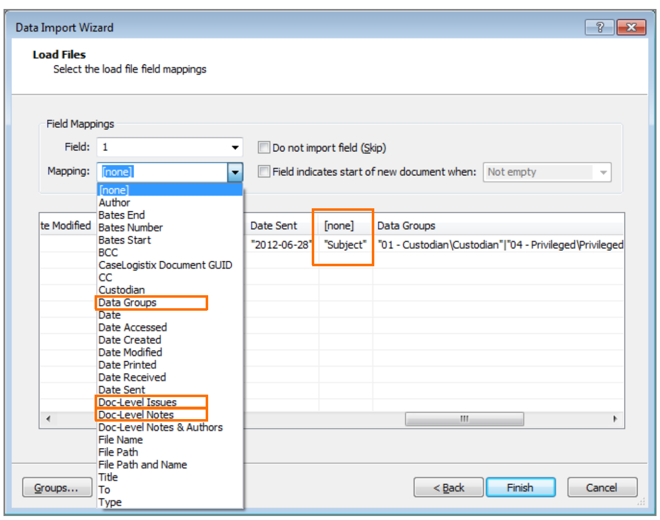


Figure 6-9. Load Files dialog box

9. Scroll through the dialog box to view all the column headings. A **[none]** column heading indicates a CaseLogistix field that was not automatically mapped to a Case Notebook field, shown outlined in Figure 5-13. If a CaseLogistix field is not mapped to a Case Notebook field, the data in that field is not available in Case Notebook. To map the field, click the **[none]** column heading, then, in the **Mappings** list, click **Data Groups**, **Doc-Level Issues**, or **Doc-Level Notes**, also shown outlined in Figure 5-13. You can map as many CaseLogistix fields to these Case Notebook fields as necessary. (For further information on the Case Notebook fields, see "Working with Properties" on page 79.)
10. When you have finished mapping the fields, click **Finish**. The Import Completed dialog box with a list of the pleadings that you imported is displayed.

Note If Case Notebook fails to import a pleading, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.

11. Click **OK**. The pleading is listed under Documents in the left pane and the text of the document is displayed in the right pane

Opening an Original CaseLogistix Pleading

After you send a pleading from CaseLogistix to Case Notebook, you can quickly access the original pleading in CaseLogistix from Case Notebook. To open an original CaseLogistix pleading, right-click the pleading in the left pane and click **Properties** on the menu. The Pleading Properties dialog box is displayed. Click **Open in Westlaw CaseLogistix**, shown outlined in Figure 5-14.

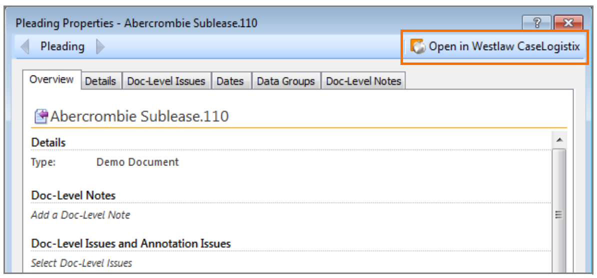


Figure 6-10. Document Properties dialog box

- Click **Documents** in the left pane to display the Document List in the right pane. Click **Columns** and click **Open in Westlaw CaseLogistix** on the menu. The Open in Westlaw CaseLogistix column heading is added to the Document List and an icon is displayed in the column for each document you sent from CaseLogistix, shown outlined in Figure 5-15. For further information, see "Using the Document List" on page 36.

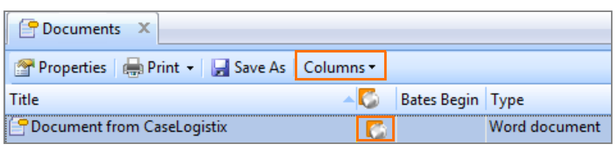


Figure 6-11. CaseLogistix document in Document List

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.

Viewing Pleading Properties

To view the properties of a pleading, right-click the pleading name in the left pane and click **Properties** on the menu. For further information on properties, see "Working with Properties" on page 79.

Deleting a Pleading

To delete a pleading, right-click the pleading in the left pane and click **Delete** on 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.

7 Managing Research

If you are conducting research on Westlaw or WestlawNext, you can send your search result to Case Notebook. From Case Notebook, you can quickly update KeyCite information and access Westlaw or WestlawNext to conduct further research.

Searching Westlaw

For more information on using Westlaw, download a free copy of the *Westlaw User Guide* at store.westlaw.com/support/user-guide/westlaw.

To search Westlaw, complete these steps:

1. On the **Search** menu in Case Notebook, click **Westlaw Search**. The Westlaw Search Options dialog box is displayed (Figure 7-1).

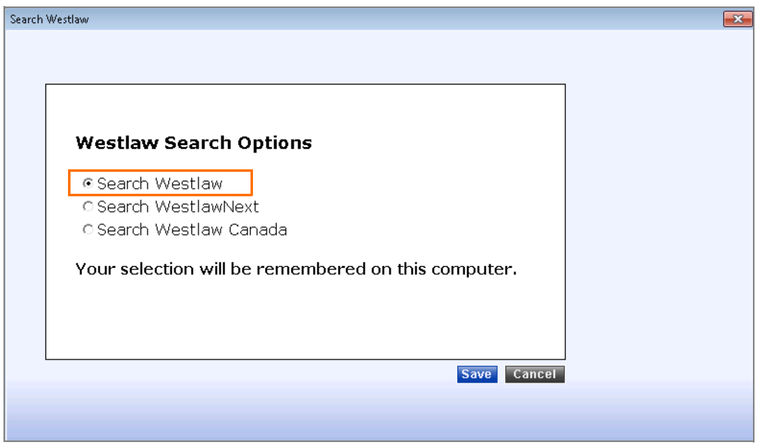


Figure 7-1. Westlaw Search Options dialog box

2. By default, Search Westlaw is selected. To search Westlaw Canada, select **Search Westlaw Canada**. Click **Save**. The Search Westlaw dialog box is displayed (Figure 7-2).

Note When you click **Save**, your preference is stored as a cookie in your browser. To view the options again, you must first delete cookies from your browser, then repeat step 1.

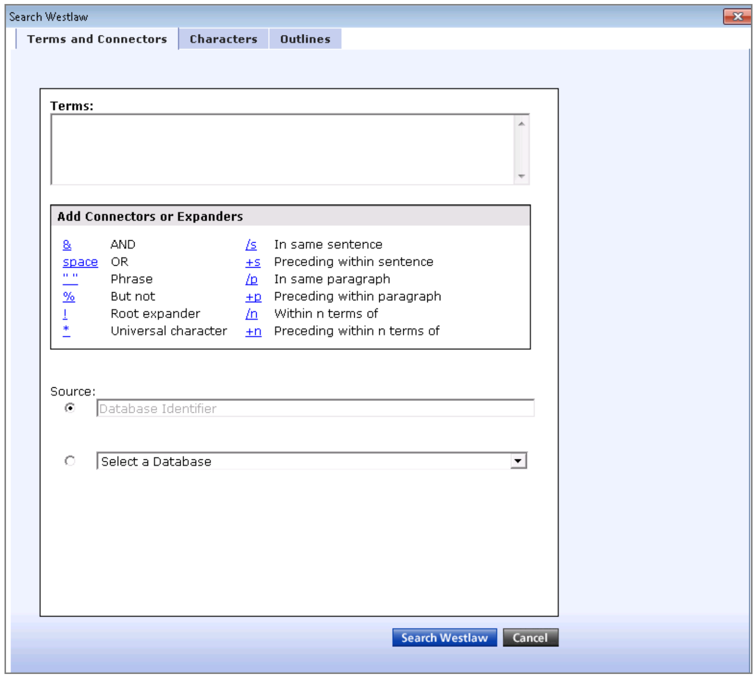


Figure 7-2. Search Westlaw dialog box

3. By default, the Terms and Connectors tab is displayed. Type your Terms and Connectors query, e.g., **retaliat! wrongful! /5 terminat! discharg! /s work! /5 compensat! & da(aft 2006)**, in the **Terms** box.
4. Under Source, type a database identifier in the box or click a database, e.g., **All Federal Cases (ALLFEDS)**, in the list.
5. Click **Search Westlaw**. The Sign On with OnePass page is displayed.
6. Type your OnePass username, password, and client identifier in the boxes.
7. Click **Sign On**. The result list for your search is displayed (Figure 7-3).

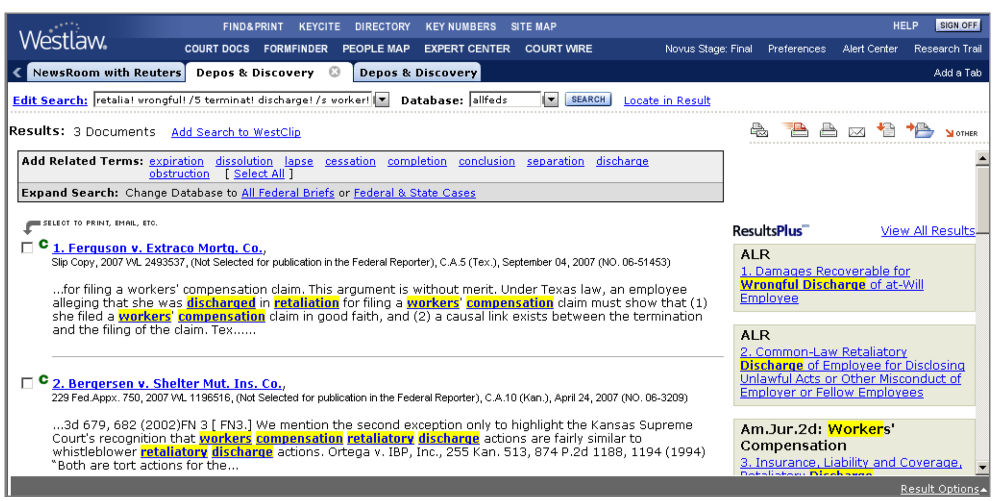


Figure 7-3. Result list

USING WESTLAW FIND & PRINT

You can use the Westlaw Find & Print feature to retrieve documents by citation and send them directly to Case Notebook. To send documents to Case Notebook, complete these steps:

1. Click **Find&Print** at the top of any page to display the Find a Document page (Figure 7-4).

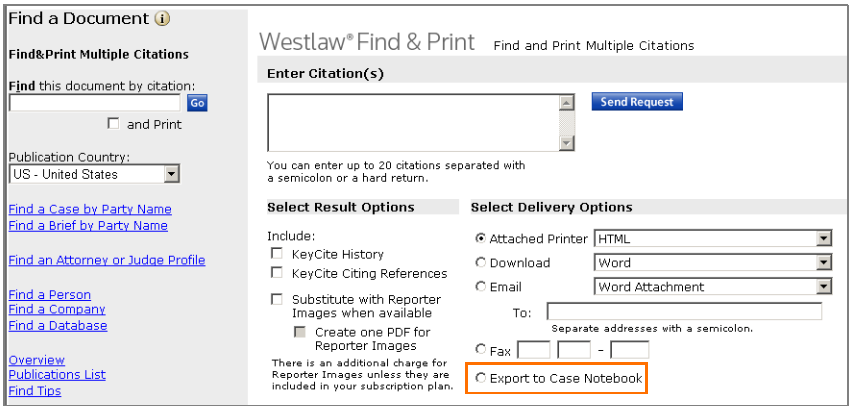


Figure 7-4. Find a Document page

2. In the **Enter Citation(s)** box in the right frame, type one or more citations. You can type up to 20 citations; separate them with a semicolon or hard return.
3. Under Select Delivery Options, click **Export to Case Notebook**.
4. Click **Send Request**. The Export to Case Notebook dialog box is displayed.
5. Complete steps 2–10 below to view the documents in Case Notebook.

SENDING A SEARCH RESULT TO CASE NOTEBOOK

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

1. To send the result list, click the **Export to Case Notebook** icon ( ) in the upper-right corner. To send specific documents in the result list, select the check box next to each document you want to send and then click the **Export to Case Notebook** icon. The Export to Case Notebook page is displayed (Figure 7-5).

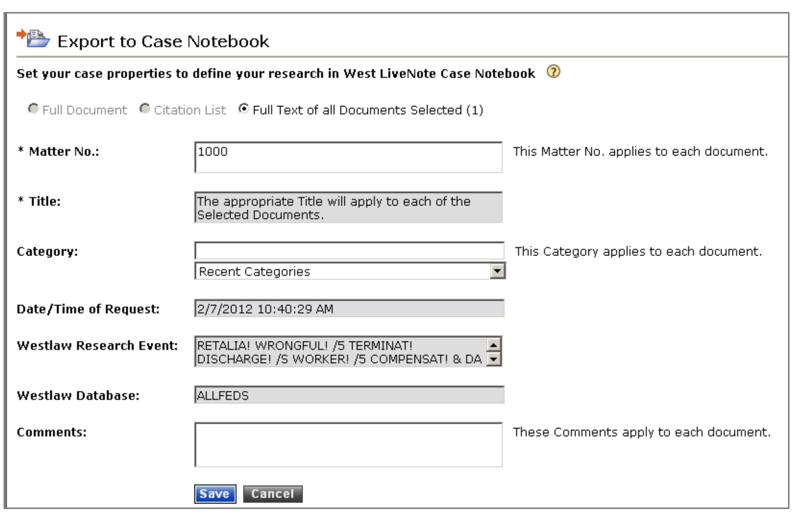


Figure 7-5. Export to Case Notebook page

2. Make certain the matter number corresponds to the client-matter number for the case in Case Notebook. (To view the client-matter number for the case, click **Case Properties** on the **File** menu in Case Notebook.)
3. Click an issue in the **Recent Categories** list, if desired.
4. In the **Comments** box, type a comment, 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.
8. To add the document to a data group, click **Groups**. The Data Groups dialog box is displayed. Select the group to which you want to add the document and click **OK**. The Research Files dialog box is redisplayed.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.
9. Click **Finish**. The Import Completed dialog box with a list of the documents that you imported is displayed.

   Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.
10. Click **OK**.The result list or documents you selected are listed under Research in the left pane and the result list or the text of the first document is displayed in the right pane (Figure 7-6).

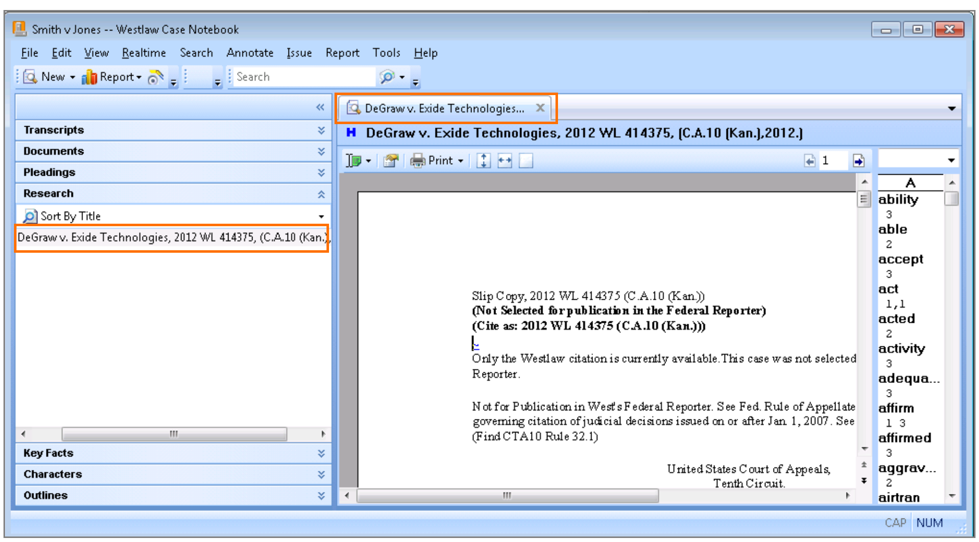


Figure 7-6. Imported research document

Searching WestlawNext

For further information on WestlawNext, download a free copy of *Welcome to WestlawNext: Introducing the Basics* at store.westlaw.com/support/user-guide/westlaw.

To search WestlawNext, complete these steps:

1. On the **Search** menu in Case Notebook, click **Westlaw Search**. The Westlaw Search Options dialog box is displayed (Figure 7-7).

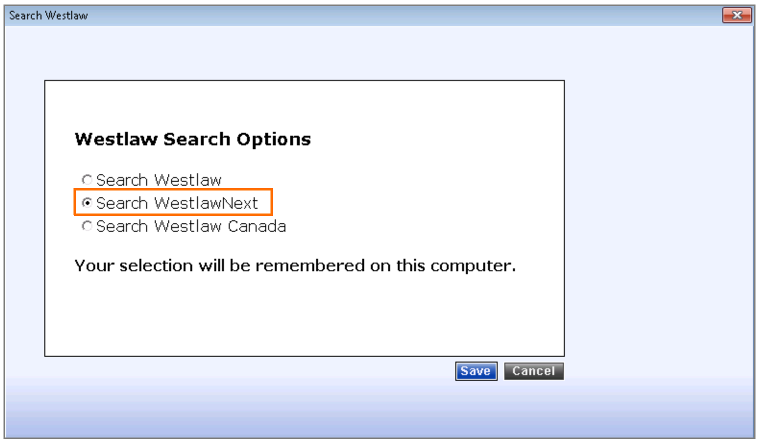


Figure 7-7. Westlaw Search Options dialog box

2. Click **Search WestlawNext**.
3. Click **Save**. The Jurisdiction dialog box is displayed (Figure 7-8).

   Notes

   - When you click **Save**, your preference is stored as a cookie in your browser. To view the options again, you must first delete cookies from your browser, then repeat step 1.
   - You can search Westlaw from Case Notebook, even if you selected WestlawNext as your default search method. To search Westlaw, open an outline, then click the **Insert** button and click **Insert**

Westlaw Outline on the menu. At the Search Westlaw dialog box, click the **Terms and Connectors** tab.

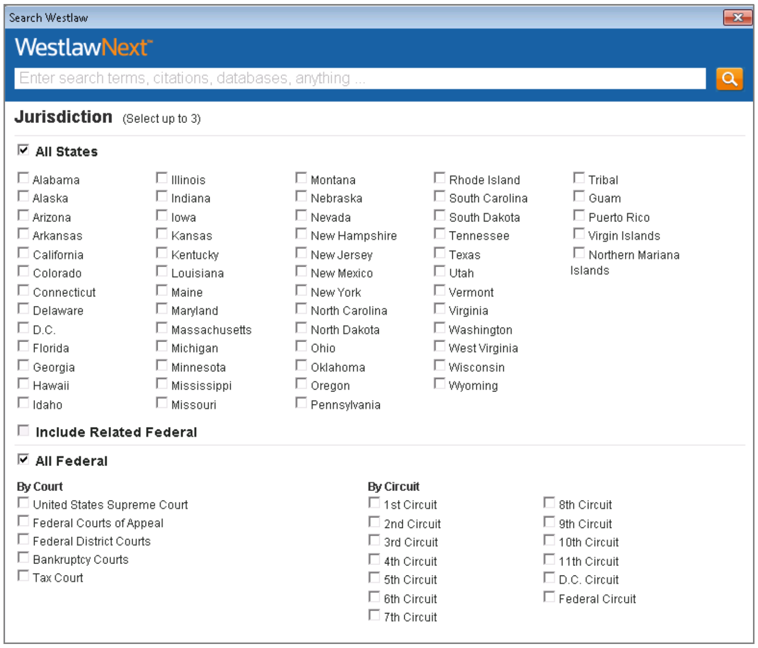


Figure 7-8. Search Westlaw dialog box

4. In the search box, type terms describing your issue.
5. Select up to three jurisdictions under Jurisdiction.
6. Click the **search** icon ( ). The WestlawNext sign-on page is displayed.
7. Type your OnePass username and password in the boxes.
8. Click **Sign On**. The client ID page is displayed
9. At the next page, click **Continue**. unless you want to change your client ID. The result list for your search is displayed (Figure 7-9).

