

# Importing RealLegal® Binder Projects into West Case Notebook or West LiveNote

Version 1.0

Importing RealLegal Binder projects into West Case Notebook or West LiveNote includes the following tasks:

- converting the RealLegal Binder project into a portable case format (PCF) file using the Binder Conversion Utility
- creating a LiveNote Evidence Format™ (LEF™) file using RealLegal Publisher 4.0 for each transcript in the project that includes linked exhibits
- importing the PCF file into West Case Notebook or West LiveNote
- updating the transcripts that have linked exhibits with the LEF files

**Note** If you have projects that you want to bring into West Case Notebook or West LiveNote that were created in RealLegal Binder 6.0 or earlier, you must first open them in RealLegal Binder 7.5.

## Converting a RealLegal Binder Project to a PCF File

To convert a RealLegal Binder project to a PCF file, complete these steps:

1. Access RealLegal Binder.
2. Access the project you want to convert, e.g., **Smith v Jones**.
3. Choose **Launch, RealLegal Binder Conversion Utility** from the Tools menu. The Project Conversion: Select Source Project dialog box is displayed.
4. Click **Browse**. The Source Project dialog box is displayed.
5. Select the file you want to convert, e.g., **smith v jones.pxl**, and click **Open**. The Project Conversion: Select Source Project dialog box is redisplayed.
6. Click **Next**. The Project Conversion: Select Destination Project dialog box is displayed.
7. Click **Browse**. The Destination Binder Project dialog box is displayed.
8. Select a location for the file and click **Open**. The Project Conversion: Select Destination Project is redisplayed.
9. Click **Finish**. The RealLegal Binder Conversion Utility–Summary dialog box is displayed indicating that your file was successfully converted.
10. To convert another project, click **Again**. Otherwise, click **Close**.

**Note** All issues in the project are included in the PCF file.

For assistance using West Case Notebook, call 1-800-290-9378 or e-mail [west.livenote@thomson.com](mailto:west.livenote@thomson.com).

For free reference materials, visit [west.thomson.com/support/user-guide/livenote-case-notebook.aspx](http://west.thomson.com/support/user-guide/livenote-case-notebook.aspx).

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## Creating a LEF File

To create a LEF, file you must first import the project with the transcripts and exhibits into RealLegal Publisher, then save each transcript with its linked exhibits as a LEF file.

### IMPORTING TRANSCRIPTS AND EXHIBITS INTO REALLEGAL PUBLISHER 4.0

To import your transcripts and exhibits into RealLegal Publisher 4.0, complete these steps:

1. Access RealLegal Publisher 4.0.
2. Click the **New Bundle** button at the top of the window. The New Bundle dialog box is displayed.
3. Type a name, e.g., **Smith**, in the *Plaintiff* text box.
4. Type a name, e.g., **Jones**, in the *Defendant* text box.
5. Type a case number in the *Case Number* text box, if desired.
6. Select a case type from the *Case Type* drop-down list, if desired.
7. Type a client name, e.g., **Smith**, in the *Client* text box.
8. Type a reference number in the *Reference* text box, if desired.
9. Click **OK**. The bundle is displayed under Bundle Title in the RealLegal Publisher window.
10. Select the bundle you created and choose **Import Binder Project** from the Tools menu. The Project to Import dialog box is displayed.
11. Click **Browse**. The Open dialog box is displayed.
12. Select the project, e.g., **smith v jones.pxl**, and click **Open**. The Project to Import dialog box is redisplayed.
13. Click **Next**. The Project Logon dialog box is displayed.
14. Type your username and password for the project in the *User Name* and *Password* text boxes and click **OK**. The Transcript Selection dialog box is displayed.
15. Select the check boxes next to the transcripts you want to include in the bundle and click **Next**. The Exhibit Selection dialog box is displayed.
16. Select the check boxes next to the exhibits you want to include in the bundle and click **Finish**. The transcripts are listed under Transcripts and the exhibits are listed under Documents in the RealLegal Publisher window.

### SAVING A TRANSCRIPT AS A LEF FILE

To save a transcript with linked exhibits as a LEF file, complete these steps:

1. Select the transcript you want to save as a LEF file and choose **Save as LiveNote (LEF, PTF)** from the File menu. The Save Transcript As LiveNote dialog box is displayed.
2. Select the location for your file and click **Save**.  
**Note** It is recommended that you save the LEF file in the same location that you saved the PCF file.
3. Repeat steps 1 and 2 for each transcript you want to save as a LEF file.

## Importing the Project into West Case Notebook or West LiveNote

To import the project in West Case Notebook or West LiveNote, complete these steps:

1. Access West Case Notebook or West LiveNote.
2. When the Open Case dialog box is displayed, select a case and click **OK**.
3. Click the **New** arrow on the Main Menu toolbar and choose **Case (from File)** from the menu. The Open dialog box is displayed.
4. Select the PCF file, e.g., **Smith v Jones.pcf**, and click **Open**. The Save As dialog box is displayed.
5. Type a name for the case, e.g. **Smith v Jones**, in the *File name* text box and click **Save**.
6. The message *Would you like to add the new case to your case list* is displayed. Click **Yes**.
7. The case with the transcripts is displayed in the left pane.

## Updating a Transcript with a LEF File

To update a transcript that includes linked exhibits with a LEF file, complete these steps:

1. Right-click the transcript you want to update and choose **Properties** from the menu. The Transcript Properties dialog box is displayed.
2. Select **Draft** from the *Status* drop-down list.
3. Click **OK**.
4. Right-click the transcript you want to update and choose **Update Draft** from the menu. The Update Transcript–Transcript File dialog box is displayed.
5. Click **Browse** to display the Browse for Transcript Files dialog box.
6. Select the LEF file and click **Open**. The Update Transcript–Transcript File dialog box is redisplayed.
7. 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.
8. The *Import exhibits* check box is automatically selected. If you do not want to import exhibits, clear this check box.
9. The *Import Annotations* check box is automatically selected. If you do not want to import annotations, clear the check box.
10. 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.
11. 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.
12. Click **Finish**. The Update Transcript–Update Completed dialog box is displayed.
13. Click **Close**.

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