

1. LIVENOTE ADMINISTRATION QUICKSTART GUIDE

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Introduction

This QuickStart Guide will quickly get you started using LiveNote Administration. Please see the online help for full information about using this product.

LiveNote version 8.0 introduces secure cases and access control, which are managed through LiveNote Administration.

You can use secure cases to control access to sensitive cases. Only authorized users have access to a case, and you can control the level of access a user has on a case-by-case basis.

LiveNote 8.0 uses a new file format for secure cases that cannot be opened by older versions of LiveNote.

Working with secure cases offline

LiveNote 8 makes it easy to work with other people on secure cases in a network environment. While you are in the office, you work on the network secure case. If you need to work on a case while you are out of the office, you replicate the case to offline on your hard drive. When you return to the office, you replicate the offline case back to the network. All of your work is transferred.

When a user replicates a case to offline, LiveNote recognizes that they are no longer working in the network environment—they are now working on the case in *offline* mode. The user cannot work on the case on the network until they return to *network* mode by replicating their work back to the network.

If a user loses their offline cases (for example, if their laptop is stolen, or the hard drive crashes), you must manually reset the user's mode to *network* mode for each case the user replicated to

offline. The user can then log in to these cases and carry out their normal tasks. See the help topic *Reset user mode*.

Installing the LiveNote Administration network client

The LiveNote Administration network software must be installed on your network before you begin this procedure. You must also have a network drive mapped to the location where LiveNote Administration was installed before beginning this procedure.

Each administration user must then install the LiveNote Administration network client on their computer before they can manage secure cases.

To install the LiveNote Administration network client:

1. In Windows Explorer, browse to the folder on your network where LiveNote Administration is installed.
2. Double-click on **AdminNetSetup.exe**. The **Welcome** dialog box appears.
3. Click **Next**. The **Start Installation** dialog box appears.
4. Click **Next**. The **Installing** dialog box appears while the Administration network client is installed to your computer.

When installation is complete, the **Release Notes** dialog box appears.

5. Please read the Release Notes, and then click **Next**. The **Installation Complete** dialog box appears.
6. Click **Finish**.

If a secure cases folder has not been created for your organization, see *Creating a Secure Cases Folder*.

If another administrator has created a secure cases folder for your organization, see *Opening an Existing Secure Cases Folder*.

Getting Started with LiveNote Administration

Follow these steps to get started using secure cases:

1. **Create a secure cases folder**
Your first task when you begin working with LiveNote Administration is to create a secure cases folder where you will store your secure cases. See *Creating a Secure Cases Folder*.
2. **Create user accounts**
You must create accounts for each of the users who will access your secure cases. When you create a user, you specify their default user type and permissions. See *Creating user accounts*.
3. **Create groups**
To assist you in managing users and cases, LiveNote Administration enables you to create groups and assign users to the group. You can then assign the group to a case, instead of having to assign users individually to a case. Users in a group assigned to a case have their default user type and permissions for the case. If you want to assign case-specific permissions for a user, you must assign the user to a case as an individual. A user can be assigned to a case both as an individual and as a member of a group.
4. **Create cases**
When you have created your users and groups, you need to create or add secure cases for them to work with. You can do this by creating a new secure case, or by importing an existing case as a secure case. See *Creating a new secure case* and *Importing a non-secure case to create a secure case*.