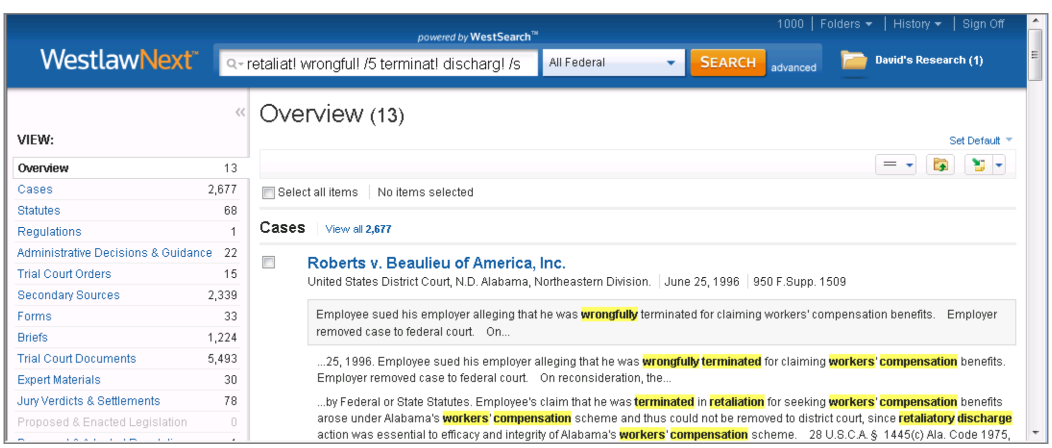


Figure 7-9. Result list

SENDING A WESTLAWNEXT RESEARCH DOCUMENT TO CASE NOTEBOOK

After conducting your research on WestlawNext, you can send the full text of a document to Case Notebook. Additionally, if you add annotations to a research result, you can send the annotations with the document to Case Notebook To send a document to Case Notebook, complete these steps:

1. Click the arrow next to the delivery icon and click **Export to Case Notebook** on the menu. The Export to The Export to Case Notebook dialog box is displayed (Figure 7-10).

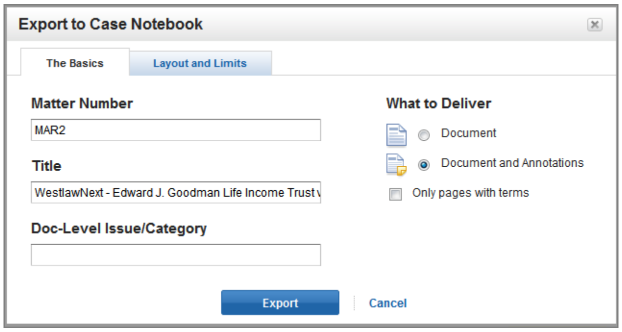


Figure 7-10. Export to Case Notebook dialog box

2. Make certain the matter number corresponds to the client-matter number for the case in Case Notebook. (To view the client-matter number for the case, click **Case Properties** on the **File** menu in Case Notebook.)
3. Type a different title in the **Title** box, if desired.
4. In the **Doc-Level Issue/Category** box, type text that will become a Doc-Level Issue in Case Notebook, if desired. You can use Doc-Level Issues to categorize your research in Case Notebook and include them in reports. For further information, see "Adding Doc-Level Issues" on page 80.
5. The What to Deliver options are displayed if your research document contains notes or highlights. You must select **Document and Annotations** for WestlawNext notes and highlights to become annotations in Case Notebook. For further information, see "Viewing WestlawNext Annotations in Case Notebook" on page 52
6. Click the **Layout and Limits** tab to specify elements you want to include with the document.
7. Click **Export**. The Ready For Download dialog box is displayed.
8. Click **Download**. The File Download dialog box is displayed.
9. Click **Open**. The Research Files dialog box is displayed.
10. Click **Finish**. The Import Completed dialog box with a list of the documents that you imported is displayed.

    Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.
11. Click **OK**. The WestlawNext document you sent is listed under Research in the left pane and the text of the document is displayed in the right pane.

VIEWING WESTLAWNEXT ANNOTATIONS IN CASE NOTEBOOK

Viewing your annotations in Case Notebook depends on how you created them in WestlawNext (Figure 7-11). The following chart describes the methods of creating an annotation in WestlawNext and how it is viewed in Case Notebook:

Creating the Annotation in WestlawNext	Viewing the Annotation in Case Notebook
Click the **Annotations** icon ( ) above the document and click **Add Note** on the menu. Type a note in the **Note** box and click **Save**. This creates a Doc-Level Note in Case Notebook.	• Open the **Annotations** folder in the left pane under the document, then click the plus symbol (**+**) next to the Doc-Level folder. • Right-click the document in the left pane and click **Properties** on the menu. The note is displayed on the Overview and Doc-Level Notes tabs in the Research Properties dialog box.
Select text in the document and click **Highlight** on the menu. This creates an annotation in Case Notebook.	1. Open the **Annotations** folder in the left pane under the document, 2. Click the plus symbol (**+**) next to Unassigned. 3. Double-click the annotation to jump to the highlighted text in the document.
Select text in the document and click **Add a Note** on the menu. Type a note in the box and click **Save**. This creates an annotation and an annotation note in Case Notebook.	1. Open the **Annotations** folder in the left pane under the document, 2. Click the plus symbol (**+**) next to Unassigned. 3. Right-click the annotation and click **Edit Annotation** on the menu. 4. Click the **Note** tab in the Annotation Properties dialog box.

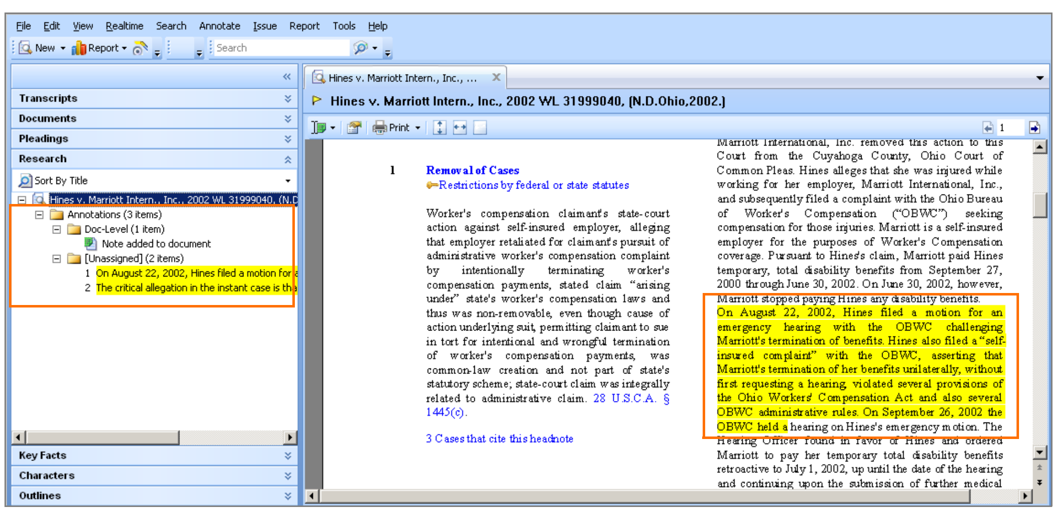


Figure 7-11. WestlawNext document with annotations

Updating KeyCite Information

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

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

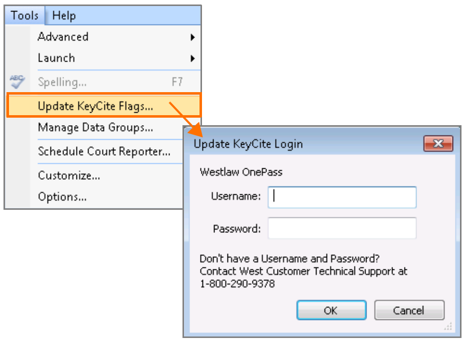


Figure 7-12. Update KeyCite Login dialog box

2. Type your OnePass username and password in the boxes and click **OK**.
3. The Update KeyCite Report is listed under Report in the left pane and the text of the report is displayed in the right pane (Figure 7-13).

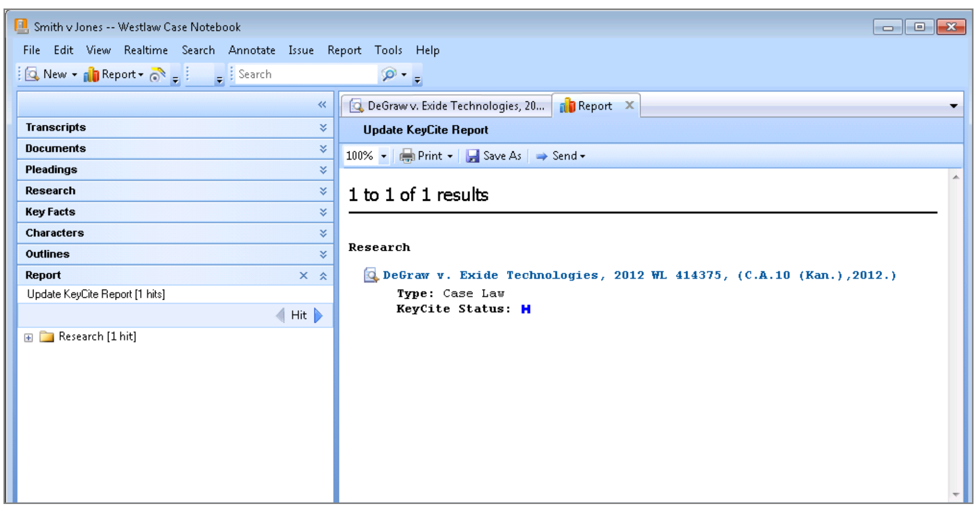


Figure 7-13. Update KeyCite Report

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

Sending Research Documents to Case Notebook Using Windows Explorer

You can send research documents that are saved on your computer to Case Notebook using Windows Explorer. To send a research document using Windows Explorer, complete these steps:

1. Locate the research document you want to send.

2. Right-click the research document, then point to **Send To** and click **Case Notebook as Research** on the menu (Figure 6-3). The Research Properties dialog box is displayed.

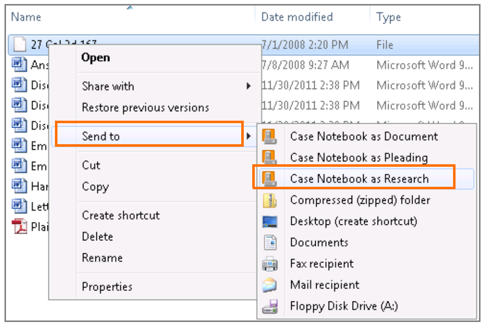


Figure 7-14. Windows Explorer menu

3. Fill in the boxes as appropriate.
4. Click **Finish**. The Import Completed dialog box with a list of the documents that you imported is displayed.

   Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.

5. Click **OK**. The research document is listed under Research in the left pane and the text of the research document is displayed in the right pane.

Importing Research Documents

You can import other research documents into Case Notebook.

To import a research document, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Research (from File)** on the menu. The Research Files dialog box is displayed.
2. Click **Add** to display the Open dialog box.
3. Click your research document and click **Open**. The Research Files dialog box is redisplayed.
4. To add the document to a data group, click **Groups**. The Data Groups dialog box is displayed. Select the group to which you want to add the document and click **OK**. The Research Files dialog box is redisplayed.

   Note You can use data groups to organize data in categories, which are displayed as folders under data categories in the left pane. For more information on data groups, see "Working with Data Groups" on page 104.

5. Click **Next**. The Research Properties dialog box is displayed (Figure 7-15).

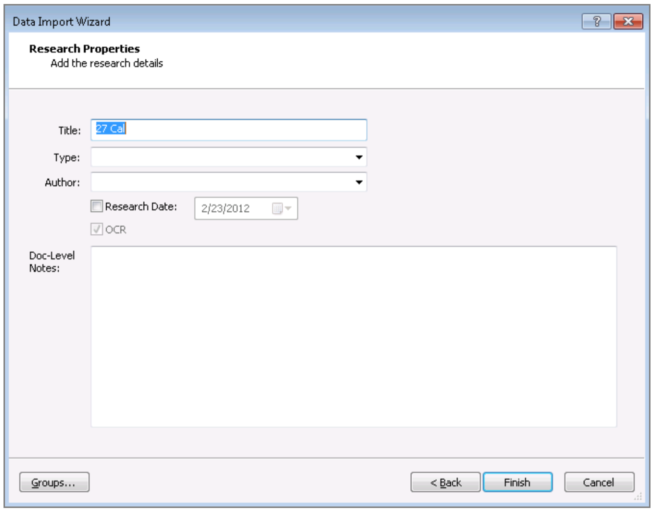


Figure 7-15. Research Properties dialog box

6. By default, the title of the document is entered in the **Title** box. Type a different title, if desired.
7. In the Type list, click a document type, if desired.
8. In the Author list, click an author, 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 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 file.
11. In the Doc-Level Notes box, type a note, if desired. The note will be displayed in the research document's Annotations folder in the left pane and on the Overview and Doc-Level Notes tabs in the Research Properties dialog box. Additionally, you can include the note text in a search. For further information, see "Adding Doc-Level Notes" on page 83.
12. Click **Finish**. The Import Completed dialog box with a list of the documents that you imported is displayed.

    Note If Case Notebook fails to import a document, an error message is displayed in the dialog box. You can record the error by clicking **Copy to Clipboard** and pasting the message into another application.
13. Click **OK**. The research document is listed under Research in the left pane and the text of the document is displayed in the right pane.

8 Managing Key Facts

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. On the **Main Menu** toolbar, click the **New** arrow, then click **Key Fact** on the menu. The Key Fact Properties dialog box–Details tab is displayed (Figure 8-1).

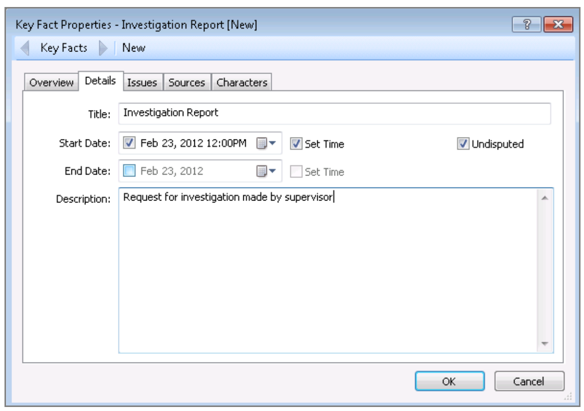


Figure 8-1. Key Fact Properties dialog box–Details tab

2. On the Details tab,
   - in the **Title** box, type a name for the key fact, e.g., **Investigation Report**.
   - 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 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.
   - select the **Set Time** check box, if desired. If you have not previously created any key facts, 12:00PM is entered in the box automatically. Otherwise, the start time of the last key fact you created is entered. Type a different start time, if desired.
   - 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 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.
   - select the **Set Time** check box, if desired. If you have not previously created any key facts, 12:00PM is entered in the box automatically. Otherwise, the end time of the last key fact you created is entered. Type a different end time, if desired.
   - in the **Description** box, type a description, e.g., **Request for investigation made by supervisor**.
   - clear the **Undisputed** check box, if desired.
3. 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 86.
4. 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 91.

5. 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 61.
6. Click the **Overview** tab to review your selections, if desired (Figure 8-2).

Note You can click any item on the Overview tab to display the appropriate tab, where you can edit the information.

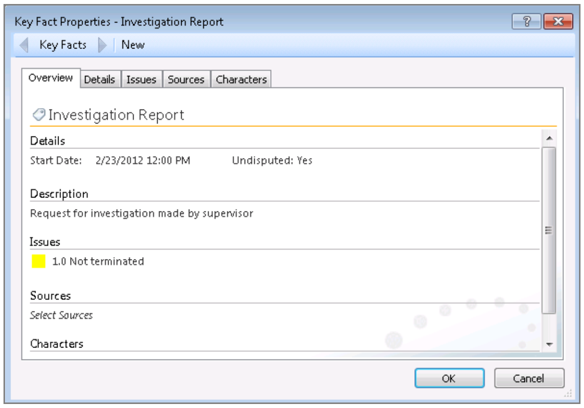


Figure 8-2. Key Fact Properties dialog box–Overview tab

7. Click **OK**. The key fact is listed under Key Facts in the left pane and displayed on the Key Facts tab in the right pane (Figure 8-3).

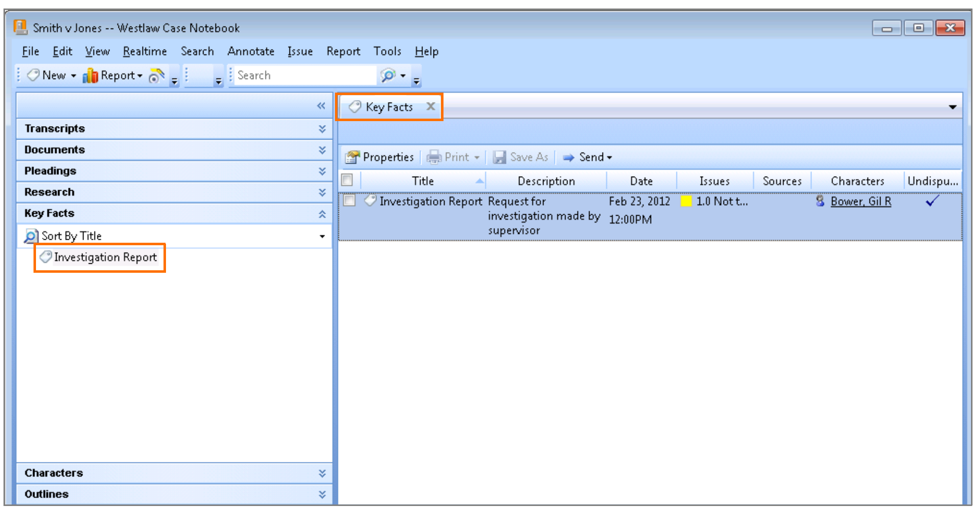


Figure 8-3. Key Facts tab

Creating a Key Facts Report

To create a Key Facts report, complete these steps:

1. On the **Main Menu** toolbar, click the **Report** button (Report), then click **Key Facts** on the menu. The Key Facts Report Properties dialog box is displayed (Figure 8-4).

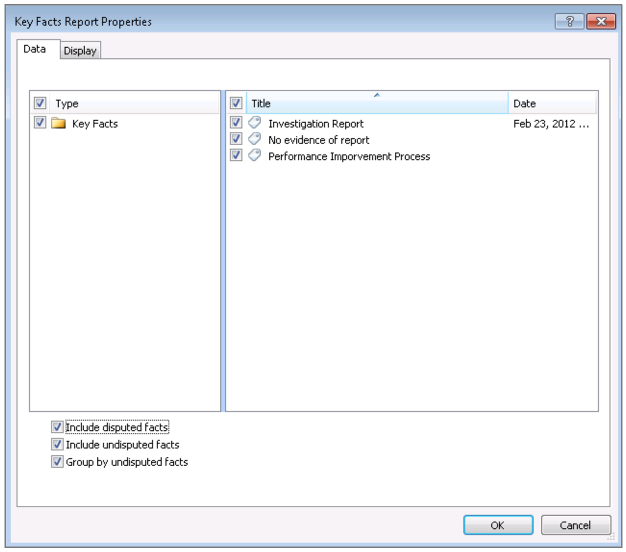


Figure 8-4. Key Facts Report Properties dialog box

2. All of the key facts in the case are selected on the Data tab by default. To remove a key fact from the report, clear its check box.
3. Clear the **Include disputed facts** check box if you want to exclude disputed facts from the report and create an undisputed facts report.
4. Clear the **Include undisputed facts** check box if you want to exclude undisputed facts from the report and create a disputed facts report.
5. Clear the **Group by undisputed facts** check box if you do not want to group undisputed facts in the report to create a report with undisputed and disputed facts grouped together.
6. Click the **Display** tab to view a list of display options. You can
   - in the **Title** box, type a title for the report, if desired.
   - by default, the key facts are sorted by Title in the report; click **Date** in the **Sort By** list, if desired.
   - select or clear the appropriate check boxes under Key Facts.
   - select the **Include cover page when printing or saving** check box, if desired.

7. Click **OK**. The Key Facts report is listed under Report in the left pane and the text of the report is displayed on the Report tab in the right pane (Figure 8-5).

