



UPGRADING CASES

WEST CASE NOTEBOOK/WEST LIVENOTE

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To browse and order free West Case Notebook or West LiveNote reference materials, visit west.thomson.com/support/user-guide/livenote-case-notebook.aspx. West Case Notebook and West LiveNote also contain valuable online Help.

About This Guide

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

Information in this guide is current through September 2011 (version 2.6).

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1 Introduction

This guide describes how to do the following:

- For Local Cases:
 - upgrade LiveNote SR cases to West Case Notebook version 2.0 or later or West LiveNote version 2.0 or later cases
 - upgrade West Case Notebook version 1.0 or later or West LiveNote version 1.0 or later cases to West Case Notebook 2.0 or later or West LiveNote 2.0 or later cases
- For LiveNote Repositories:
 - upgrade LiveNote Repository version 8 to West LiveNote Repository version 2.0 or later
 - upgrade LiveNote Repository version 9 or 10 to West LiveNote Repository 2.0 or later
 - upgrade West LiveNote Repository version 1.0 to West LiveNote Repository 2.0 or later
 - access updated cases with West Case Notebook or West LiveNote from West LiveNote Repository 2.0 or later
- For RealLegal Binder Projects:
 - open RealLegal Binder projects in West Case Notebook 2.0 or later or West LiveNote 2.0 or later
 - import RealLegal Binder projects into West LiveNote Administration version 2.0 or later

2 Upgrading Local Cases

Upgrading LiveNote SR Cases

To upgrade LiveNote SR Cases to West Case Notebook 2.0 or later or West LiveNote 2.0 or later cases, complete these steps:

1. Access West Case Notebook or West LiveNote. The Open Case dialog box is displayed (Figure 2-1).

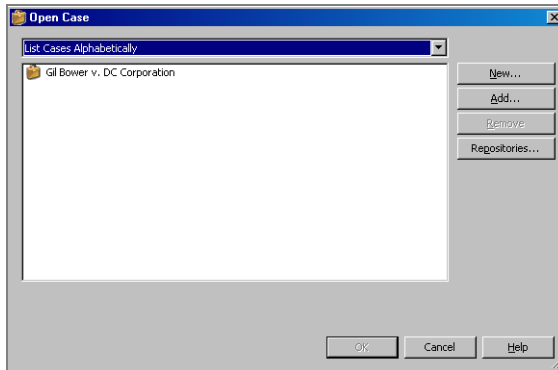


Figure 2-1. Open Case dialog box

2. Click **Add**. The Open dialog box is displayed (Figure 2-2).

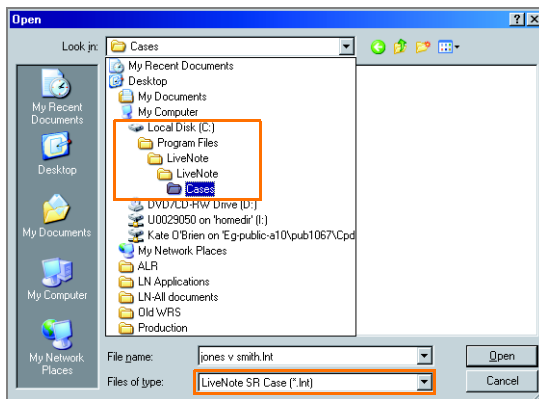


Figure 2-2. Open dialog box

3. Select **LiveNote SR Case (*.Int)** from the *File of type* drop down list.
4. Select the *.Int file for the case you want to open.

Notes

- If you use Windows XP, LiveNote SR cases are located in C:\ProgramFiles\LiveNote\LiveNote\Cases, as shown in (Figure 2-2).
 - If you use Windows Vista, LiveNote SR cases are located in C:\Users\Public\Public Documents\Cases.
5. Click **Open**. The message *This case was created with an earlier version of LiveNote. It must be upgraded before it can be used. Do you want to continue?* is displayed.

6. Click **Yes**. The Save As dialog box is displayed (Figure 2-3). By default, West Case Notebook or West LiveNote cases are saved as LiveNote Project (*.lnp) files in C:\Documents and Settings\All Users\Shared Documents\ West LiveNote\Cases.