5. **Assign users to cases**

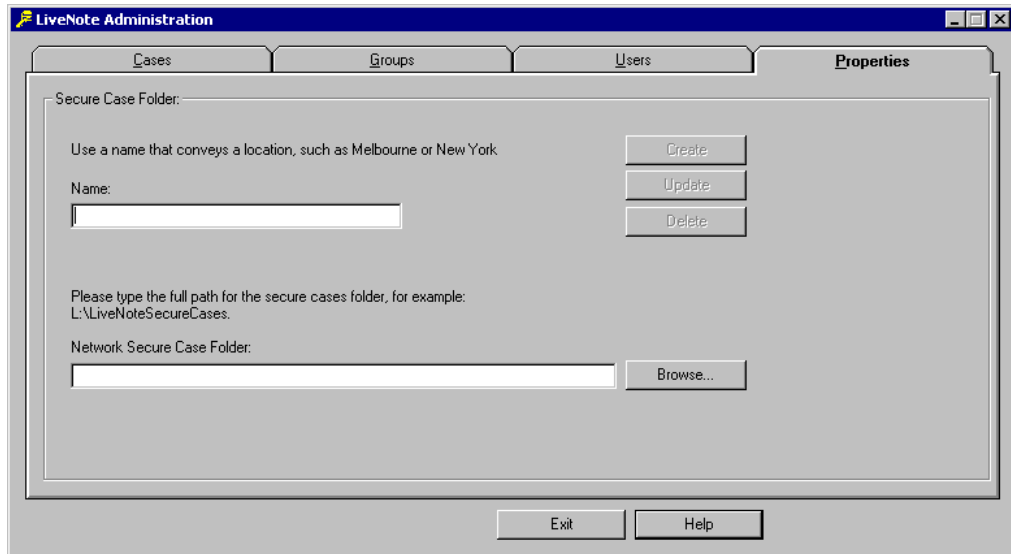
Now you can give users and groups access to specific cases. When you first assign a user to a case, LiveNote applies the same permissions and user type as those you set when you created the user account. You can modify a user's permissions for each case, and they can be different for each case. See *Assigning users to a case*.

Creating a Secure Cases Folder

You cannot work with secure cases until you have created an administrator user and a secure cases folder. All secure cases are stored in this folder. You cannot change the location of the secure cases folder once it is created.

To create the secure cases folder:

1. Start LiveNote Administration. The LiveNote Administration window appears at the **Properties** page.



2. Type a name for your office in the **Name** field. Use a name that conveys a location, such as New York or Chicago.
3. Type the full path for the secure cases folder in the **Network Secure Case Folder** field. For example, L:\LiveNoteSecureCases. If this folder does not exist, LiveNote will create it for you.

Note: If your file system does not support long file names the folder name must be no more than 8 characters. Special characters, such as spaces are not allowed. Contact your system administrator for information.

OR

- a. Click **Browse**. The **Browse for Folder** dialog box appears.
 - b. Browse to the folder where you want to store secure cases.
 - c. Click **OK**. The **Browse for Folder** dialog box closes.
4. Click **Create**. The **Create an Administrator User** dialog box appears.
 5. Type a username and password for the administrator account, and retype the password in the **Confirm** field. The password must be between 6 and 16 characters in length.
 6. Click **OK**. The **Create** button becomes unavailable, and the **Delete** button becomes available.

You can now create user accounts.

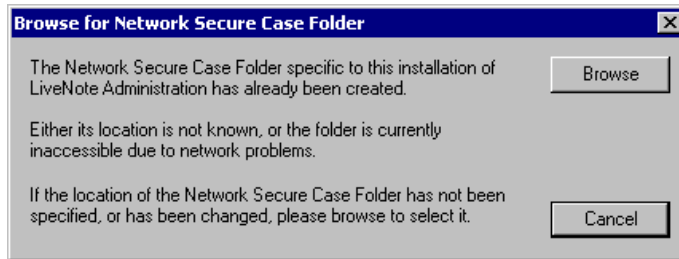
Opening an Existing Secure Cases Folder

If another administrator has created the secure cases folder for your organization, you will need to tell LiveNote Administration the location of this folder before you can perform administration tasks.

Note: Only one administrator can access the secure case folder at a time.

To open an existing secure cases folder:

1. Start LiveNote Administration. The **Browse for Network Secure Case Folder** dialog box appears.



2. Click **Browse**. The **Browse for Folder** dialog box appears.
3. Browse to the existing secure cases folder.
4. Click **OK**. The **LiveNote Administration Logon** dialog box displays. If another administrator is managing secure cases at this time, a message is displayed, informing you that you cannot open the secure cases folder at this time.
5. Complete the **User Name** and **Password** fields with your administrator user name and password.
6. Click **OK**. The **LiveNote Administration Logon** dialog box closes, and LiveNote Administration completes the **Name** and **Network Secure Case Folder** fields on the **Properties** page.

You can now administer secure cases.

About User Types

LiveNote 8 has a hierarchy of five user types. The lowest level of access is External User. Each successive level has increased abilities, and has all of the abilities of levels below it.