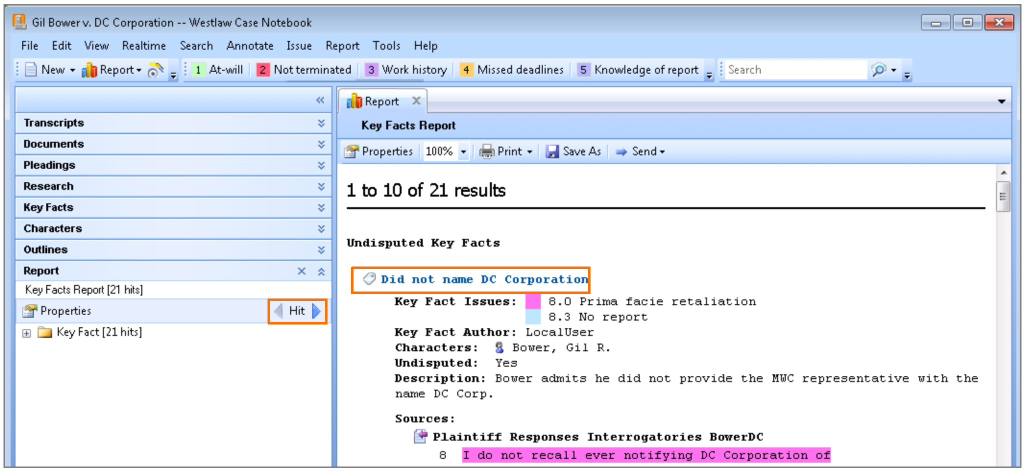


Figure 8-5. Key Facts report

When viewing the report, you can

- click the heading next to a key fact icon in the report to go to the key fact on the Key Facts tab.
- click the **Hit** arrows in the left pane to view the next or previous key fact in the report.

Editing a Key Fact

To edit a key fact, right-click the key fact and click **Properties** on 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 click **Delete** on 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.

Sending Key Facts to Microsoft Word or Corel WordPerfect

You can send key facts to Microsoft Word or Corel WordPerfect and then work with them in that word-processing program. To send key facts to a Microsoft Word or Corel WordPerfect, select the check boxes next to the key facts you want to send. Then click **Send** on the toolbar above the key facts in the right pane and click **Word** or **WordPerfect** on the menu. The program you selected opens and the key facts are displayed in a document.

Sending Key Facts to West Case Timeline

You can send key facts to West Case Timeline and use them to create a chart. For more information on West Case Timeline, refer to the *West Case Timeline User Guide*, which you can download at store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.

To send key facts to West Case Timeline, complete these steps:

1. Select the check boxes next to the key facts you want to send.

2. Click **Send** on the toolbar above the key facts in the right pane, then click **West Case Timeline** on the menu.
3. The message Would you like to view import results? is displayed. Click **Yes** if you want to display a dialog box summarizing the results of the import.
4. If you clicked **Yes** in step 3, the Import_log.txt–Notepad dialog box is displayed. Click the **Close** button. The key facts are displayed as events on the Event Entry tab in West Case Timeline.

Notes

- If West Case Timeline is not open when you send the key facts, West Case Timeline opens automatically and creates a new timeline file for you. If you are working in one or more timelines when you send the key facts, the key facts are displayed in the last timeline you accessed.
- If you modify a key fact in Case Notebook, you must resend the key fact to West Case Timeline to update the event. Only the modified information in the key fact is sent from Case Notebook.

SAVING KEY FACTS AS A WEST CASE TIMELINE FILE

If desired, you can also save your key facts as a West Case Timeline (TAB) file and then import the file into West Case Timeline.

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

1. Click **Save As** above the key facts in the right pane. The Save As dialog box is displayed.
2. Click a location for the West Case Timeline file.
3. In the **File name** box, type a file name.
4. In the **Save as type** list, click **West Case Timeline (*.tab)**.
5. Click **Save**.

9 Managing Characters

With 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.

Adding Characters

You can add characters to a case manually, set Case Notebook to add characters automatically, or add characters from a smart tags list.

To add characters manually, you can

- create a character
- import characters from a comma separated value (CSV) file

Case Notebook can add characters automatically when you

- enter or change the properties in a transcript, document, pleading, or outline
- import transcripts, documents, or pleadings

ADDING CHARACTERS MANUALLY

Creating a Character

To create a character, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Character** on the menu. The Character Properties dialog box is displayed (Figure 9-1).

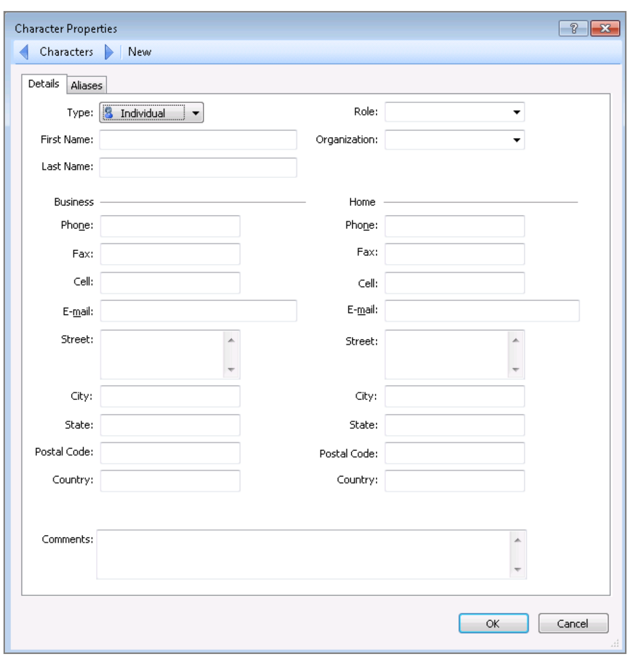


Figure 9-1. Character Properties dialog box

2. Fill in the boxes as appropriate.

3. Click **OK**. The character is listed under Characters in the left pane and displayed on the Characters tab in the right pane (Figure 9-2).

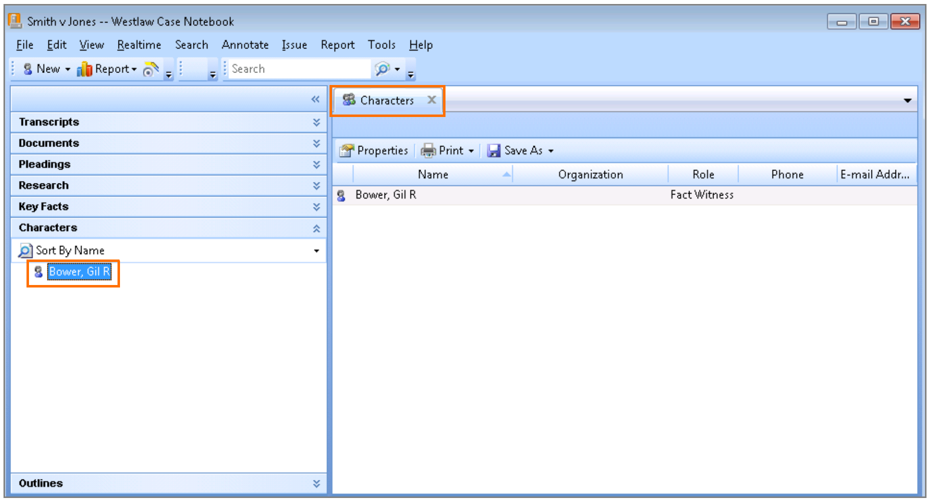


Figure 9-2. Characters tab

Importing Characters from a CSV File

You can import a CSV file that contains information about characters. If desired, you can create a CSV file by exporting characters from Case Notebook or contacts from Microsoft Outlook. For further information on exporting characters from Case Notebook, see "Exporting Characters to a File" on page 67.

Note The CSV file must contain the same fields as those for contacts in Microsoft Outlook.

To import characters from a CSV file, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Characters (from File)** on the menu. The Open dialog box is displayed.
2. Select the file containing the characters you want to import and click **Open**. A message indicating that the characters were successfully imported or updated is displayed.
3. Click **OK**. The characters are listed under Characters in the left pane and displayed on the Characters tab in the right pane.

ADDING CHARACTERS AUTOMATICALLY

Changing the Properties of Transcripts, Documents, Pleadings, and Outlines

Case Notebook automatically adds characters when you add or change the name of a deponent in a transcript or outline or the author or recipient in a document or pleading.

To change the deponent, author, or recipient information, complete these steps:

1. Right-click the transcript, document, pleading, or outline you want to change in the left pane, then click **Properties** on the menu. The Properties dialog box is displayed.
2. Click the **Details** tab.
3. Make the changes in the appropriate boxes.
4. Click **OK**. The character is listed under Characters in the left pane.

If you do not want Case Notebook to add a character when you change the information in a transcript, document, pleading, or outline, complete these steps:

1. On the **Tools** menu, click **Options**. The Options dialog box is displayed.

2. Click the **Characters** tab (Figure 9-3).

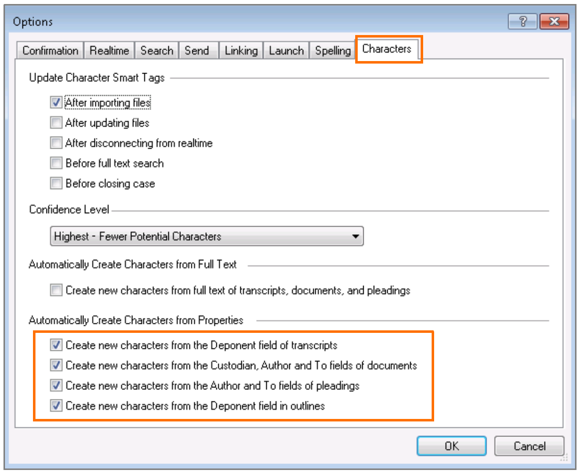


Figure 9-3. Options dialog box–Characters tab

3. Under Automatically Create Characters from Properties, clear the appropriate check box.
4. Click **OK**.

Importing Transcripts, Documents, and Pleadings

When you import a transcript, document, or pleading, Case Notebook scans the text and identifies the words that appear to be the names of persons or companies. You can set Case Notebook to automatically add those names as characters to a case. To set Case Notebook to automatically add characters when you import a transcript, document, or pleading, complete these steps:

1. On the **Tools** menu, click **Options**. The Options dialog box is displayed.
2. Click the **Characters** tab (Figure 9-4).

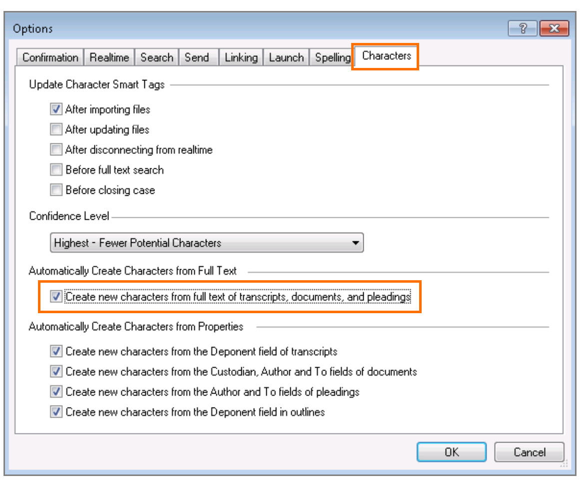


Figure 9-4. Options dialog box–Characters tab

3. Under Automatically Create Characters from Full Text, select the **Create new characters from full text of transcripts, documents, and pleadings** check box.
4. Click **OK**.

ADDING CHARACTERS FROM A SMART TAGS LIST

When you import a transcript, document, or pleading, Case Notebook uses character recognition software to identify words that appear to be the names of persons or companies. It then adds smart tags, or links to the character information, to those names and generates a list of the smart tags. You can use the list to find references to additional witnesses and specify the characters you want to add to the case.

Characters with smart tags are underlined with a blue dotted line, shown outlined in Figure 9-5. You can right-click a smart tag to

- modify a character’s information
- delete the smart tag
- create a Character report
- retrieve a character’s profile on Westlaw

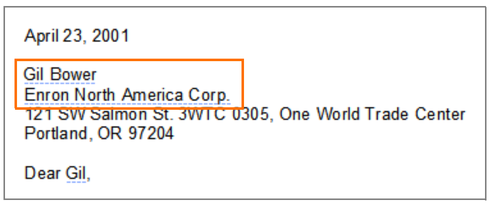


Figure 9-5. Smart tag

Notes

- You cannot delete or modify smart tags when you replicate the case offline.
- Smart tags are displayed in the transcript, document, or pleading only when the characters are displayed on the Characters tab.

To add characters to a case from smart tags list, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Character (from Smart Tags)** on the menu. The Character Smart Tags Wizard dialog box is displayed (Figure 9-6).

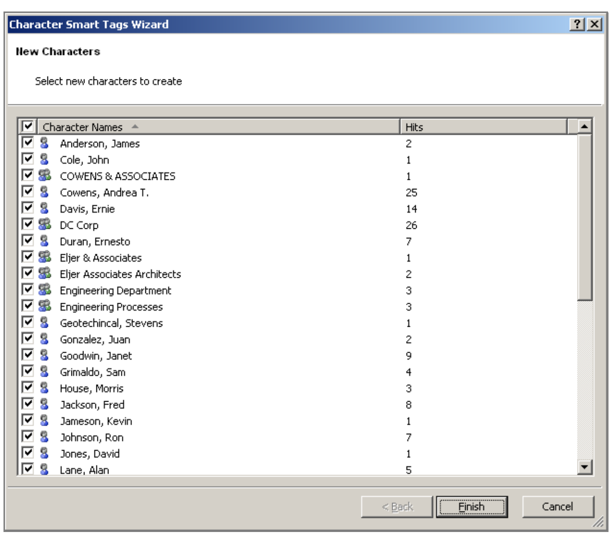


Figure 9-6. Character Smart Tags Wizard dialog box

2. By default, all of the characters are selected. To exclude a character, clear its check box.

3. Click **Finish**. The characters are listed under Characters in the left pane and the smart tags are displayed in the transcript, document, or pleading you imported.

To set Case Notebook to automatically add the characters to the case when you import a transcript, document, or pleading, see "Importing Transcripts, Documents, and Pleadings" on page 63.

Working with Aliases

When you import a transcript, document, or pleading, Case Notebook scans the text for both the names of individuals and companies and the variations, or aliases, of those names. Case Notebook then creates a list of the aliases. For example, if Case Notebook identifies the character Joseph Adams, it may create the alias Joe. You can associate aliases with a character to include all references to the character in a Characters report.

To associate an alias with a character, complete these steps:

1. Click **Characters** in the left pane to display the Characters tab in the right pane, if necessary.
2. Right-click the character with which you want to associate an alias, e.g., **Bower, Gil R.**, and click **Properties** on the menu. The Character Properties dialog box is displayed.
3. Click the **Aliases** tab (Figure 9-7).

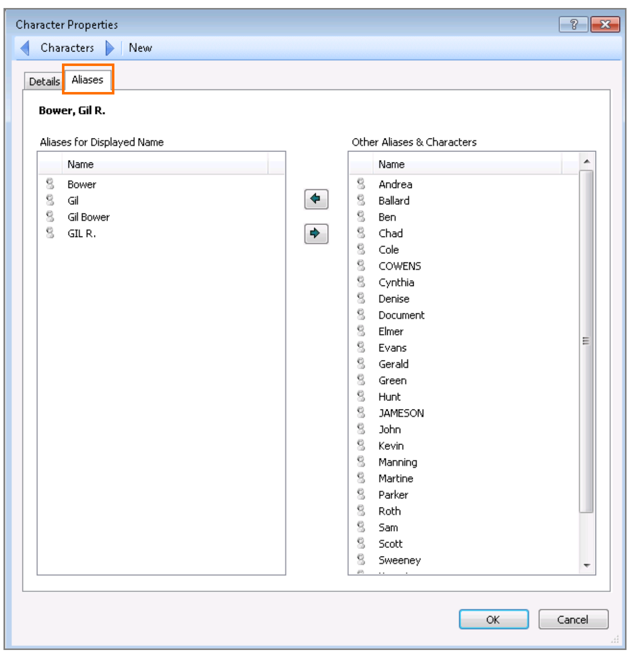


Figure 9-7. Character Properties dialog box–Aliases tab

4. Under Other Aliases and Characters, select the aliases, e.g., **Bower**, **Gil**, **Gil Bower**, **and GIL R.**, you want to associate with the character.
5. Click the left arrow to move the aliases under Aliases for Displayed Name.
6. Click **OK**. The message Changes to aliases will not be reflected in Character Smart Tags until you rebuild the Character Smart Tag index. Do you want to rebuild it now? is displayed.
7. Click **Yes**.

Retrieving a Character's Profile from Westlaw

Character profiles on Westlaw provide background information on individuals and companies including assets; civil filings; criminal records; lawsuit records; corporate records; connections between individuals and companies; and links to cases, jury trials, and settlements in which an attorney, judge, or expert witness has participated.

To retrieve a character's profile from Westlaw, complete these steps:

1. Click **Characters** in the left pane to display the Characters tab in the right pane, if necessary.
2. in the right pane, right-click the character for whom you want to retrieve a profile and click **Profile on Westlaw** on the menu. Then click one of the following on the submenu:
   - **PeopleMap (public records)** to search public records using the tabbed PeopleMap page
   - **Expert Library** to search expert materials at the tabbed Expert Center page
   - **Person and Company Library** to search materials for people and companies at the tabbed Person and Company Investigator page
   - **Attorneys and Judges** to search the Profiler–Profiles of Attorneys and Judges database (PROFILER-WLD), which includes the profiles of attorneys and judges from all 50 states, Puerto Rico, the Virgin Islands, the District of Columbia, Canada, England, and Europe)
   - **Arbitrators** to search the Profiler–Profiles of Arbitrators database (PROFILER-ARB), which includes the profiles of arbitrators identified in securities, labor, and international arbitration awards and other Westlaw resources

   Note Some sources may not be included in your Westlaw subscription.
3. At the Sign On with One Pass page, type your OnePass username and password and a client identifier in the boxes and click **Sign On**.
4. Depending on the source you selected in step 2, the appropriate tabbed page or Search page is displayed.

   Note For further information on searching public records on Westlaw, download a free copy of *Searching Public Records on Westlaw* or *Westlaw PeopleMap* at store.westlaw.com/support /user-guide/westlaw.
5. After you retrieve a character's profile, click the **Export to Case Notebook** icon ( ) in the upper-right corner of the profile. The Export to Case Notebook page is displayed.
6. Make certain the matter number corresponds to the client-matter number for the case in Case Notebook. (To view the client-matter number for the case, on the **File** menu in Case Notebook, click **Case Properties**.)
7. In the **Recent Categories** list, click an issue, if desired.
8. In the **Comments** box, type a comment, if desired.
9. Click **Save**. The Download Confirmation dialog box is displayed.
10. Click **Complete Download**. The File Download dialog box is displayed.
11. Click **Open**. The Research Files dialog box is displayed.
12. Click **Finish**. The character's profile is listed under Research in the left pane and the text of the profile is displayed in the right pane.

Creating a Characters Report

When you import data, Case Notebook automatically links the names you list under Characters with references to those names in the text of transcripts, documents, or pleadings. This report lists every instance where a character appears in the data. To create a Characters report, complete these steps:

1. On the **Main Menu** toolbar, click the **Report** button (

) on the **Main Menu** toolbar, then click **Characters** on the menu. The Characters Report Properties dialog box is displayed (Figure 9-8).

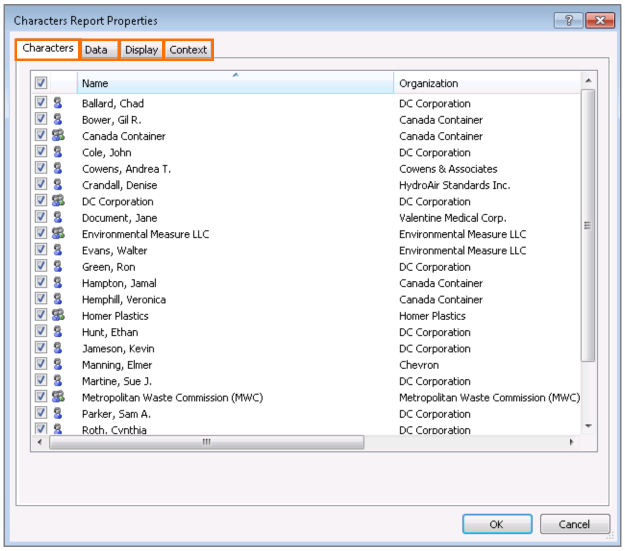


Figure 9-8. Characters Report Properties dialog box

2. All of the characters in the case are selected on the Characters tab by default. To remove a character from the report, clear its check box.
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. You can
   - type a title for the report in the **Title** box, if desired.
   - by default, the characters are sorted by Title in the report; click an option in the **Sort By** list, if desired.
   - select or clear the appropriate check boxes.
   - select the **Include cover page when printing or saving** check box, if desired.
5. Click the **Context** tab to display a list of context options. Select or clear the appropriate check boxes.
6. Click **OK**. The Characters report, which includes the lines you marked and the surrounding questions and answers, is listed under Report in the left pane and the text of the report is displayed on the Report tab in the right pane.