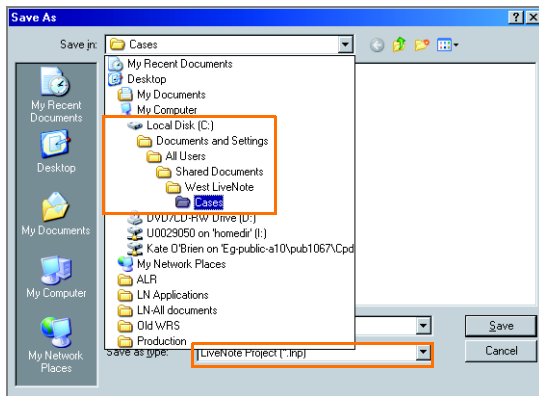


Figure 2-3. Save As dialog box

7. Click **Save**.The case is listed in the Open Case dialog box.
8. To open the case, select the case and click **OK**.

Upgrading West Case Notebook or West LiveNote Cases

When you install version 2.0 or later of West Case Notebook or West LiveNote, the previous versions are automatically uninstalled. When you use version 2.0 or later to open cases that you created with previous versions of West Case Notebook or West LiveNote, version 2.0 or later upgrades the cases as it opens them.

3 Upgrading LiveNote Repositories

Upgrading LiveNote Repository Version 8

Note Version 8 refers to any LiveNote Repository version 8, e.g., version 8.2 or 8.3.

To upgrade LiveNote Repository version 8 to West LiveNote Repository 2.0 or later, complete these steps:

1. Access West LiveNote Administration on the computer with LiveNote Administration version 8. The Administrator Login for [repository name] dialog box is displayed.
2. Type your username and password in the *Username* and *Password* text boxes and click **Login**. The West LiveNote Administration window is displayed.
3. From the Repository menu, choose **Import Repository (version 8)**. The Select the Repository (Secure Case Folder) to Import dialog box is displayed.
4. Select the **sc.lnr** file and click **Open**. All users and groups that are not already in the repository are imported. If case information is stored in the sc.lnr file, the Select Cases to Import dialog box is displayed (Figure 3-1).

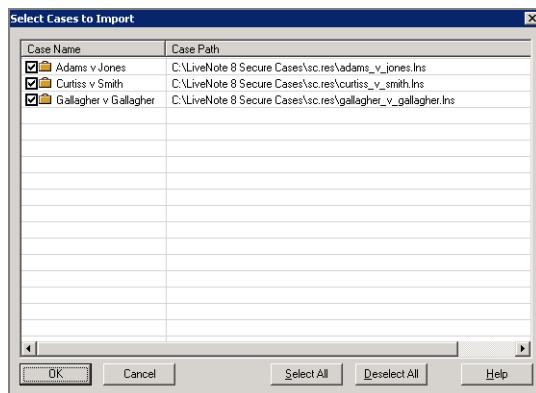


Figure 3-1. Select Cases to Import dialog box

5. By default, all cases are selected. To exclude a case from the upgrade, clear its check box.
6. Click **OK**. If the cases contain annotations, the Select an Owner for the Annotations dialog box is displayed.
7. Select an owner and click **OK**. The Select Case Import Destination dialog box is displayed.
8. Click **Browse**. The Browse for Folder dialog box is displayed.
9. Select a destination directory for the upgraded cases and click **OK**. The Select Case Import Destination dialog box is redisplayed.
10. Click **OK**. Imported cases, users and groups are listed on the Cases, Users, and Groups tabs respectively.

Upgrading LiveNote Repository Version 9 or 10

To upgrade LiveNote Repository version 9 or 10 to West LiveNote Repository 2.0 or later, complete these steps:

1. Access West LiveNote Administration on a computer with LiveNote Administration 9 or 10. The Administrator Login for [repository name] dialog box is displayed.
2. Type your username and password in the *Username* and *Password* text boxes and click **Login**. The West LiveNote Administration window is displayed.

- From the Repository menu, choose **Manage**. The Manage Repositories dialog box is displayed (Figure 3-2).

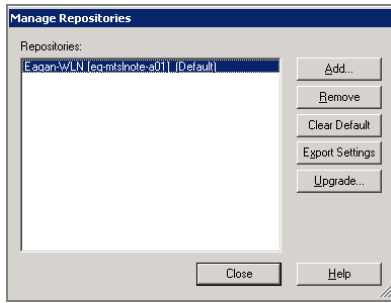


Figure 3-2. Manage Repositories dialog box

- Click **Upgrade**. The Upgrade Repositories dialog box is displayed (Figure 3-3).