Note: Any changes to an offline secure case made by a Reader or External User are not replicated back to the network.

All offline changes made to the case by Author, Editor, or Power Users are replicated back to the network case, except for changes to auto tags.

Offline restrictions

While any user type has an offline secure case open, the **Replication** command on the **Options** menu is not available.

External User

External Users have the most restricted permissions in a secure case. They can perform the following tasks:

- View transcripts, linked documents and videos
- Perform full text searches of transcripts and linked documents
- Print transcripts and full text searches
- Set LiveNote options

External Users can carry out the following tasks for secure cases that they have replicated to offline:

- Create new transcripts and connect to realtime
- Create and delete auto tags
- Update and delete transcripts created while the case is offline

Reader User

Reader Users can perform the same tasks as External Users as well as the following tasks:

- View all annotations, issue marks, and quick marks
- View and print all reports

Author User

Author Users can perform the same tasks as Reader Users as well as the following tasks:

- Create annotations, issue marks, and quick marks
- Edit his or her annotations.

Author Users can carry out the following task for secure cases that they have replicated to offline:

- Create, edit and delete new issues only. Any new issues that have not been deleted before the user replicates the case back to the network become part of the network case. From that point, only a Power User with Case Manager permission can edit these issues.

Editor User

An Editor User can perform the same tasks as an Author User as well as the following task:

- Edit annotations, issue marks, and quick marks created by other users

Editing restrictions

When working in an offline secure case, an Editor User cannot edit annotations created by other users.

When working in a network secure case, an Editor User cannot edit annotations created by any user who has the case currently replicated to offline.

Power User

You can also assign permissions to a Power User to enable them to carry out additional tasks. See *About User Permissions*

A Power User can perform the same tasks as an Editor User, as well as the following tasks:

- Create and manage transcripts
- Create and manage transcript groups
- Open a network secure case in *Exclusive* mode
- Open a network secure case in Exclusive mode and perform the following tasks:
 - Connect to realtime
 - Manage the case index and thesaurus.

Editing restrictions

When working in a network secure case, a Power User cannot edit annotations created by any user who has the case currently replicated to offline.

Offline restrictions

While a Power User has an offline secure case open, the **Replication** command on the **Options** menu is not available.

When working in an offline secure case, a Power User cannot perform the following tasks:

- Edit annotations created by other users
- Create, edit or delete transport groups
- Edit the properties of existing transcripts
- Delete existing transcripts.

About User Permissions

You can assign additional permissions to users.

Can Replicate

By default all users are able to replicate secure cases offline to their local hard drive and back to the network. You can prevent a user from replicating any case or individual cases by removing this permission from the user's default permission, or case specific permissions.

Can Change Password

Users must supply their user name and password before they can access secure cases. You can prevent a user from changing the password that they have been assigned in LiveNote Administration.

Case manager

Power Users only.

A case manager is responsible for managing aspects of a secure case that affect all users. The case manager must open the case on the network to perform these tasks.

Case managers can:

- Create, and manage issues
- Edit case properties
- Create auto tags

Administrator

Power Users only.

An administrator must have access to LiveNote Administration.

Administrators can:

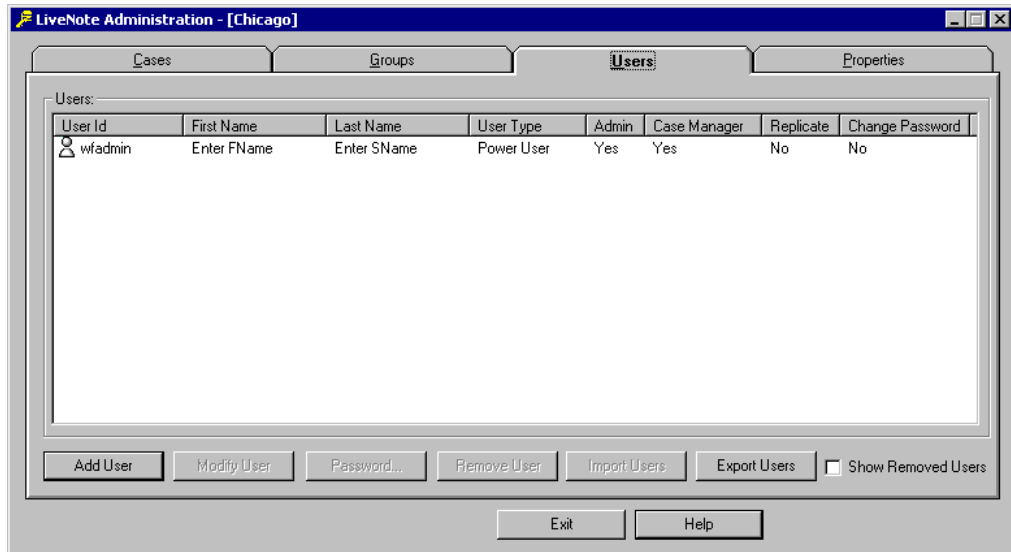
- Create, import, and delete secure cases
- Create and manage user accounts
- Assign users to cases and set case-specific permissions for those users