Exporting Characters to a File

To generate a list of characters to use apart from Case Notebook or to import into another Case Notebook case, you can export the characters to a file. To export characters to a file, complete these steps:

1. Click **Characters** in the left pane, if necessary, to display the Characters tab in the right pane.

2. Click the **Save As** arrow on the toolbar above the characters in the right pane, then click **Save All** on the menu, or, if you selected individual characters on the Characters tab, click **Save Selected** on the menu. The Save As dialog box is displayed.
3. Click a location for the file.
4. In the **File name** box, type a name for the file.
5. In the **Save as type** list, click a file type.

   Note If you want to import the characters into a different Case Notebook case, you must save the list as a CSV file.
6. Click **Save**.

Editing a Character

To edit the information for a character, right-click the character and click **Properties** on 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 click **Delete** on 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.

10 Managing Outlines

You can use the Outlines feature in Case Notebook to gather materials in one place to prepare for events such as trials, depositions, arbitrations, or client interviews. For example, you can type an outline for a deposition and then insert links to potential exhibits, language from key documents, questions from transcripts, and Westlaw research into the outline. All relevant materials are organized and displayed under Outlines in the left pane for easy access and printing.

Creating an Outline

To create an outline, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Outline** on the menu. The Create New Outline dialog box is displayed (Figure 10-1).

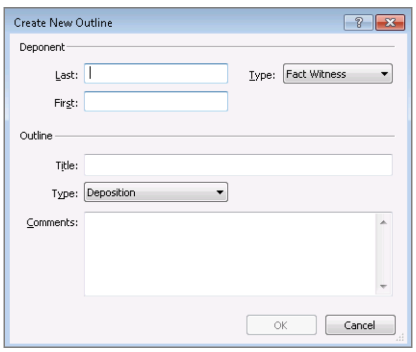


Figure 10-1. Create New Outline dialog box

2. Under Deponent,
   - in the **Last** and **First** boxes, type a last name and first name.

   Note After you create the outline, the deponent is added as a character in the case.

   - in the **Type** list, click a type of witness.
3. Under Outline,
   - in the **Title** box, type a title for the outline.
   - in the **Type** list, click an outline type.
4. In the **Comments** box, type a comment, if desired.
5. Click **OK**.

6. The outline is listed under Outlines in the left pane and displayed on a tab in the right pane (Figure 10-2).

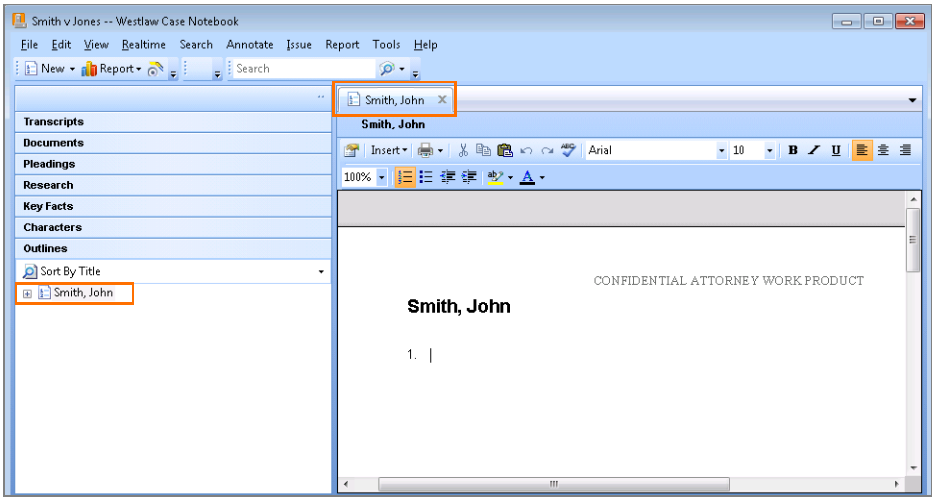


Figure 10-2. Outline tab

Inserting Information into an Outline

To add information to an outline, you can type text in the outline or your can insert

- text from a document
- a report
- potential exhibits
- transcript questions
- a Westlaw document

TYPING TEXT IN THE OUTLINE

You can type text directly in an outline. To format the text, use the icons on the toolbar above the outline or right-click in the outline and click **Format** on the menu.

INSERTING TEXT FROM A DOCUMENT

You can copy text from a document in Case Notebook and paste it into an outline. For further information, see "Transferring Document Text" on page 106.

INSERTING A REPORT

You can insert an Annotations report, Issues report, Characters report, Full Text Search report, or Auto Tags report into an outline.

To insert a report into an outline, complete these steps:

1. Create a report.
1. Click **Send** on the toolbar above the report in the right pane, then click **Outline** on the menu. The Select Outline dialog box is displayed.

   Note To insert only the questions from the report in the outline, if available, click **Outline (Questions only)** on the menu.

2. Click the outline in which you want to insert the report.

3. Click **OK**. The report is displayed in the outline. To view the outline, click its tab in the right frame (Figure 10-3).

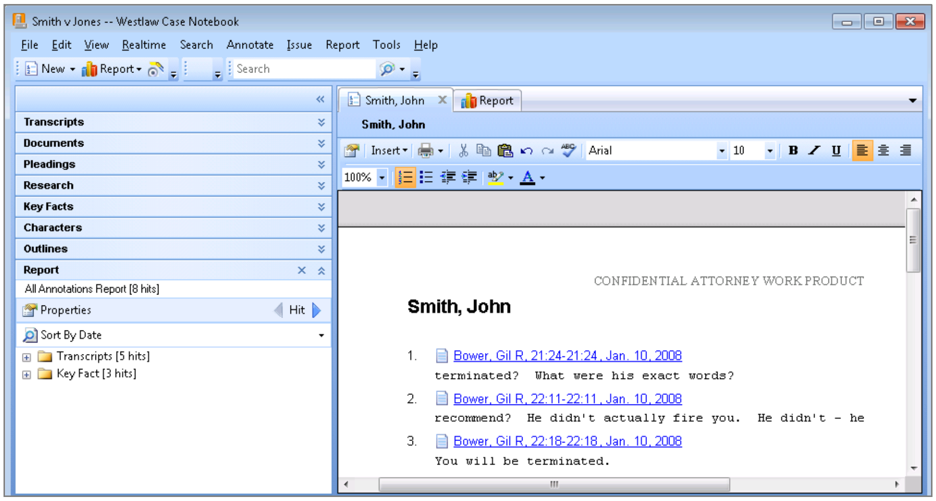


Figure 10-3. Outline with report

INSERTING POTENTIAL EXHIBITS

To insert links to potential exhibits in the outline, complete these steps:

1. Click in the outline where you want to insert the exhibits.
2. Click the **Insert** button (Insert ▾) on the toolbar above the outline, then click **Insert Potential Exhibits** on the menu. The Insert Potential Exhibits dialog box is displayed (Figure 10-4).

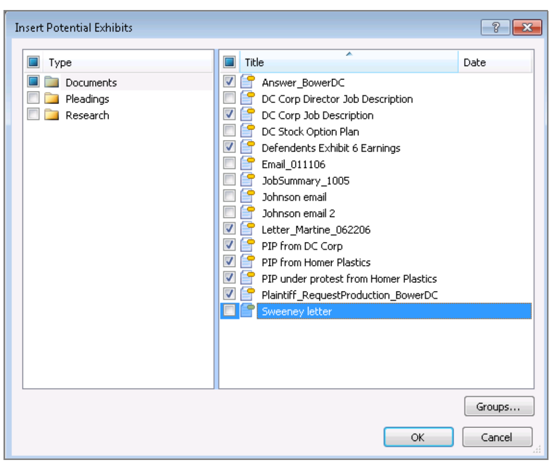


Figure 10-4. Insert Potential Exhibits dialog box

3. Click a document type, then select the check boxes next to the documents you want to include in the outline.
4. Click **Groups** to include the data in a data group in your outline. The Data Groups dialog box is displayed. Select the group you want to include in the outline and click **OK**. The Insert Potential Exhibits dialog box is redisplayed.

5. Click **OK**. A reference to each document is listed under the outline in the left pane and a link to each document is displayed in the outline in the right pane (Figure 10-5).

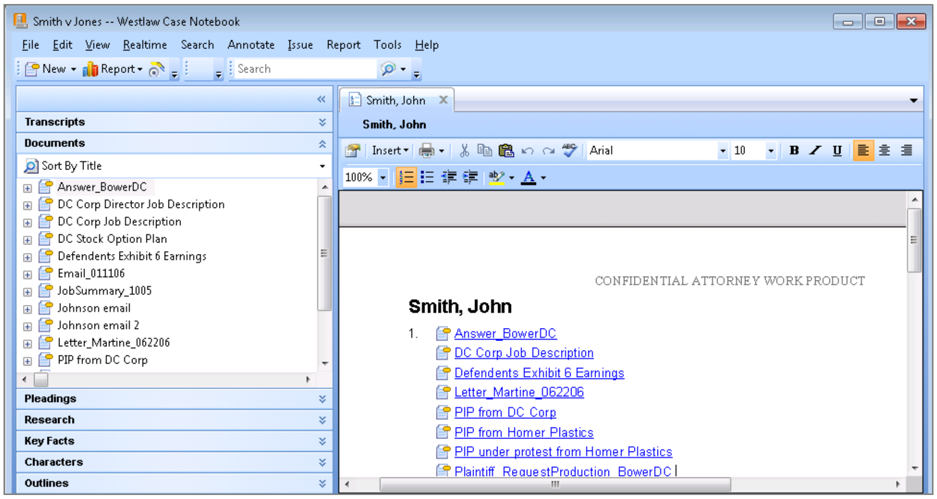


Figure 10-5. Outline with exhibits

INSERTING TRANSCRIPT QUESTIONS

You can insert transcript questions into an outline using the Insert feature or directly from a transcript using the Send feature.

Inserting Transcript Questions Using the Insert Feature

To insert transcript questions into an outline using the Insert feature, complete these steps:

1. Click the **Insert** button (Insert) on the toolbar above the outline, then click **Insert Transcript Questions** on the menu. The Insert Transcript Questions dialog box is displayed (Figure 10-6).

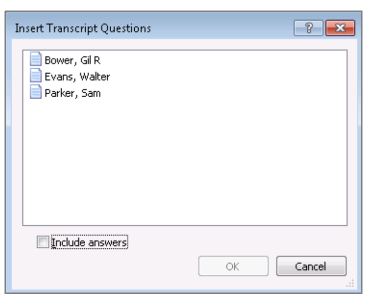


Figure 10-6. Insert Transcript Questions dialog box

2. Click the transcript containing the questions you want to include in the outline.
3. Select the **Include answers** check box, if desired.

4. Click **OK**. A link to the transcript and the transcript questions are displayed in the outline (Figure 10-7).

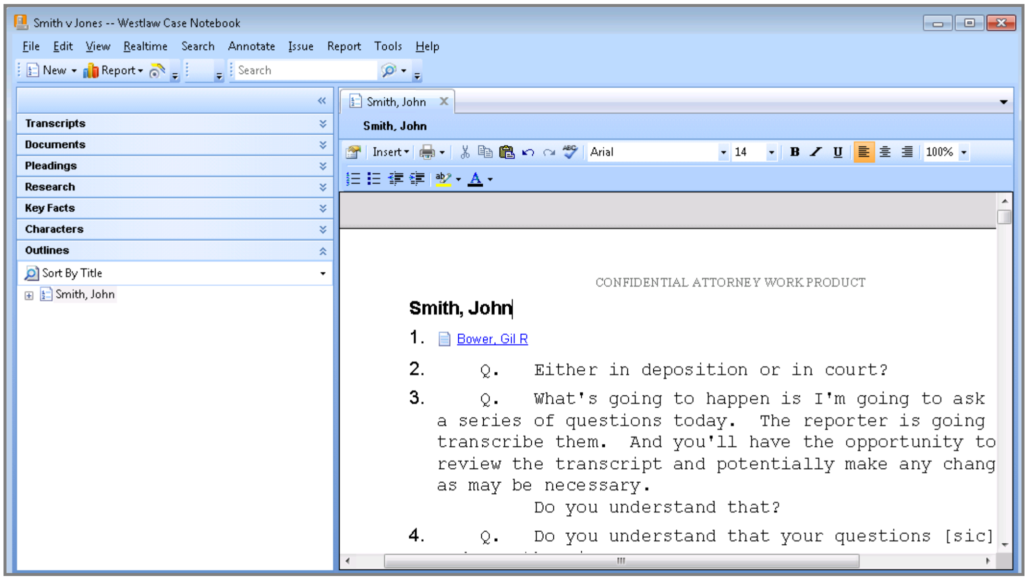


Figure 10-7. Outline with transcript questions

Inserting Transcript Questions Using the Send Feature

To insert transcript questions into an outline using the Send feature, complete these steps:

1. Access the transcript containing the questions you want to send to the outline.
2. Click the arrow next to the **Annotate Mode** button ( ) on the toolbar above the transcript in the right pane, then click the **Copy** button ( ) on the menu.
3. Select the text in the transcript that includes questions you want to send to the outline.
4. Right-click the selected text, point to **Send**, then click **Outline (Questions only)** on the menu. The Select Outline dialog box is displayed.
5. Select the outline to which you want to send the transcript questions and click **OK**. A link to the transcript and the transcript questions are displayed in the outline.

INSERTING A WESTLAW DOCUMENT

You can retrieve a document from the Witness Examination Outlines database (OUTLINES-ALL) on Westlaw and insert it into the outline on Case Notebook.

To insert a document from Westlaw, complete these steps:

1. Click in the outline where you want to insert the Westlaw document.

2. Click the **Insert** button (

) on the toolbar above the outline, then click **Insert Westlaw Outline** on the menu. The Search Westlaw dialog box is displayed (Figure 10-8).

Figure 10-8. Search Westlaw dialog box–Outlines tab

3. By default, the table of contents for OUTLINES-ALL is displayed on the Outlines tab. To search the OUTLINES-ALL database,
   - browse the table of contents by clicking the plus (**+**) and minus (**–**) symbols, then select the check box next to the document you want to retrieve.
   - click **Template** to display a search template, then type your search terms in the boxes. For further information on formulating a search, see "Working with Full Text Search" on page 98.
4. Click **Search Westlaw**. The Sign On with OnePass page is displayed.
5. Type your OnePass username and password in the boxes. The client-matter information for the Case Notebook case is entered for you in the Client ID box. (To view the client-matter number for the case, on the **File** menu in Case Notebook, click **Case Properties**.)
6. Click **Sign On** to display the Westlaw search result.

7. To send a document to Case Notebook, click the **Export to Case Notebook** icon ( ) in the upper-right corner. The Export to Case Notebook page is displayed (Figure 10-9).

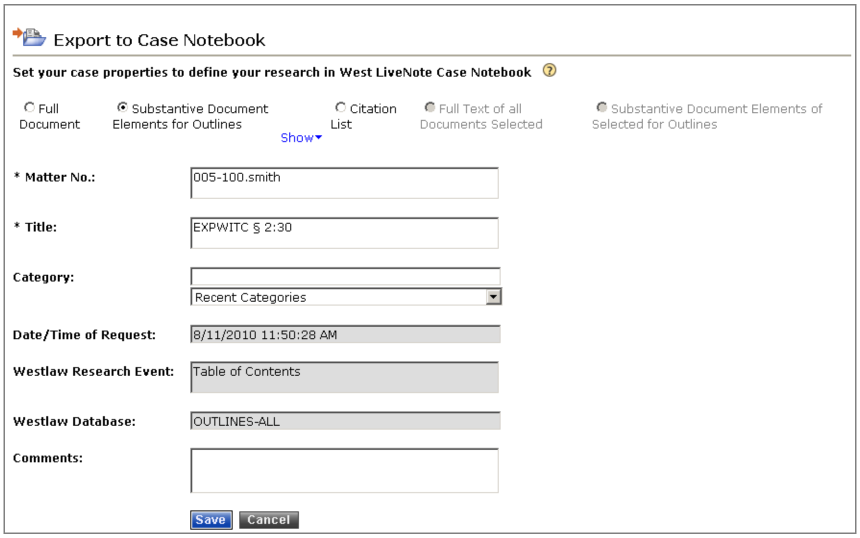


Figure 10-9. Export to Case Notebook dialog box

8. Click the **Show** arrow to add or remove a document element. Select or clear the check boxes for the elements you want to add or remove, then click the **Hide** arrow.
9. Make certain the matter number corresponds to the client-matter number for the case in Case Notebook.
10. By default, the title of the document is entered for you in the Title box. Type a different title, if desired.
11. In the **Recent Categories** list, click an issue.
12. In the **Comments** box, type a comment, if desired.
13. Click **Save**. The Download Confirmation dialog box is displayed.
14. Click **Complete Download**. The File Download dialog box is displayed.
15. Click **Open**. The Research Files dialog box is displayed.
16. Click **Finish**. The Select Outline dialog box is displayed.

17. Select the outline in which you want to insert the document and click **OK**. The text of the document is displayed in the outline in the right pane (Figure 10-10).

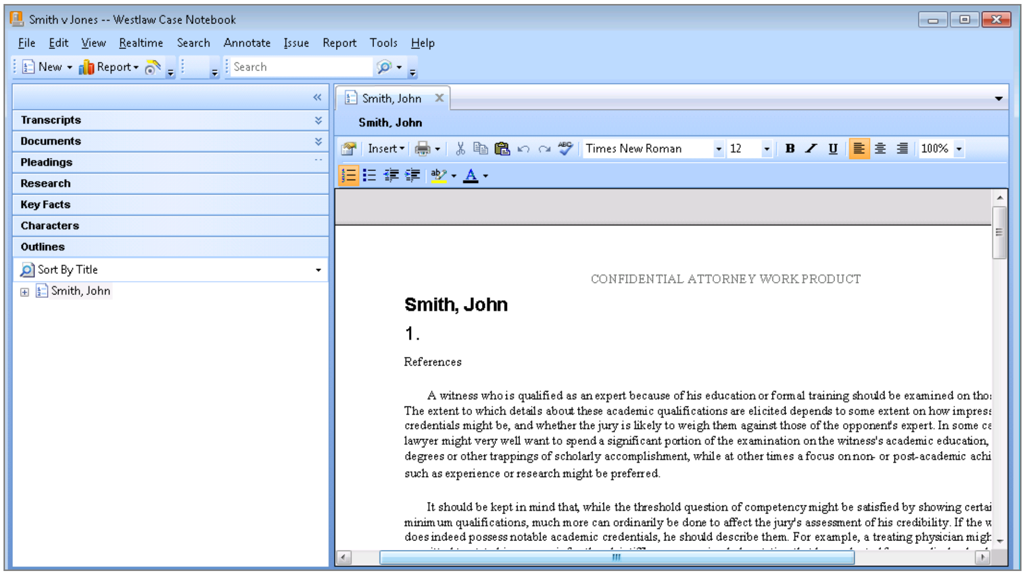


Figure 10-10. Outline with Westlaw document

Viewing Documents in an Outline

To view a list of the documents that you inserted in an outline, click **Outlines** in the left pane, then double-click the outline containing the documents.

To jump to the place in the outline where you inserted a document, double-click the document in the left pane.

To view the source document, click the link for the document in the outline. The document is displayed in the right pane.

Printing an Outline

When you print an outline, you can also easily print the exhibits listed in the outline. To print an outline with listed exhibits, complete these steps:

1. Click the **Print** icon ( ) on the toolbar above the outline. The Print dialog box is displayed (Figure 10-11).

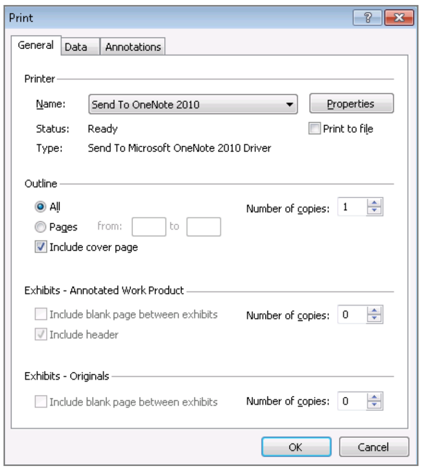


Figure 10-11. Print dialog box

2. In the **Name** list, click a printer.
3. To print the exhibits listed in your outline with annotations, under Exhibits–Annotated Work Product, type a number in the **Number of Copies** box.

   Note You must select the **Display Annotations** check box on the Annotations tab if you want to print annotations in exhibits. For further information, see steps 9–15 below.

4. Select the **Include blank page between exhibits** check box, if desired.
5. Clear the **Include header** check box, if desired.
6. To print unannotated exhibits, under Exhibits–Originals, type a number in the **Number of Copies** box.
7. Select the **Include blank page between exhibits** check box, if desired.
8. Click the **Data** tab to display all document types and data included in the outline. By default, all document types and data are selected. To exclude a document type from being printed, clear its check box. To exclude particular data from being printed, select the document type containing the data, then clear the check boxes for the data you want to exclude.
9. Click the **Annotations** tab.
10. By default, the **Display Annotations** check box is selected. This must be selected if you want to print annotations in the exhibits.
11. To include or remove annotations associated with specific issues from the printed documents, 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 86.) Select or clear the check boxes next to the issues you want to include or remove and click **OK**. The Print dialog box is redisplayed.
12. Clear the **Include Annotations with no Issues** check box, if desired.
13. Clear the **Display Annotations in footer** check box, if desired.
14. In the **Display** list, click an option for how you want the annotations displayed in the transcript text.

15. Click **OK**.

Opening an Existing Outline

To open an outline, complete these steps:

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

Deleting an Outline

To delete an outline, right-click the outline in the left pane and click **Delete** on the menu. The message Permanently delete the selected outline? is displayed. Click **Yes**.

Closing an Outline

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

11 Working with Properties

The Properties dialog box for a transcript, document, pleading, or research document allow you to

- view all properties at a single glance
- customize details
- add Doc-Level Issues
- add date and time values (document and pleading only)
- add the document to a data group
- add Doc-Level Notes

To access a Properties dialog box for a data type, right-click the document in the left pane and click **Properties** on the menu. By default, the Overview tab is displayed (Figure 11-1).

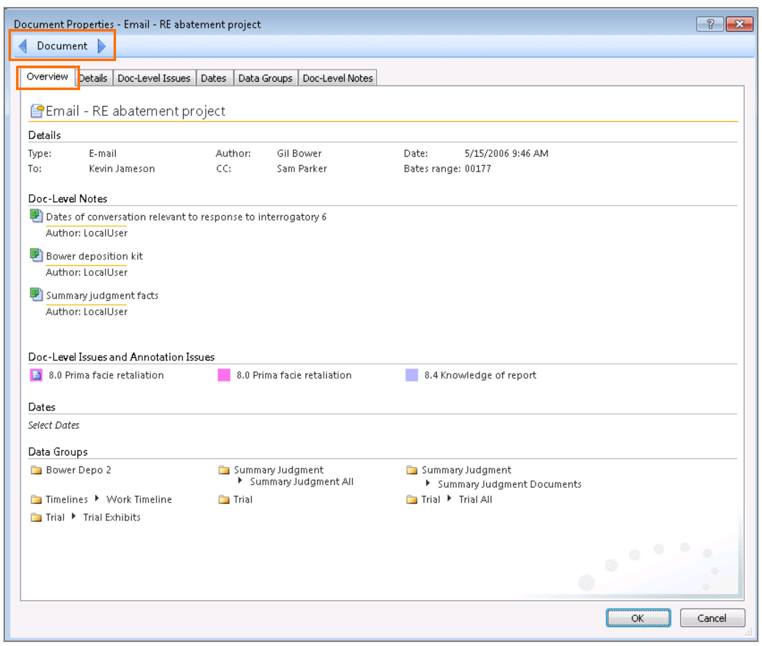


Figure 11-1. Overview tab

You can quickly move to the next or previous item by clicking the **Go to next** or **Go to previous** arrow above the tabs, shown outlined in Figure 11-1.

Using the Overview Tab

The Overview tab in the Properties dialog box displays key Case Notebook properties pertaining to the document, including its details, Doc-Level Notes, issues, and data groups. When you click an item on the Overview tab, the appropriate tab is displayed where you can edit the information.

To add a Doc-Level Note on the Overview tab, click **Add a Doc-Level Note**. The Doc-Level Notes tab is displayed. For further information, see "Adding Doc-Level Notes" on page 83.

Editing Details

When you import a transcript, document, pleading, or research document, you can enter details, such as the title, during the import process. To edit the details, click the **Details** tab in the Properties dialog box (Figure 11-2).

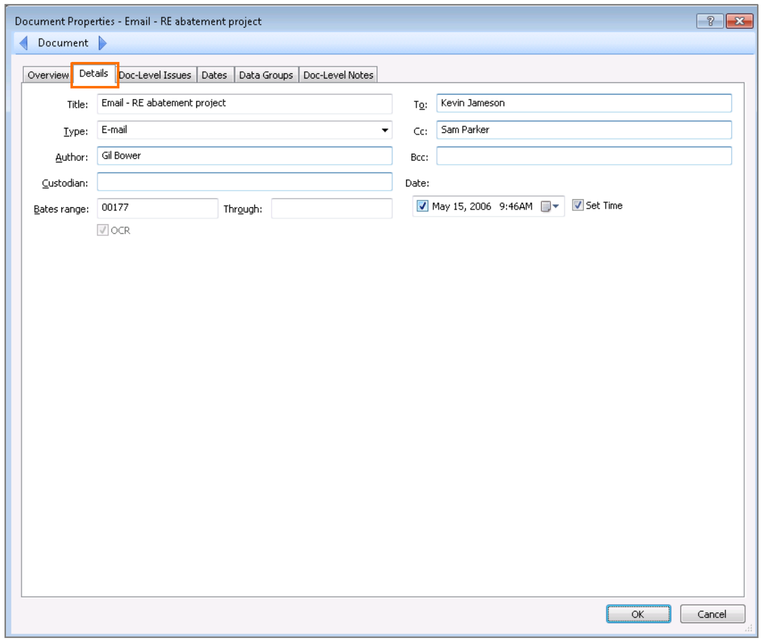


Figure 11-2. Details tab

Type the information in the appropriate boxes, then click OK.

Adding Doc-Level Issues

Case Notebook allows you to apply issues to

- selected text when you create an annotation. For further information, see "Working with Annotations" on page 91.
- the entire transcript, document, pleading, or research document when you create a Doc-Level Issue using the Properties dialog box.

In addition to allowing you to apply issues as a document property, Doc-Level Issues also provide a method of transferring issues applied to documents in other software products, such as Westlaw CaseLogistix. Therefore, when you import documents with issue coding from other products, those issues can be transferred into Case Notebook as Doc-Level Issues.

To add an issue to your entire document, click the **Doc-Level Issues** tab (Figure 11-3), then select the check box for an issue in the dialog box or click **Manage Issues** to add or edit issues. For further information on managing issues, see "Working with Issues" on page 86.

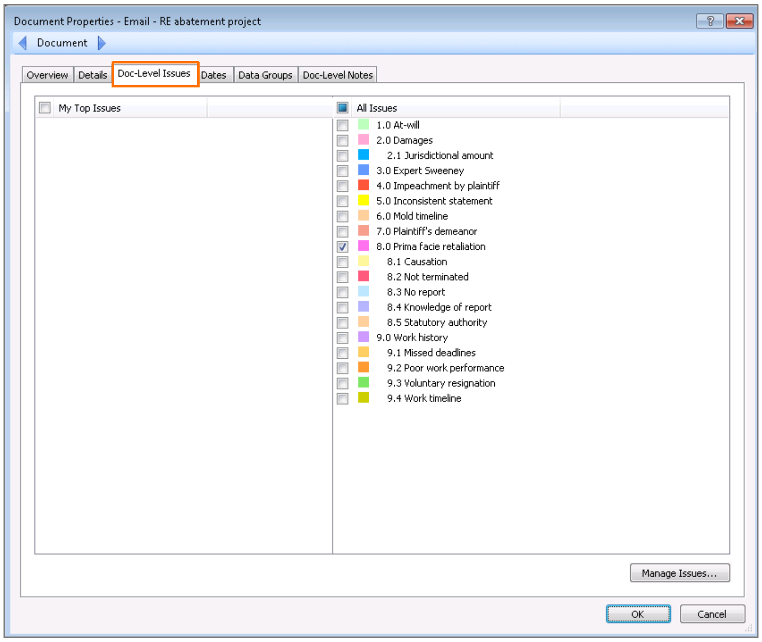


Figure 11-3. Doc-Level Issues tab

Doc-Level Issues are displayed in the following locations:

- the Overview tab in the Properties dialog box under Doc-Level Issues and Annotation Issues, shown outlined in Figure 11-5.

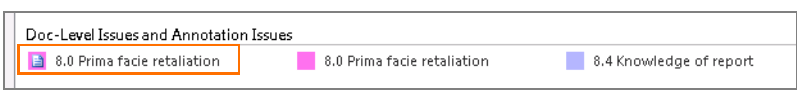


Figure 11-4. Doc-Level Issue on Overview tab

- the Doc-Level folder in the Annotations folder for the document, shown outlined in Figure 11-5. Double-click the issue to display the Doc-Level Issues tab in the Properties dialog box.

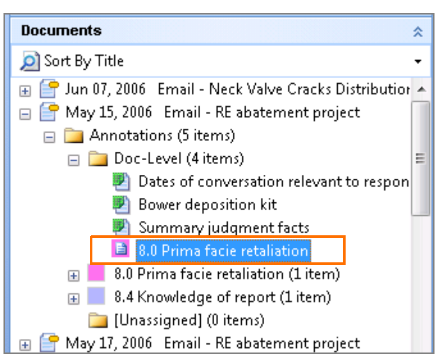


Figure 11-5. Doc-Level Issue in the Doc-Level folder

Adding Dates

Click the **Dates** tab in the Properties dialog box to apply a variety of dates to your document or pleading (Figure 11-6).

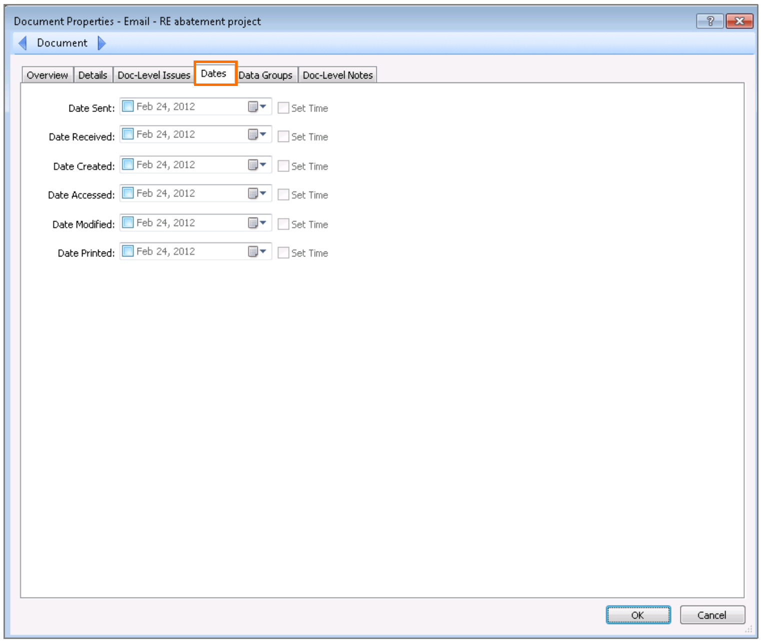


Figure 11-6. Dates tab

Select the check box for the type of date you want to add to your properties. By default, the current date is entered for you. Type a different date in the box or click the arrow to display a calendar and click a date, if desired.

When you select a date check box, you can add a time to the box by selecting the **Set Time** check box, if desired. By default, 12:00PM is entered for you. Type a different time, if desired.

Adding Documents to a Group

You can quickly add your transcript, document, pleading, or research document to a data group using the Properties dialog box. To add a data type to a group, click the **Data Groups** tab, then select the check box for a group in the box (Figure 11-7).

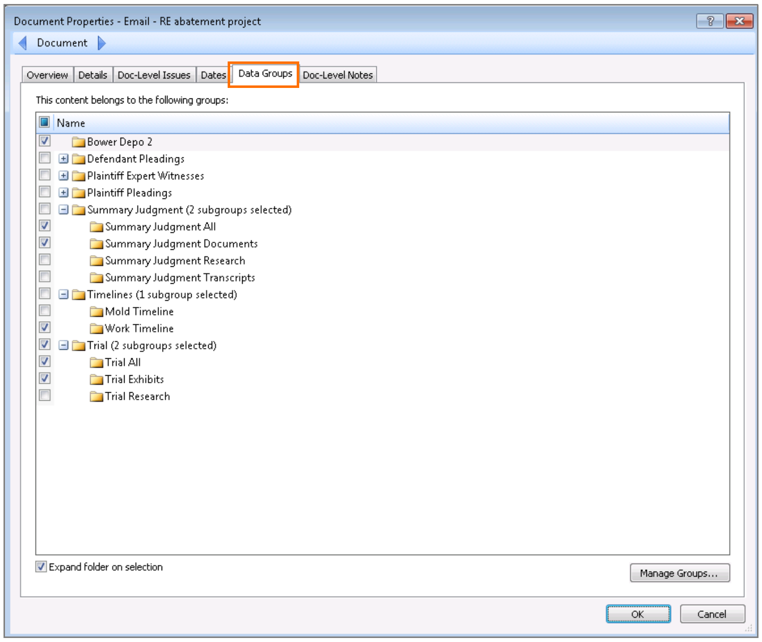


Figure 11-7. Data Groups tab

To add or edit a data group, click **Manage Groups**. For further information, see "Working with Data Groups" on page 104.

Adding Doc-Level Notes

Case Notebook allows you to add notes to

- selected text when you create an annotation. For further information, see "Working with Annotations" on page 91.
- the entire transcript, document, pleading, or research document when you create Doc-Level Note using the Properties dialog box.

In addition to allowing you to apply a note as a document property, Doc-Level Notes also provide a method of transferring notes applied to documents in other software products, such as Westlaw CaseLogistix. Therefore, when you import documents with notes from other products, those notes can be transferred into Case Notebook as Doc-Level Notes.

Note You can include note text when you run a Full Text Search.

To add a Doc-Level Note using the Properties dialog box, complete these steps:

1. Click the **Doc-Level Notes** tab (Figure 11-8).

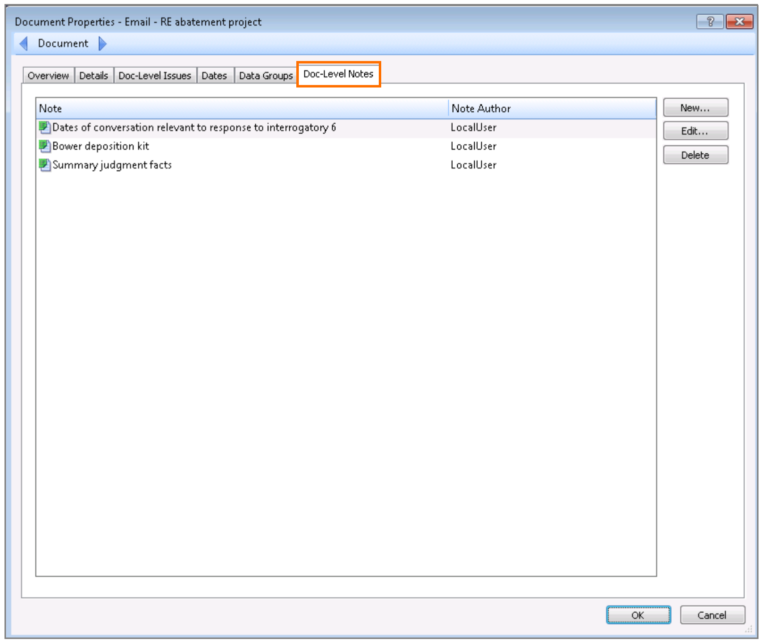


Figure 11-8. Doc-Level Notes tab

2. Click **New**. The New Doc-Level Note dialog box is displayed (Figure 11-9).

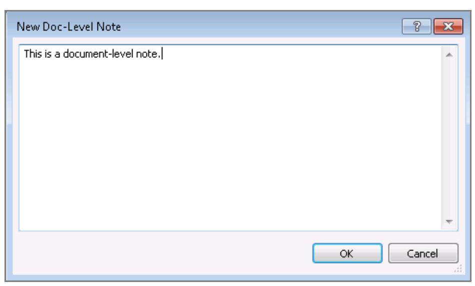


Figure 11-9. New Doc-Level Note dialog box

3. Type a note in the box, then click **OK**.

Doc-Level Notes are displayed in the following locations:

- the Doc-Level Notes tab in the Properties dialog box.
- the Overview tab in the Properties dialog box under Doc-Level Notes.

- the Doc-Level folder in the Annotations folder for the document in the left pane, shown outlined Figure 11-10. Double-click a note to display the Edit Doc-Level Note dialog box.

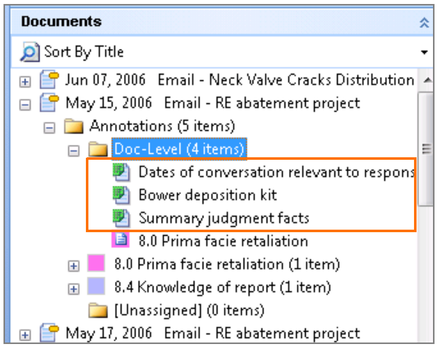


Figure 11-10. Doc-Level Notes in the Doc-Level folder

12 Working with Issues

An issue is a type of annotation that relates to a particular subject. Case Notebook allows you to apply issues to

- selected text when you create an annotation. For further information, see "Working with Annotations" on page 91.
- an entire transcript, document, pleading, or research document. For further information, see "Adding Doc-Level Issues" on page 80.

Categorizing documents or 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. On the **Main Menu** toolbar, click the **Manage Issues** button ( ). The Manage Issues dialog box is displayed (Figure 12-1).
2. Click **New** to display the New Issue dialog box.
3. In the **Issue** box, type a name for the issue, e.g., **Work history**.
4. Click the **Color** arrow to select a different color for the issue, if desired.
5. Click **Repeat** if you are creating multiple issues.
6. When you finish creating issues, click **OK** in the New Issue dialog box. The issues are listed under All Issues in the Manage Issues dialog box.

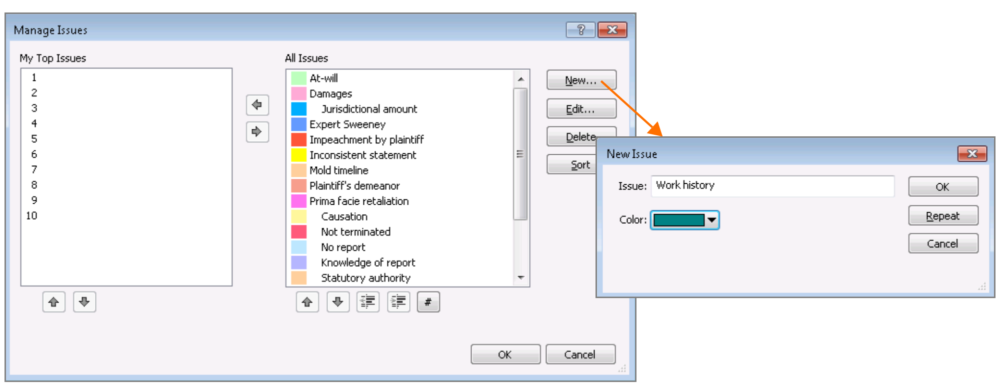


Figure 12-1. Manage Issues dialog box

CREATING SUB-ISSUES

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

To create a sub-issue, complete these steps:

1. On the **Main Menu** toolbar, click the **Manage Issues** button ( ). The Manage Issues dialog box is displayed.
2. Click the **#** button ( ), if it is not already selected, to display numbers next to the issues (Figure 12-2).