Creating user accounts

You must create accounts for users before you can assign them to cases. You only need to create a user account once.

To add a user account:

1. Click the **Users** tab. The **Users** page appears.



2. Click **Add User**. The **User Details** dialog box becomes available.

User Name:

Last Name:

First Name:

Password:

Confirm:

Default Permissions:

User Type

Power

Editor

Author

Reader

External

Administrator

Case Manager

Can Replicate

Can Change Password

OK Cancel

3. Type the username you are assigning for the user in the **User Name** field. User names can be up to 14 characters long.
4. Complete the **Last Name** and **First Name** fields.
5. Type an initial password for this user in the **Password** field. Passwords must be between six and sixteen characters long.

Note: Both the user name and password are case-sensitive.

6. Type the password again in the **Confirm** field.
7. Select the type for this user under **User Type**. See *About user types* for information about the types of tasks each user type can perform.
8. Set the default permissions for this user. By default the **Can Replicate** and **Can Change Password** permissions are set for each user. The **Case Manager** and **Administrator** permissions are only available for power users. See *About user permissions* for information about the types of tasks a user with each permission can perform.

Select the check box under **Default Permissions** for each permission you want to assign to the user. Clear the check box to remove a permission for the user.

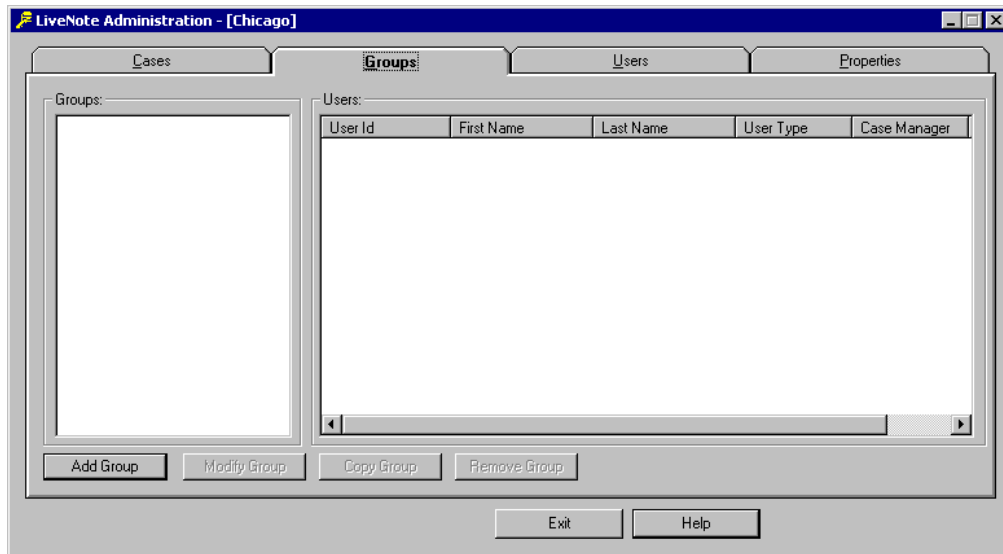
9. Click **OK**. The **User Details** dialog box closes and the user is added to the **Users** list.

Creating user group

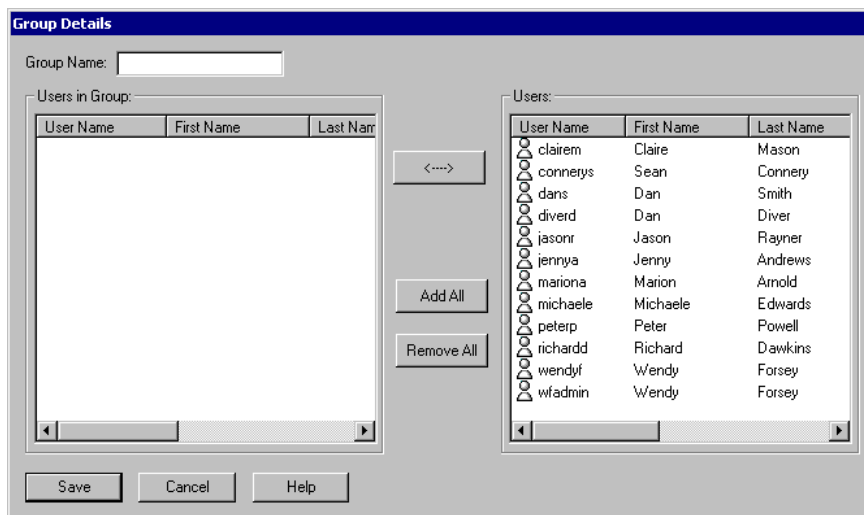
You can create a user group to simplify the task.

To add a user group:

1. Click the **Groups** tab. The **Groups** page appears.



2. Click **Add Group**. The **Group Details** dialog box appears.



3. Type the name of the group in the **Group Name** field.
4. Select the users you want to add to the group in the **Users** list. You can select individual users or a range of users. Click **<---->**. The selected users are moved from the **Users** list to the **Users in Group** list.

Click **Add All** to add all users to the group.

5. To remove users from the group, select the users you want to remove from the group in the **Users in Group** list. You can select individual users or a range of users. Click **<---->**. The selected users are moved from the **Users in Group** list to the **Users** list.

Click **Remove All** to remove all users from the group.

6. Click **Save**.

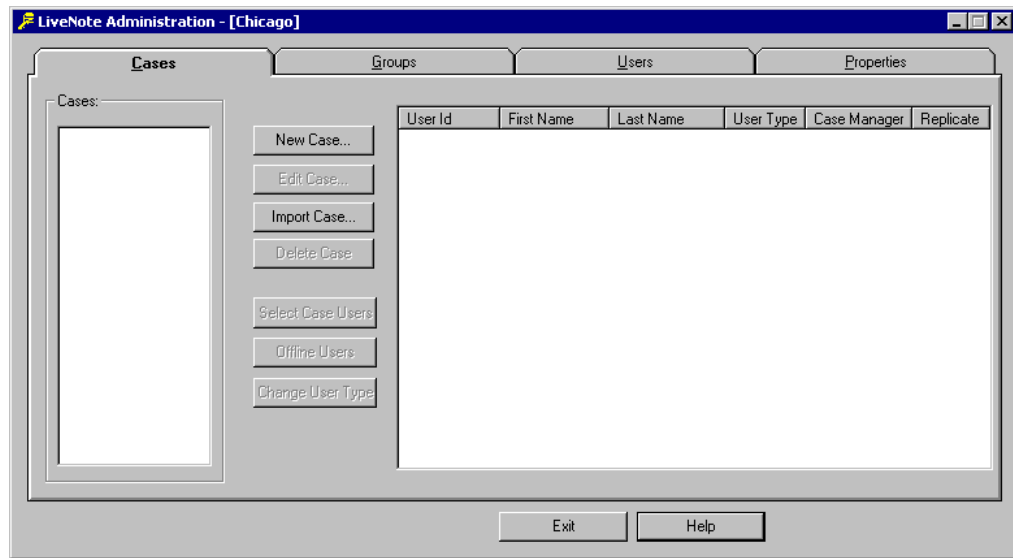
Creating a secure case

Secure cases are stored in the secure cases folder and can only be accessed by those users that you assign to the case. A user must enter their user name and password to work with secure cases.