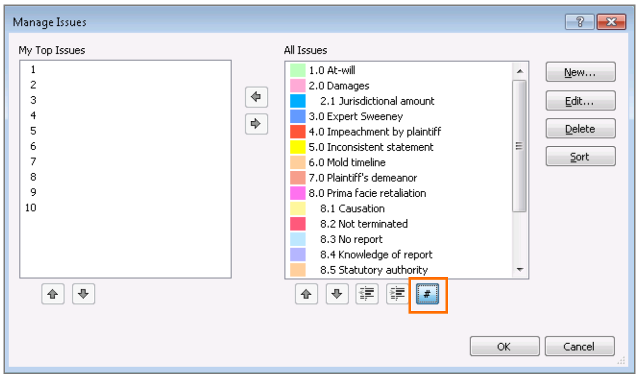


Figure 12-2. Manage Issues dialog box

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

   Note If you do not select an issue, the sub-issue is added to the bottom of the list.
4. Click **New** to display the New Issue dialog box.
5. In the **Issue** box, type a name for the sub-issue, e.g., **Missed work**.
6. Click the **Color** arrow to select a different color for the issue, if desired.
7. Click **Repeat** if you are creating multiple sub-issues.
8. When you finish creating sub-issues, click **OK** in the New Issue dialog box. The sub-issues are listed under the issue you selected.
9. Click the sub-issue, if necessary, then click the **Increase Indent** button ( ). The sub-issue is indented under the issue and the sub-issue number becomes sequential to the issue number.

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

Adding Issues to the Toolbar

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

1. On the **Main Menu** toolbar, click the **Manage Issues** button. The Manage Issues dialog box is displayed.
2. Click an issue or sub-issue under All Issues, e.g., **Work history**.
3. Click the left arrow to move the issue or sub-issue under My Top Issues.
4. Repeat steps 2 and 3 for each issue or sub-issue you want to prioritize and add to the Main Menu toolbar. You can prioritize up to 10 issues and sub-issues (Figure 12-3).
5. To reprioritize an issue or sub-issue and change its order on the Main Menu toolbar, select the issue or sub-issue under My Top Issues and click the up arrow or down arrow.

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

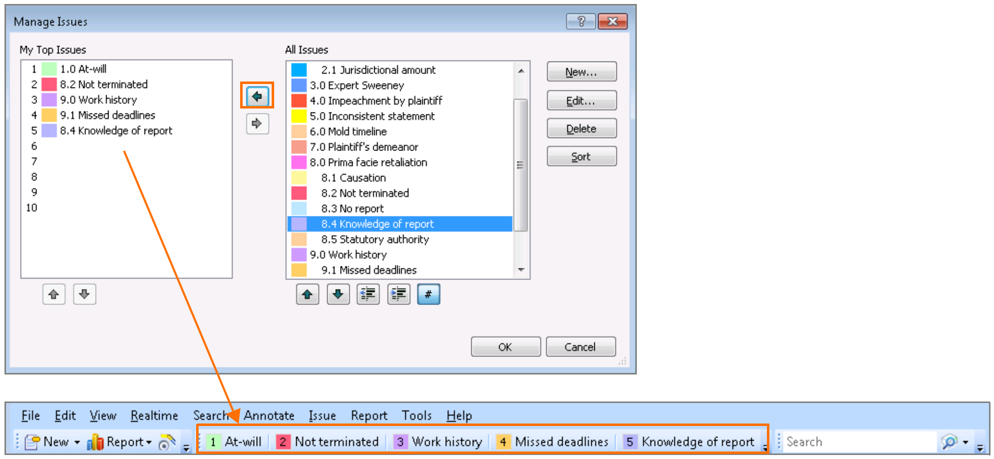


Figure 12-3. Prioritizing issues

Importing Issues

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

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

Exporting Issues

To export issues to a file, complete these steps:

1. On the **File** menu, point to **Save As** and click **Issues**. The Save As dialog box is displayed.
2. Click a location for the file.
3. In the **File name** box, type a name for the file.
4. In the **Save as type** list, click a file type.
5. Click **Save**.

Creating an 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. On the **Main Menu** toolbar, click the **Report** button (Report ▾), then click **Issues** on the menu. The Issues Report Properties dialog box is displayed (Figure 12-4).

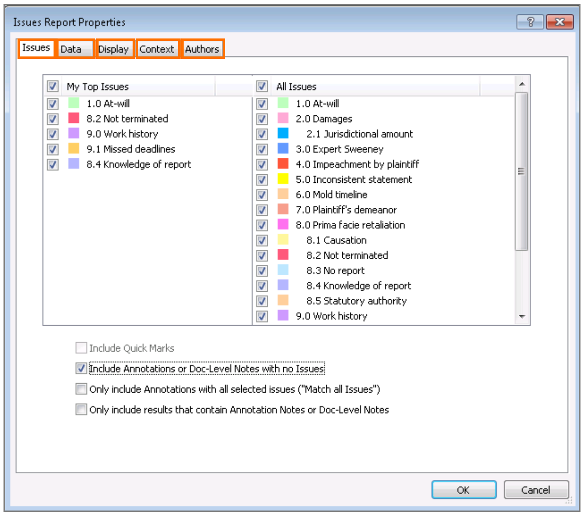


Figure 12-4. Issues Report Properties dialog box

2. On the Issues tab,
   - all of the issues in the case are selected by default. To remove an issue from the report, clear its check box.
   - select the **Include Annotations or Doc-Level Notes with no Issues** check box, if desired.
   - select the **Only include Annotations with all selected issues ("Match all Issues")** check box, if desired.
   - select the **Only include results that contain Annotation Notes or Doc-Level Notes** check box, if desired.
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. You can
   - in the **Title** box, type a title for the report, if desired.
   - in the **Sort By** list, click an option.
   - select or clear the appropriate check boxes.
   - select the **Include cover page when printing or saving** check box, if desired.
5. Click the **Context** tab to display a list of context options. Select or clear the appropriate check boxes.
6. Click the **Authors** tab to display a list of annotation authors. If you are working in a secure case on a network, a list of all annotation authors is displayed. If you are working in the case offline, only LocalUser is displayed. Select or clear the appropriate check boxes.

7. Click **OK**. The Issues report, which includes the lines you marked and the surrounding questions and answers, is listed under Report in the left pane and the text of the report is displayed on the Report tab in the right pane (Figure 12-5).

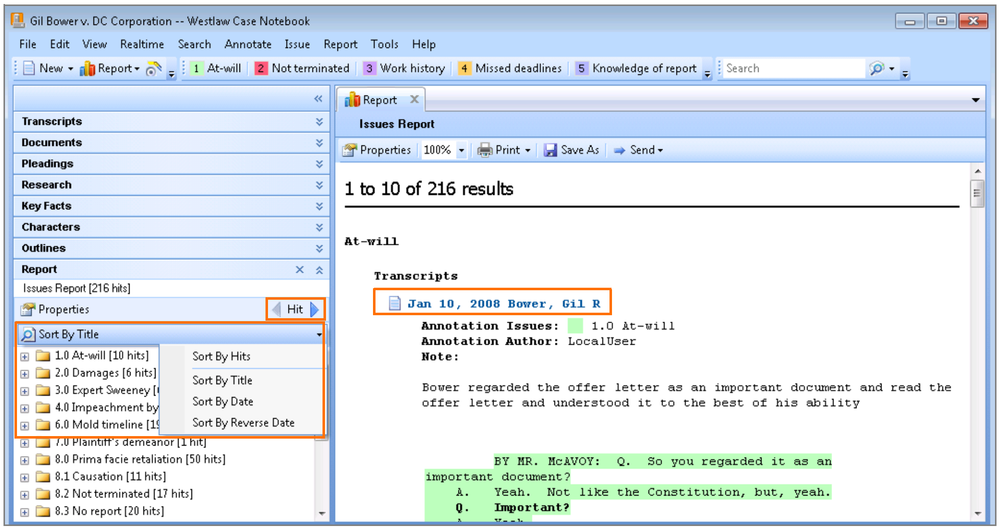


Figure 12-5. Issues report

When viewing the report, you can

- click the heading next to a document icon in the report to go to the location in the document where the issue appears.
- click the **Hit** arrows in the left pane to view the next or previous issue in the report.
- click the **Sort by** arrow in the left pane to sort your report.

13 Working with Annotations

An annotation is a highlighted portion of 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. Annotations are contained in the Annotations folder under the document in the left pane (Figure 13-1). Click the plus (+) and minus (–) symbols to view the annotations. Double-click an annotation to jump to the annotation in the transcript.

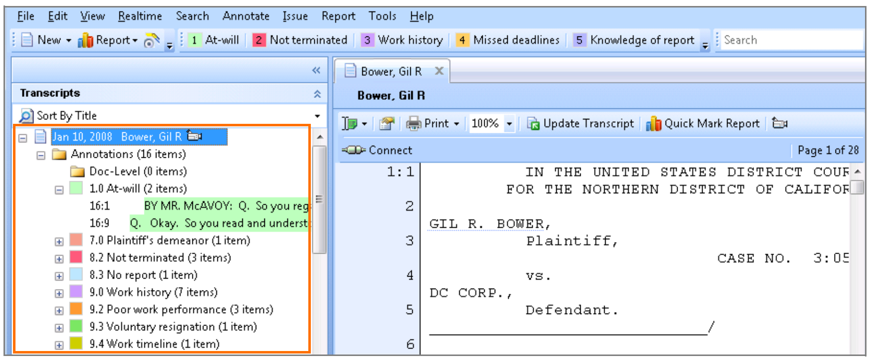


Figure 13-1. Annotations

By default, annotations are grouped by issue, as shown in Figure 13-1. To change how annotations are displayed, on the **View** menu, click **Display Options**. On the General tab in the Display Options dialog box, clear the **Group Annotations by Issue** check box.

Adding an Issue Annotation Using the Apply Issue Mode Button

To add an annotation associated with an issue using the Apply Issue Mode button on 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, then click **Apply Issue Mode** on the menu.

   Note The Annotate Mode button is the default button.

2. On the **Main Menu** toolbar, click an issue button to select the issue and assign it to the annotation you are adding.
3. Select the text you want to annotate. The text is highlighted with the color of the issue you selected (Figure 13-2). The issue will be assigned to every annotation you create until you cancel its selection on the Main Menu toolbar.

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

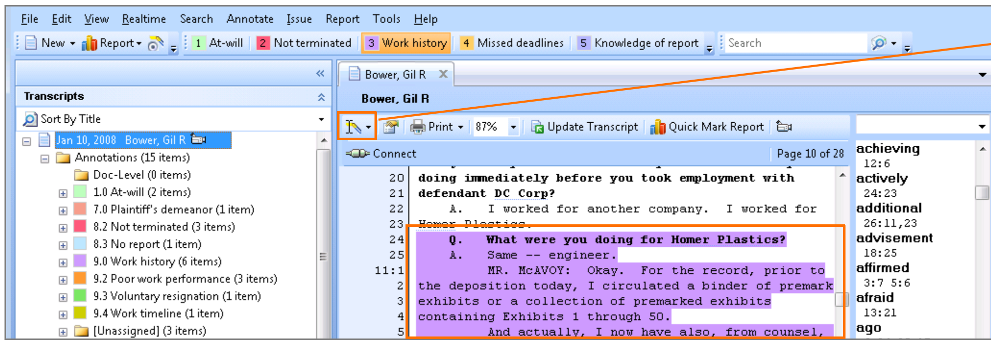


Figure 13-2. Annotated text

Adding an Annotation Using the Annotation Properties Dialog Box

You can use the Annotation Properties dialog box to add an annotation associated with a note, issue, 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 (Figure 13-3).

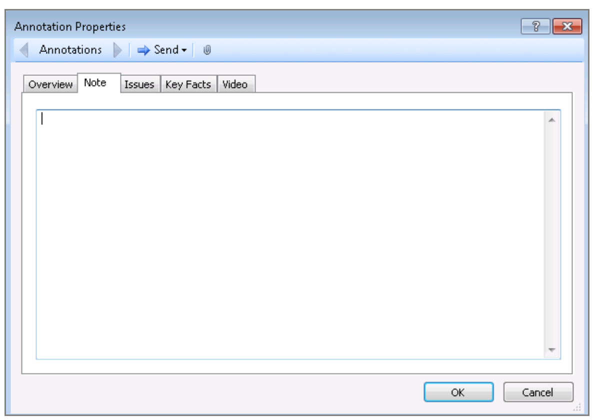


Figure 13-3. Annotation Properties dialog box

ADDING A NOTE TO AN ANNOTATION

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

ADDING AN ISSUE TO AN ANNOTATION

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

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

ADDING 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 is. Select your document and click **Open**. The Edit Attachment dialog box is redisplayed.
3. Click **OK**.
4. Click **OK** again in the Annotations Properties dialog box. For transcripts, a paper clip icon is displayed next to the annotation (Figure 13-4). To view the attachment, click the paper clip icon.

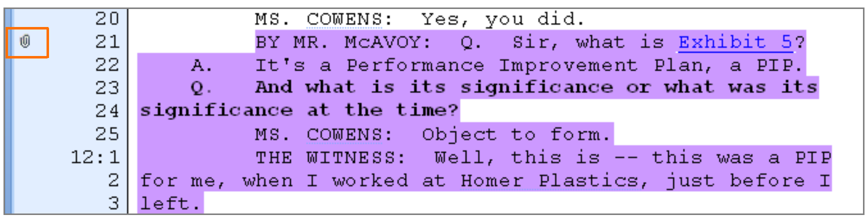


Figure 13-4. Paper clip icon in a transcript

ASSOCIATING VIDEO WITH AN ANNOTATION

You can associate video with an annotation if the transcript has been synchronized with video footage. For further information, see "Working with Video in Transcripts" on page 118.

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 click the application on the menu.
- Right-click in the annotation, point to **Send** on the menu, then click the application on the submenu.

To transfer an annotation that is associated with a video to PowerPoint, see "Transferring Annotations to Microsoft PowerPoint" on page 119.

Sending Annotations to Instant Messages

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

1. Click **Send** in the Annotation Properties dialog box, then click **Realtime Chat** on the menu.
2. Click **OK**. The annotation is displayed in the Annotation box under Stream in the left pane.
3. Click **Send** to send the annotation to your chat group. Or click an individual in the **Send To** list and click **Send**.

4. Repeat steps 1–3 for each annotation you want to send (Figure 13-5).

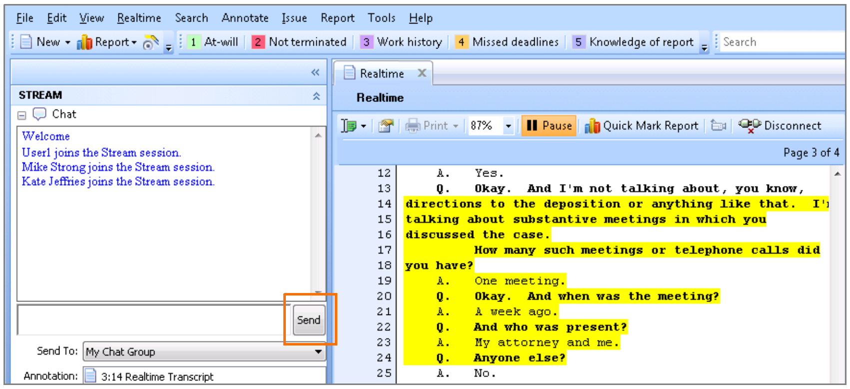


Figure 13-5. Sending an annotation to an instant message

Editing Annotations

To change the information associated with an annotation, right-click in the annotation and click Edit Annotation on 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 click Delete Annotation on 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 click Open Attachment on the menu.

Creating an Annotations Report

CREATING AN ANNOTATIONS REPORT FOR THE DOCUMENT YOU ARE VIEWING

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 listed under Report in the left pane and the text of the report is displayed on the Report tab in the right pane (Figure 13-6).

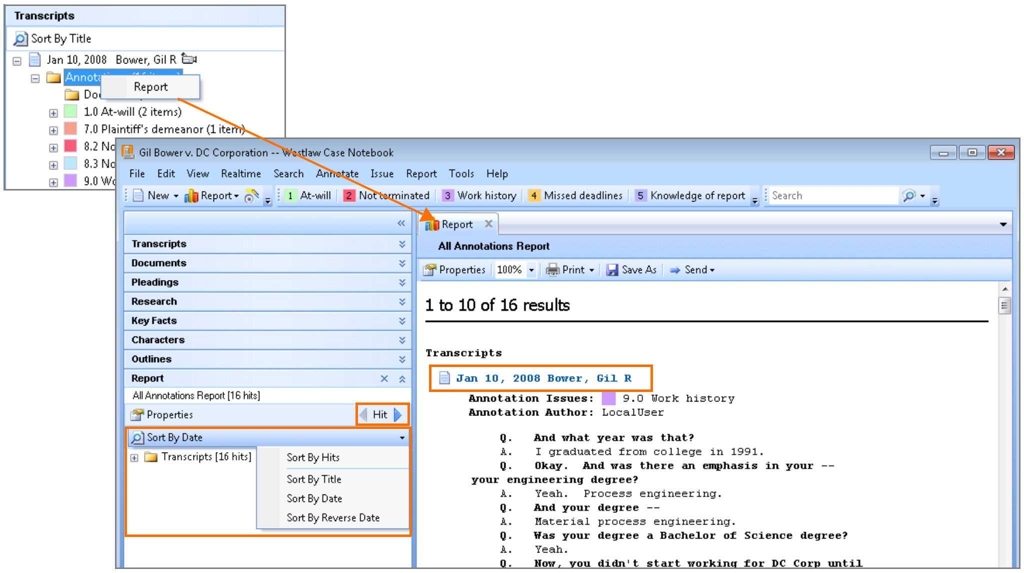


Figure 13-6. Annotations report

When viewing the report, you can

- click the heading next to a document icon in the report to go to the location in the document where the annotation appears.
- click the **Hit** arrows in the left pane to view the next or previous annotation in the report.
- click the **Sort by** arrow in the left pane to sort your report.

CREATING AN ALL ANNOTATIONS REPORT

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

1. On the **Main Menu** toolbar, click the **Report** button (Report), then click **All Annotations** on the menu. The All Annotations Report Properties dialog box is displayed (Figure 13-7).

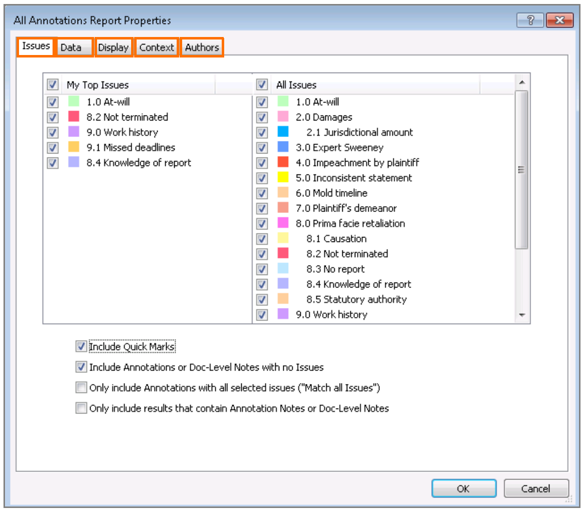


Figure 13-7. All Annotations Report Properties dialog box

2. On the Issues tab,
   - all of the issues in the case are selected by default. To exclude an issue from the report, clear its check box.
   - clear the **Include Quick Marks** check box, if desired.
   - clear the **Include Annotations or Doc-Level Notes with no Issues** check box, if desired.
   - select the **Only include Annotations with all selected issues ("Match all Issues")** check box, if desired.
   - select the **Only include results that contain Annotation Notes or Doc-Level Notes** check box, if desired.
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. You can
   - in the **Title** box, type a title for the report, if desired.
   - in the **Sort By** list, click an option.
   - select or clear the appropriate check boxes.
   - select the **Include cover page when printing or saving** check box, if desired.
5. Click the **Context** tab to display a list of context options. Select or clear the appropriate check boxes.
6. Click the **Authors** tab to display a list of annotation authors. If you are working in a secure case on a network, a list of all annotation authors is displayed. If you are working in the case offline, only LocalUser is displayed. Select or clear the appropriate check boxes.