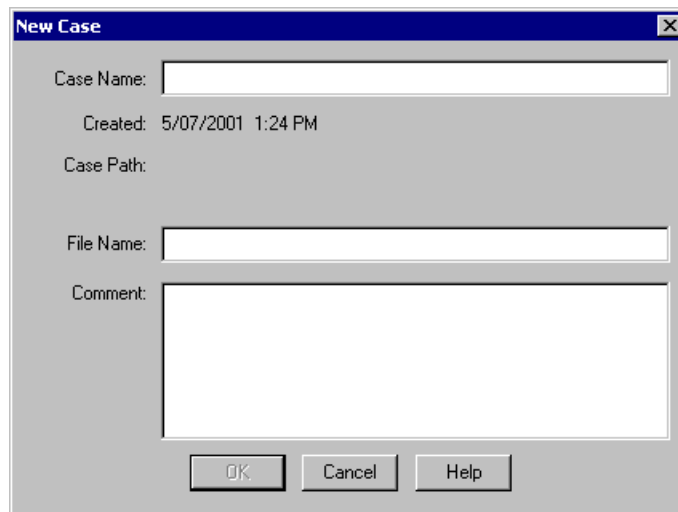
Case names and file names must be unique.

To create a secure case:

1. Click the **Cases** tab. The **Cases** page appears.



2. Click **New Case**. The **New Case** dialog box appears.



3. Type the name of the case in the **Case Name** field. Follow the naming conventions for cases followed in your organization. LiveNote echoes the case name in the **File Name** field and adds the .Ins extension when it saves the file. You can change this file name.

Note: If your file system does not support long file names you will need to change the filename to no more than 8 characters. Special characters, such as spaces are not allowed. Contact your system administrator for information.

4. Type a different filename for the case in the **File Name** field, if required.

5. Type any additional information about the case in the **Comments** field.
6. Click **OK**. The **New Case** dialog box closes and the case is shown in the **Cases** list.

You can now assign users to the case.

Importing a non-secure case to create a secure case

You can import a local case to create a secure case. For secure cases, LiveNote records the author of all annotations. If the case you are importing contains annotations, you must select a user for LiveNote to assign as the author for the existing annotations.

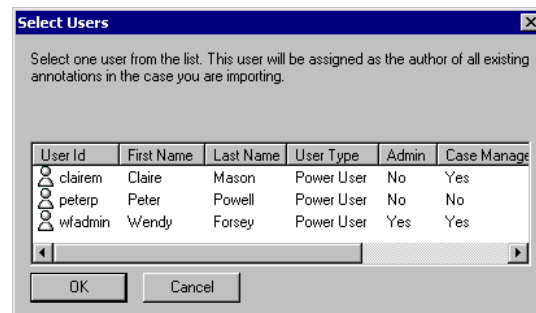
You cannot import an existing non-secure case if another user has opened the case in exclusive mode.

To import a non-secure case:

1. Click the **Cases** tab. The **Cases** page appears.
2. Click **Import Case**. The **Open** dialog box appears.
3. Browse for the folder containing the case you want to import, using the **Look in** list and the Folder list.
4. Select the Livenote case file (.lnt extension) you want to import in the file list.
5. Click **Open**. The **Open** dialog box closes.
 - If the case you want to import has the same case name or file name as the case you are trying to import, the Change Duplicate Name dialog box appears.

As required:

- Type a new name for the case you are importing.
- Type a new file name for the case you are importing.
- If the case you are importing contains annotations, the **Select Users** dialog box appears.



Select the user that you want to assign as the author of the existing annotations, and click **OK**.

The imported case is displayed in the **Cases** list.

You can now assign users to the case.