7. Click **OK**. The Annotations report, which includes the lines you marked and the surrounding questions and answers, is listed under Report in the left pane and the text of the report is displayed on the Report tab in the right pane.

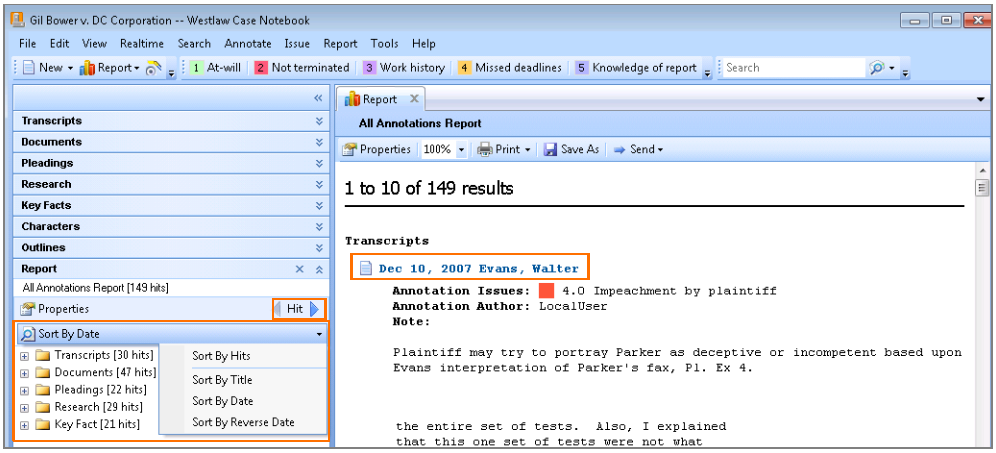


Figure 13-8. All Annotations Report

When viewing the report, you can

- click the heading next to a document icon in the report to go to the location in the document where the annotation appears.
- click the **Hit** arrows in the left pane to view the next or previous annotation in the report.
- click the **Sort by** arrow in the left pane to sort your report.

CREATING A VERBATIM SUMMARY REPORT

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

CREATING A NOTES REPORT

This report lists all of the annotations in a 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 (Properties) on the toolbar above the report to display the All Annotations Report Properties dialog box. On the **Issues** tab, select the **Only include results that contain Annotation Notes or Doc-Level Notes** check box and click **OK**.

CREATING AN 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 (Properties) on the toolbar above the report to display the All Annotations Report Properties dialog box. On the **Issues** tab, clear the **Include Quick Marks** check box. Then click the **Display** tab. Clear all check boxes under Annotations except the **Attachment** check box, then click **OK**.

14 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. On the **Search** menu, click **Full Text Search**. The Full Text Search Properties dialog box is displayed (Figure 14-1).

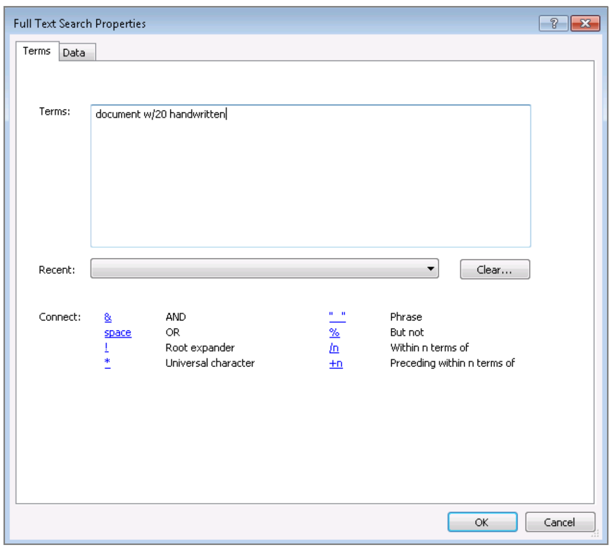


Figure 14-1. Full Text Search Properties dialog box

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

   For more information on creating a search, see "Formatting a Full Text Search" on page 100.

3. In the **Terms** box, type your search, e.g., **document /20 handwritten**. Or click a search in the **Recent** list.
4. Click the **Data** tab to display all document types and data. By default, all document types and data are selected, including the text of Doc-Level Notes. 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 **Groups** to include a group in your search, if desired.

6. Click **OK**. Information about the search is displayed under Search Results in the left pane (Figure 14-2).

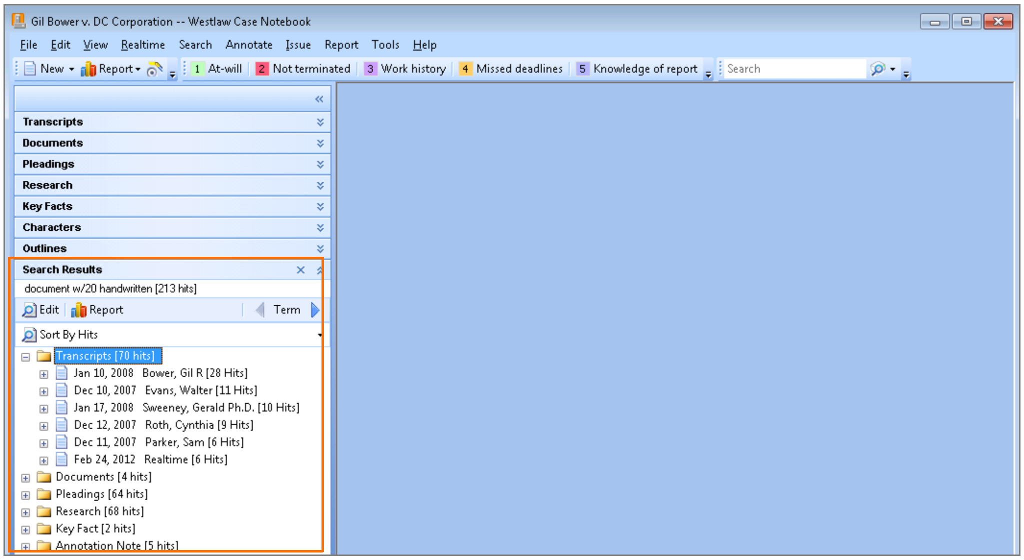


Figure 14-2. Full Text Search result

To work with your search result, you can

- click a line in the result list to display that place in the result
- click **Edit** (Edit) to edit your search
- click **Report** (Report) to create a report for your search result
- click the **Term** (Term) arrows to view the next or previous search term in your result
- click the **Sort by** arrow to sort your search result (Figure 14-3)

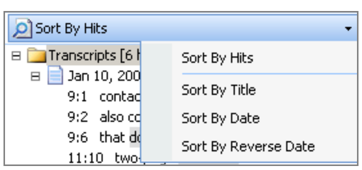


Figure 14-3. Sort by list

Formatting a Full Text Search

USING THE ROOT EXPANDER

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

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

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

USING THE UNIVERSAL CHARACTER

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

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

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

USING CONNECTORS

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

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

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

Creating a Search Report

This report lists the result retrieved when you run a search using the Full Text Search feature. To create a Search report, on the **Main Menu** toolbar, click the **Report** button (Report), then click **Full Text Search** on the menu. See "Working with Full Text Search" on page 98 for information on running searches.

15 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. On the **Annotate** menu, click **Auto Tags**. The Auto Tags dialog box is displayed (Figure 15-1).

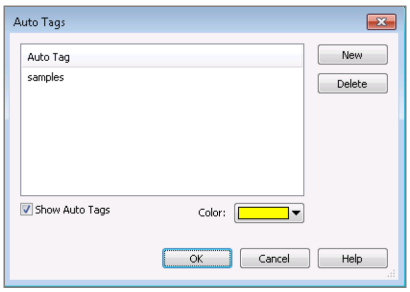


Figure 15-1. Auto Tags dialog box

2. Click **New**. Then type the word or phrase you want to add to the Auto Tags list.
3. Select the **Show Auto Tags** check box to highlight Auto Tags in the 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 (Figure 15-2).

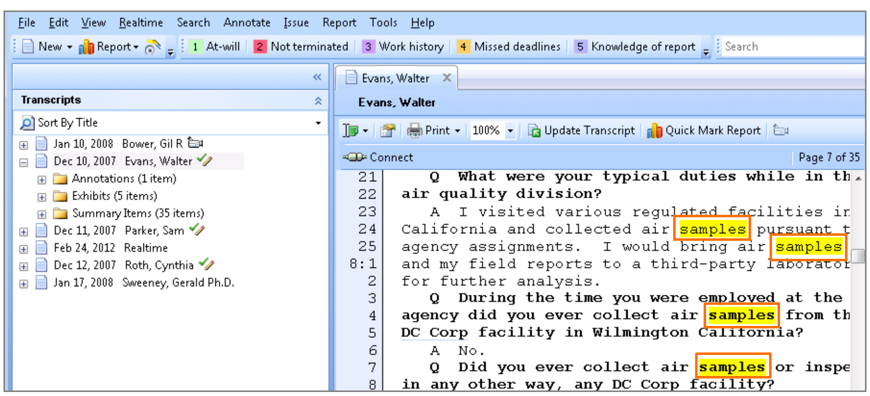


Figure 15-2. Auto Tags

Managing Auto Tags

SHOWING AND HIDING AUTO TAGS

If you choose not to show Auto Tags when you create them, on the **Annotate** menu, click **Auto Tags**. 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. On the **Annotate** menu, click **Auto Tags** to display the Auto Tags dialog box.
2. Select the Auto Tag you want to remove and click **Delete**.
3. Repeat step 2 for each Auto Tag you want to delete.
4. Click **OK** to save your changes.

Creating an Auto Tag Report

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

1. On the **Main Menu** toolbar, click the **Report** button (), then click **Auto Tags** on the menu. The Auto Tag Report Properties dialog box is displayed (Figure 15-3).

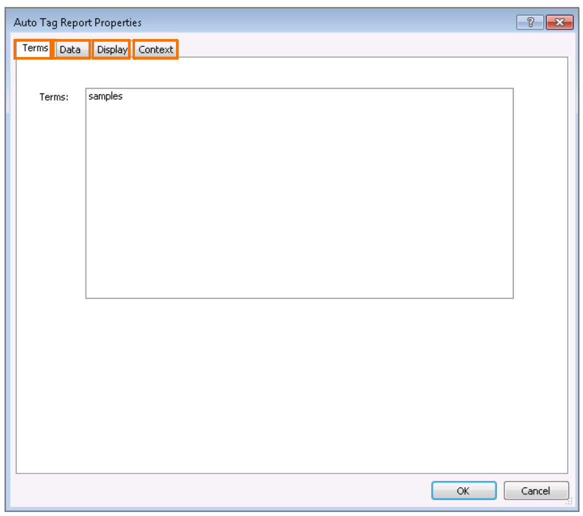


Figure 15-3. Auto Tag Report Properties dialog box

2. 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.
3. Click the **Display** tab to view a list of display options. You can
   - in the **Title** box, type a title for the report, if desired.
   - in the **Sort By** list, click an option.
   - select or clear the appropriate check boxes.
   - clear the **Highlights** check box, if desired.
   - select the **Include cover page when printing or saving** check box, if desired.
4. Click the **Context** tab to display a list of context options. Select or clear the appropriate check boxes.

5. Click **OK**. The Auto Tag report, which includes the lines with the Auto Tags and the surrounding questions and answers, is listed under Report in the left pane and the text of the report is displayed on the Report tab in the right pane (Figure 15-4).

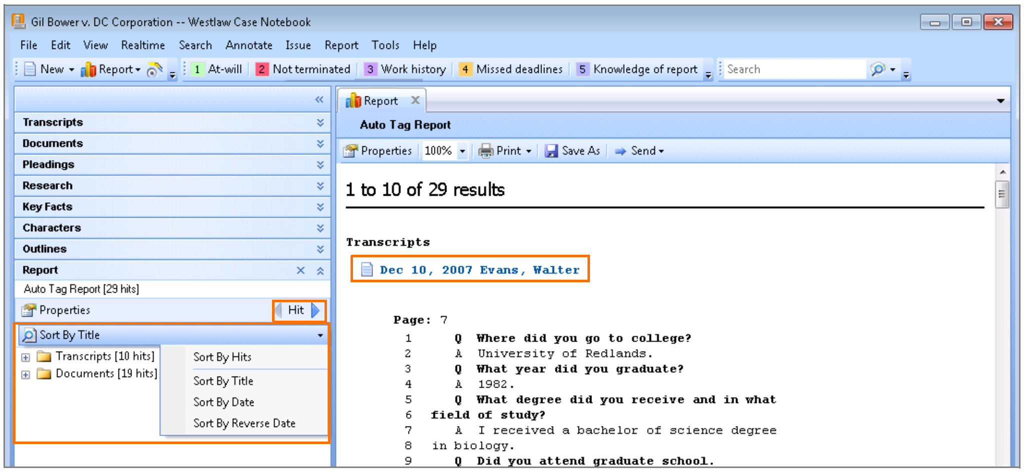


Figure 15-4. Auto Tag report

When viewing the report, you can

- click the heading next to a document icon in the report to go to the location in the document where the Auto Tag appears.
- click the **Hit** arrows in the left pane to view the next or previous Auto Tag in the report.
- click the **Sort by** arrow in the left pane to sort your report.

16 Working with Data Groups

You can organize document types and data into groups and sub-groups. For example, you can create groups based on the different types of witnesses in a case, such as character witnesses and expert witnesses. When you assign data to a group, the data is displayed under the group folder in the left pane (Figure 16-1). You can also select a group when you are preparing reports or creating searches to ensure all the document types and data you need are included.

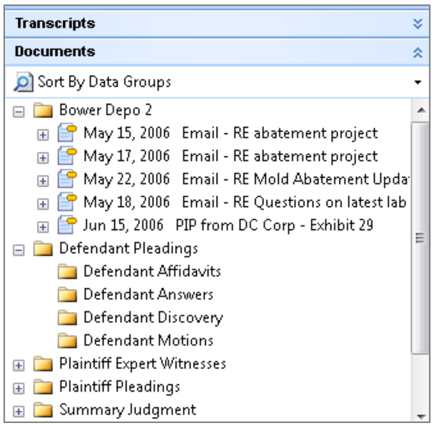


Figure 16-1. Documents organized into data groups

Creating a Data Group

To create a data group, complete these steps:

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Data Group** on the menu. The Manage Data Groups dialog box is displayed (Figure 16-2).

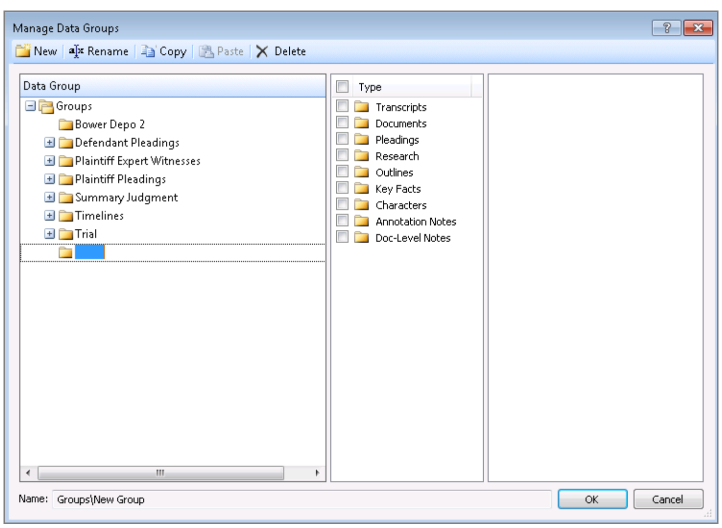


Figure 16-2. Manage Data Groups dialog box

2. Click the **New** button on the toolbar.
3. Type the name of the group, e.g., **Plaintiff Expert Witnesses**.

Note To create a sub-group for a group, click the group name, then click the **New** button on the toolbar and type the name for the sub-group under the group.

4. Click a data type in the center pane, then select the check boxes for the data you want to include in the group or sub-group. If you select the check box for the data type, all data items are automatically selected.
5. Click **OK**.

Editing Data Groups

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

1. On the **Tools** menu, click **Manage Data Groups**. The Manage Data Groups dialog box is displayed.
2. Select the group you want to edit. You can
   - click the **Rename** button on the toolbar, then type a new name for the group.
   - select or clear the appropriate check boxes for the data you want to include or exclude.
3. Click **OK**.

Using Data Groups in Reports

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

1. On the **Main Menu** toolbar, click the **Report** button (Report), then click the type of report you want to create, e.g., **Issues**.
2. In the Properties dialog box that is displayed, click the **Data** tab, then click **Groups**. The Select 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. On the **Search** menu, click **Full Text Search**. The Full Text Search Properties dialog box is displayed.
2. In the **Terms** box, type a search, or click a search in the **Recent** list.
3. Click the **Data** tab, then click **Groups**. The Select Data Groups dialog box is displayed.
4. Select the group or groups you want to include in the search and click **OK**. The Full Text Search Properties dialog box is redisplayed.
5. Click **OK** to run the search.

See "Working with Full Text Search" on page 98 for more information on using the Full Text Search feature.

Sorting by Data Groups

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

17 Transferring Document Text

You can copy text or a portion of a document and paste it into an outline in Case Notebook or other applications. For each document type, you will need to make certain that the appropriate button used for copying text is displayed. To display a button, click the **Annotate Mode** button ( ) on the toolbar above the document in the right pane, then click the appropriate button from the menu (Figure 17-1), as discussed below. The menu choices will vary depending on the document type you are viewing.

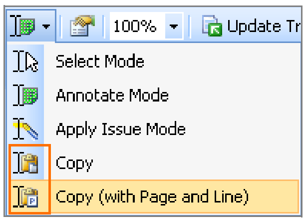


Figure 17-1. Copy buttons

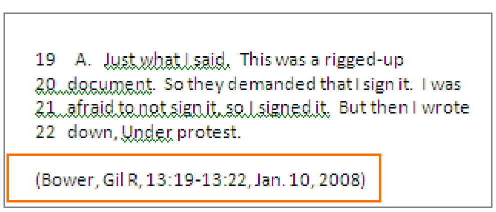
Transferring Text of a Transcript

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

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

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

1. Make certain the **Copy (with Page and Line)** button ( ) is displayed.
2. Select the text you want to copy.
3. Open an outline in Case Notebook or open another application and paste the text you have copied. For example, to paste the text into Microsoft Word, press **Ctrl+V** or click **Paste** on the **Edit** menu in Word (Figure 17-2).


19 A. Just what I said. This was a rigged-up
20 document. So they demanded that I sign it. I was
21 afraid to not sign it, so I signed it. But then I wrote
22 down, Under protest.

(Bower, Gil R, 13:19-13:22, Jan. 10, 2008)

Figure 17-2. Transcript text with citation 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 an outline in Case Notebook or open another application and paste the text you have copied. For example, to paste the text into Microsoft Word, press **Ctrl+V** or click **Paste** on 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 portion of the document you want to copy.
3. On the **Edit** menu, click **Copy**.
4. Open an outline in Case Notebook or open another application and paste the text you have copied.

Transferring Text of a Research 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 an outline in Case Notebook or open another application and paste the text you have copied. For example, to paste the text into Microsoft Word, press **Ctrl+V** or click **Paste** on the **Edit** menu in Word.

18 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 (Figure 18-1). When you are connected to a real-time session, the Word Index is updated every 15 seconds. Use the Word Index to search for a term in the document. Type the term in the box to the right of the document to display the pages and lines where the term is found in the document.