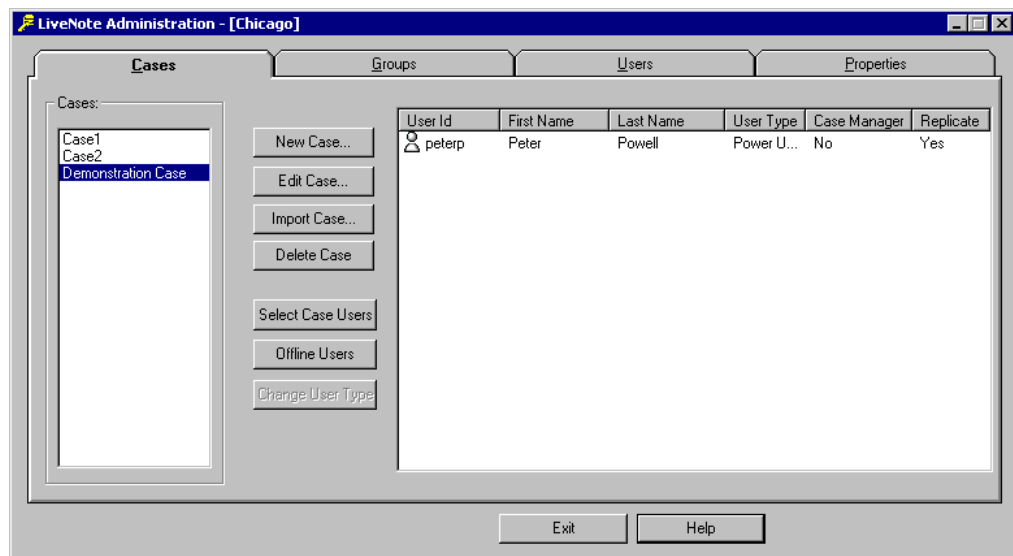
Assigning users and groups to a case

Users can only access those cases that you assign them to. When you assign a user to a case, LiveNote Administration gives the user their default user type and permissions. You can change the user's type and permissions for the case.

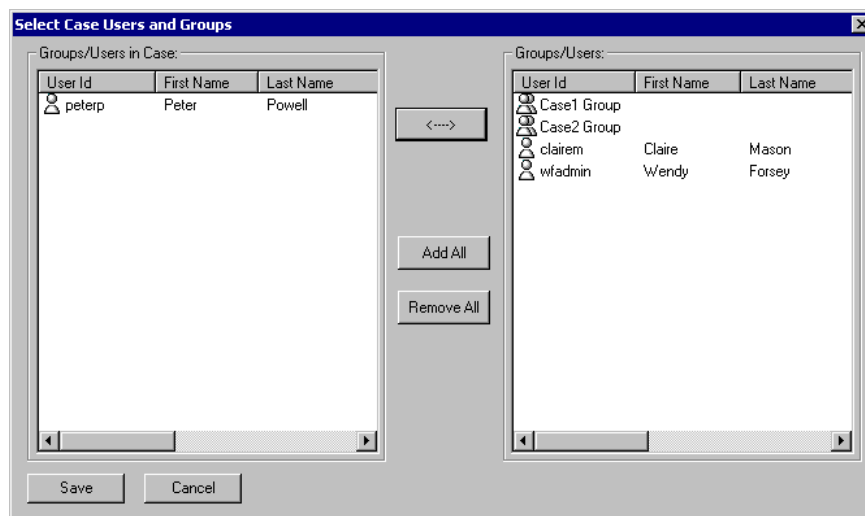
You can also assign a group to a case. Each user in the group has access to the case. You cannot change the user's type and permissions for the case.


To assign users to a case:

1. Click the **Cases** tab. The **Cases** page appears.
2. Select the case you want to assign users to in the **Cases** list. Any users currently assigned to the case are shown in the case users list on the right.




3. Click **Select Case Users**. The **Select Case Users and Groups** dialog box appears.



4. Select each user or group that you want to assign to the current case in the **Groups/Users** list. You can select individual users or groups, or a range of users and groups. Click . The selected users and groups are moved from the **Groups/Users** list to the **Groups/Users in Case** list.

Click **Add All** to add all users and groups to the case.

5. To remove users or groups from the case, select the users and groups you want to remove in the **Groups/Users in Case** list. You can select individual users or a range of users. Click . The selected users are moved from the **Groups/Users in Case** list to the **Groups/Users** list.

Click **Remove All** to remove all users and groups from the case.

6. Click **Save**. The **Select Case Users and Groups** dialog box closes and the selected users are shown in the case groups/users list.
7. You can change the user type and permissions for individual users for this case, if required.
 - a. Double-click on the user in the case groups/user list. The **User Details** dialog box appears.
 - b. Choose the user's type for this case under **User Type**. See *About user types*.
 - c. Select the case-specific permissions for the user under **User Permissions**. See *About user permissions*.
 - d. Click **OK**. The **User Details** dialog box closes.