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

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

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

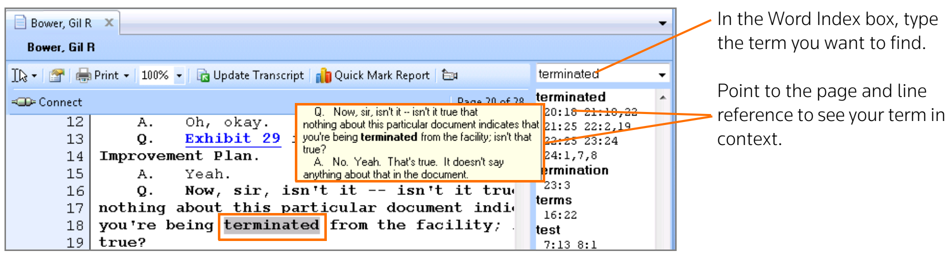


Figure 18-1. Word Index

Selecting Word Index Display Options

To select Word Index display options, on the **View** menu, click **Display Options**. The Display Options dialog box is displayed. Click the **Word Index** tab ((Figure 18-2). You can specify

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

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

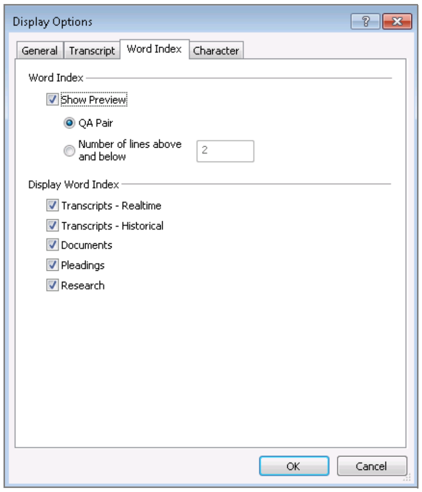


Figure 18-2. Display Options dialog box

19 Connecting to LiveNote Realtime

You can connect to a LiveNote Realtime session using

- a serial connection
- LiveNote Stream via Westlaw Case Notebook or Microsoft Internet Explorer
- your local network using an Ethernet cable or wireless connection

Connecting with a Serial Connection

If you want to connect to LiveNote 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 LiveNote Realtime* at store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.) Contact the court reporter to schedule the session.

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

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu. The Connect to Realtime dialog box is displayed (Figure 19-1).

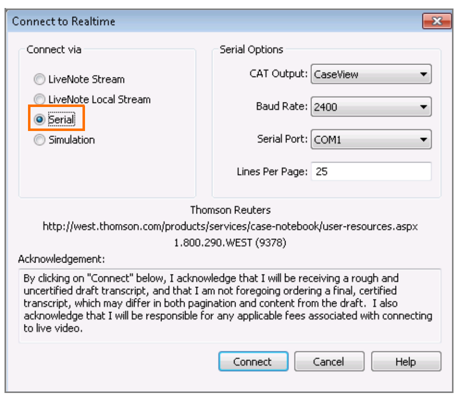


Figure 19-1. Connect to LiveNote Stream dialog box

2. Select **Serial**. The court reporter will give you the necessary settings for connecting to the reporter's CAT system. You will need to know the required serial port setting.
3. Click **Connect**.

Using LiveNote Stream

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

The court reporter must schedule the session *24 hours in advance* if you want to use LiveNote Stream to view transcript text or *72 hours in advance* to view video and text. LiveNote Central will send you an email 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 CASE NOTEBOOK

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

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu. The Connect to Realtime dialog box is displayed (Figure 19-2).

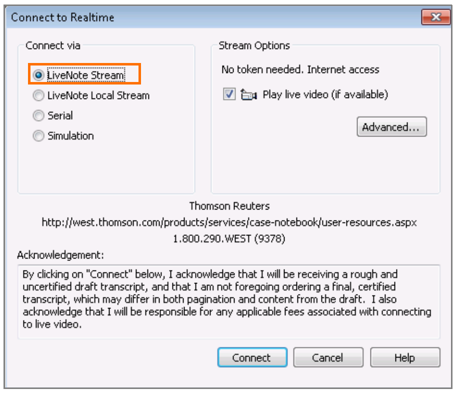


Figure 19-2. Connect to LiveNote Stream dialog box

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

ACCESSING LIVENOTE STREAM THROUGH INTERNET EXPLORER

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

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

1. Go to **www.livenote.com/stream**.
2. Type the username and password sent to you by LiveNote Central and click **Go** to display a list of your sessions.
3. Select the session you want to attend and click **Go**. The Realtime transcript text and video are displayed (Figure 19-3).

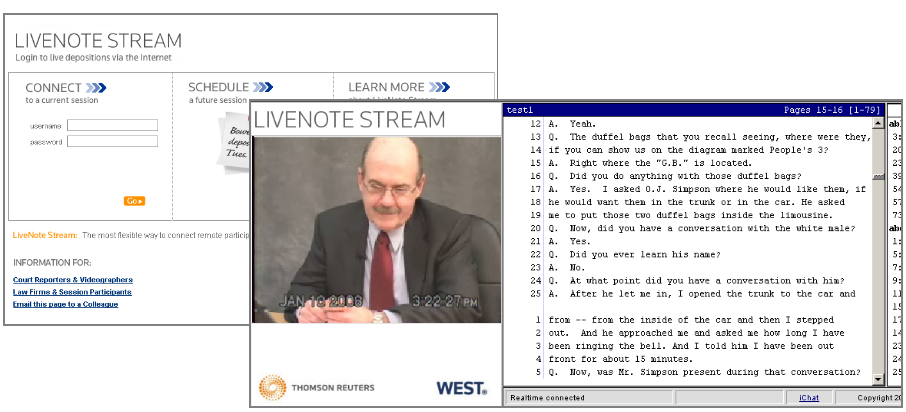


Figure 19-3. LiveNote Stream session via Internet Explorer

ACCESS TO FEATURES IN LIVENOTE STREAM

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

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

Using LiveNote Local Stream

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

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

1. On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on the menu. The Connect to Realtime dialog box is displayed (Figure 19-4).

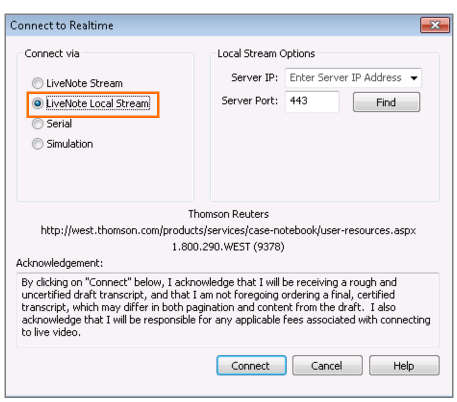


Figure 19-4. Connect to LiveNote Stream dialog box

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

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

Working with Realtime Refresh

The Realtime Refresh feature allows the court reporter to make corrections to a transcript during a LiveNote Realtime session and for the participants to view those corrections in real time. If you are participating in a LiveNote Realtime session and are connected using LiveNote Stream or LiveNote Local Stream, the Realtime Refresh feature works automatically. If you are participating in a session using a serial connection, in the Connect to Realtime dialog box, after clicking **Serial**, in the **CAT Output** list, click **Bridge**.

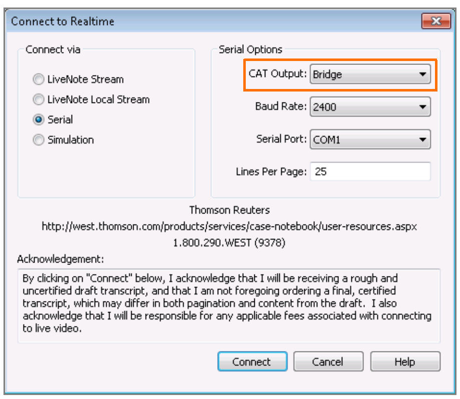


Figure 19-5. Connect to Realtime dialog box

To use Realtime Refresh, the court reporter must be using CAT software that utilizes Bridge refresh protocol. Bridge is auto-refresh technology made available by some CAT software makers, such as Eclipse. As a participant, you must have Case Notebook 3.0 or later installed on your computer.

20 Working with a Transcript in LiveNote Realtime

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

Starting and Stopping Text

To stop the scrolling transcript (Figure 20-1),

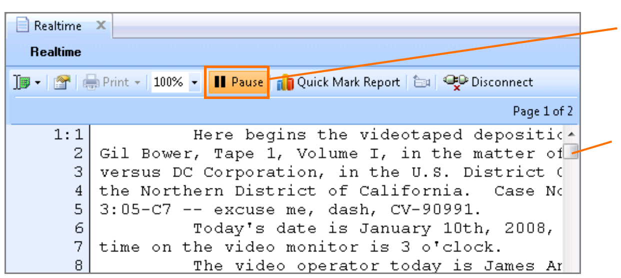
- click **Pause** on the toolbar above the transcript
- press the **Esc** key

To browse the text of the transcript,

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

To restart the scrolling transcript,

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



To stop the scrolling text, click **Pause** or press the **Esc** key. To restart the scrolling text, click **Pause** or press the **Esc** key again

Use the scroll bar to browse the text of the transcript.

Figure 20-1. Starting and stopping transcript text

Using Quick Marks

Quick Marks are marks at the line number in the margin of a transcript. They are the simplest form of annotation in 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 (Figure 20-2)

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

Quick Marks are located in the Unassigned folder within the Annotations folder under the transcript in the left pane. Click the plus symbol (**+**) next to the transcript to view the Annotations folder, then click the plus symbol next to the Unassigned folder to view the Quick Marks. 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.

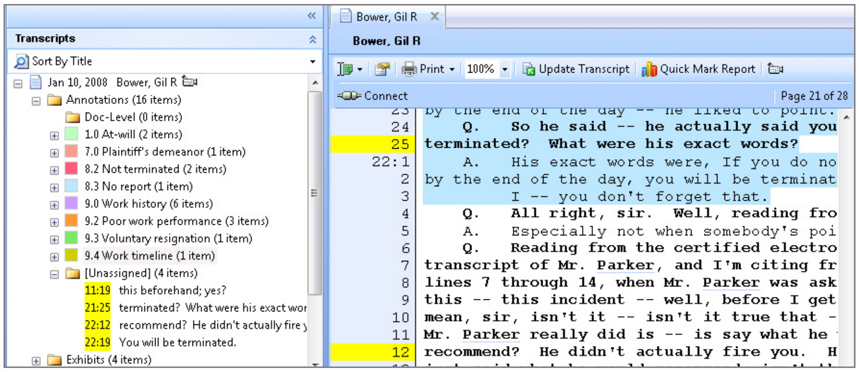


Figure 20-2. Quick Mark

Quick Marks Report

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

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

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

1. On the **Main Menu** toolbar, click the **Report** button (Report), then click **Quick Marks** on the menu. The Quick Mark Report Options dialog box is displayed (Figure 20-3).

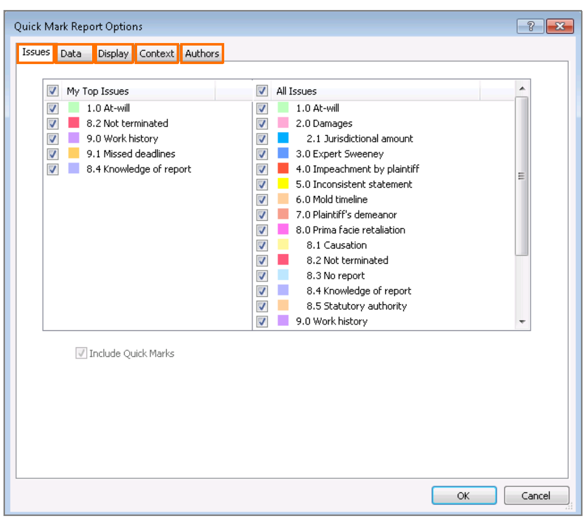


Figure 20-3. Quick Mark Report Options dialog box

2. All of the issues in the case are selected on the Issues tab by default. To exclude an issue from the report, clear its check box.
3. Click the **Data** tab to display a list of transcripts. By default, all transcripts are selected. To exclude a transcript from the report, clear its check box.
4. Click the **Display** tab to view a list of display options. You can

- in the **Title** box, type a title for the report, if desired.
- in the **Sort By** list, click an option.
- select or clear the appropriate check boxes.
- select the **Include cover page when printing or saving** check box, if desired.

5. Click the **Context** tab to display a list of context options. Select or clear the appropriate check boxes.
6. Click the **Authors** tab to display a list of annotation authors. If you are working in a secure case on a network, a list of all annotation authors is displayed. If you are working in the case offline, only 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 (Figure 20-4).

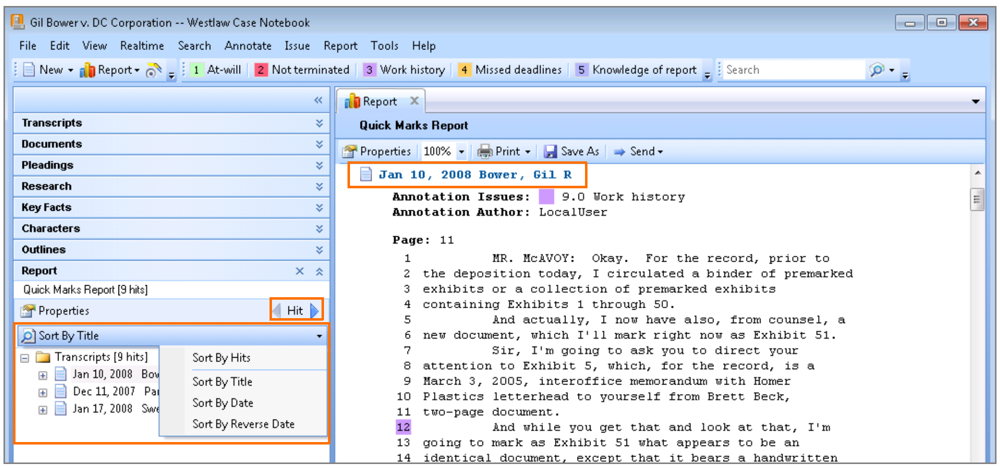


Figure 20-4. Quick Marks report

When viewing the report, you can

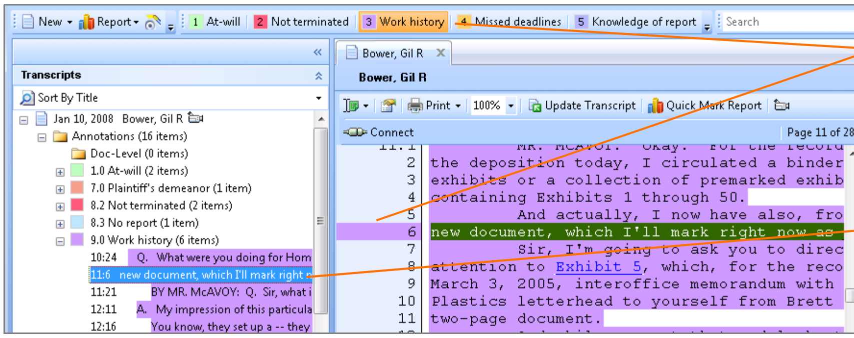
- click the heading next to a document icon in the report to go to the location in the document where the Quick Mark appears.
- click the **Hit** arrows in the left pane to view the next or previous Quick Mark in the report.
- click the **Sort by** arrow in the left pane to sort your report.

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, on the **Main Menu** toolbar, click an issue button, then click a line number (Figure 20-5).

Issue Marks are displayed with their associated issue in the Annotations folder in the left pane. Click the plus symbol (**+**) next to the transcript to view the Annotations folder, then click the plus symbol next to the issue to view the Issue Mark. 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.



On the Main Menu toolbar, click an issue button, 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.

Figure 20-5. Issue Mark

21 Working with Video in Transcripts

Playing Video Segments

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

Creating Annotation Video Segments

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

CREATING A VIDEO SEGMENT FROM A SINGLE ANNOTATION

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

1. Double-click an annotation in the left pane. The highlighted text of the annotation is displayed in the right pane.
2. Right-click in the annotation, point to **Send** on the menu, then click **Video File**. The Save As dialog box is displayed.
3. Click a location for the file.
4. In the **File name** box, type a different file name, if desired.
5. Click **Save**. The message Would you like to view the new video clip now? is displayed.
6. 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 click **Video File** on the menu. The Save As dialog box is displayed.
3. Click a location for the file.
4. In the **File name** box, type a different file name, if desired.
5. Click **Save**. The message Video files saved successfully. Would you like to open the containing folder now? is displayed.
6. Click **Yes** to open the folder in which the video segments are stored. The page and line ranges are added to the video segments.

EDITING VIDEO SEGMENTS

To edit the start and end time for a video segment that is associated with an annotation, right-click in the annotation and click **Edit Annotation** on the menu. The Annotations Properties dialog box is displayed. Click the **Video** tab, make your changes in the appropriate boxes, then click **OK** (Figure 21-1).

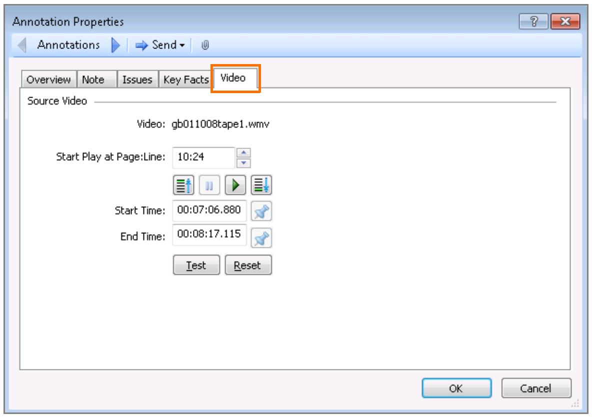


Figure 21-1. Annotations Properties–Video tab

Transferring Annotations to Microsoft PowerPoint

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

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

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

CREATING A POWERPOINT PRESENTATION FROM A SINGLE ANNOTATION

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

1. Double-click an annotation in the left pane. The highlighted text of the annotation is displayed in the right pane.
2. Right-click in the annotation, point to **Send** on the menu, then click **PowerPoint**. The Save As dialog box is displayed.
3. Select a location for the file.
4. In the **File name** box, type a different file name, 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 click **PowerPoint** on the menu. The Save As dialog box is displayed.
3. Click a location for the file.
4. In the **File name** box, type a different name for the file, 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. Click **Append slides to existing presentation** to add slides to the existing presentation.

Appendix

Using Issues to Create an Errata Report

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

1. Create an issue named **Errata** (see "Working with Issues" on page 86) and 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.
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** box, e.g., **Witness says name should be Joan, not John.** Click **OK**.
6. Right-click the **Annotations** folder under the transcript in the left pane and click **Report**. The report is listed under Report in the left pane and the text of the report is displayed on the Report tab in the right pane.
7. Click the **Properties** button (Properties) on the toolbar above the report to display the All Annotations Report Properties dialog box.
8. On the Issues tab, clear all check boxes except the **Errata** check box.
9. Select the **Only include Annotations with all selected issues ("Match all Issues")** check box.
10. Click **OK**. The report is redisplayed on the Report tab in the right pane with only the Errata annotations.

Converting RealLegal Binder Cases to Case Notebook Cases

When you open a RealLegal Binder case in Case Notebook, the properties for the case may or may not be converted. The following chart describes how the RealLegal Binder case properties are converted.

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

Prompts and Messages for Video and PowerPoint

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

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

In most cases you will want to append or add slides to the existing PowerPoint presentation. Refer to "Transferring Annotations to Microsoft PowerPoint" on page 119 for more information.

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

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

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

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

Synchronized video is not associated with this transcript.

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

Video does not exist for this transcript.

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

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

This is a catchall error message designed for unsupported scenarios. Please contact Customer Technical Support at 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.

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

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

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

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

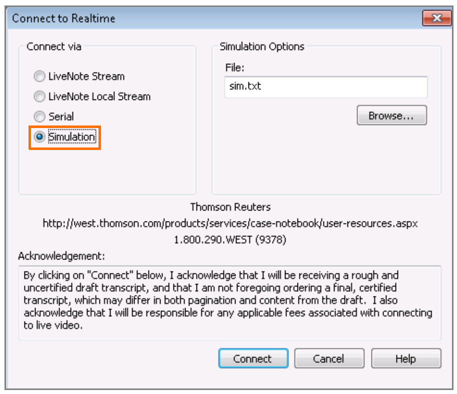
PowerPoint must be installed before you can transfer annotations to PowerPoint.

Connecting to a Simulated LiveNote Realtime Transcript

When 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 Case Notebook.

To access the simulation, complete these steps:

1. Access 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. On the **Main Menu** toolbar, click the **New** arrow, then click **Realtime Transcript** on 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 click **Properties** on the menu. The Transcript Properties dialog box is displayed. Click the **Details** tab and type a different title for the transcript in the **Title** box, then click **OK**.

Trial Version of Case Notebook

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

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

In the trial version, you cannot

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

Notes

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

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