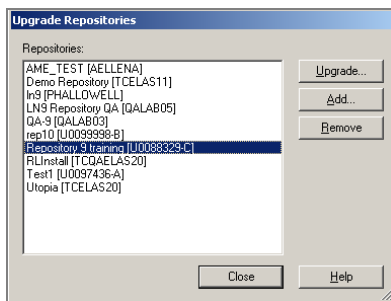


Figure 3-3. Upgrade Repositories dialog box

- Select a repository and click **Upgrade**. The Repository Upgrade Options dialog box is displayed.
- Type the administrator's username and password for the old repository in the *Username* and *Password* text boxes.
- Click the **Browse** button. The Browse for Folder dialog box is displayed.
- Select the destination directory for the upgraded cases and click **OK**. The Repository Upgrade Options dialog box is redisplayed (Figure 3-4).

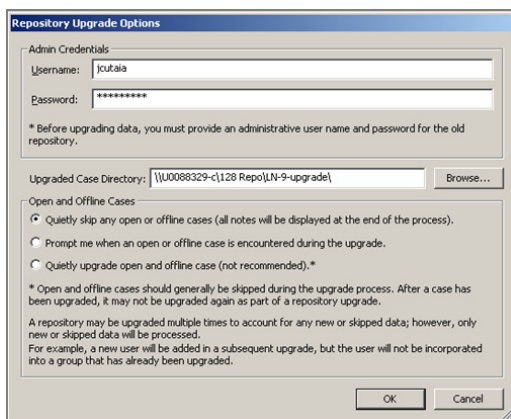


Figure 3-4. Repository Upgrade Options dialog box

9. By default, *Quietly skip any open or offline cases* is selected. If desired, select **Prompt me when an open or offline case is encountered during the upgrade** or **Quietly upgrade open and offline case**. (Select this last option only if cases are inappropriately flagged as open.)
10. Click **OK**. The Repository Upgrade Results dialog box is displayed (Figure 3-5).

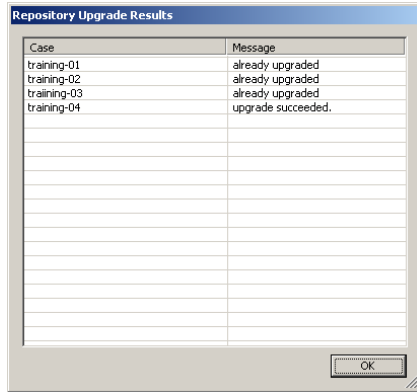


Figure 3-5. Repository Upgrade Results dialog box

11. Click **OK**. The Upgrade Repositories dialog box is displayed.
12. To upgrade another repository, select it and then click **Upgrade**. Otherwise, click **Close**. The Manage Repositories dialog box is displayed.
13. Click **Close**.

Note See Appendix B for information on linking from a transcript annotation sent from LiveNote version 8.3 or later to CaseMap to West Case Notebook version 2.6 or West LiveNote version 2.6.

Upgrading West LiveNote Repository Version 1.0 or Later

West LiveNote Repository version 1.0 or later is upgraded automatically when you install West LiveNote Administration 2.0 or later. When you install West LiveNote Administration 2.0 or later, the previous versions are automatically uninstalled.

All users of a secure case must use the same version of West Case Notebook or West LiveNote. For example, if a secure case is upgraded to West LiveNote 2.0 or later, all users working on the case must use West LiveNote 2.0 or later.

If you are working in a West LiveNote 2.0 or later case, then revert to using West LiveNote version 1.0, you must manually rebuild the search index for the case. To rebuild the search index, choose **Advanced, Rebuild Search Index** from the Tools menu (Figure 3-6).

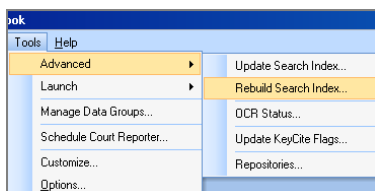


Figure 3-6. Tools menu

Accessing Updated Cases in West Case Notebook or West LiveNote

To access updated cases in West Case Notebook or West LiveNote, complete these steps:

1. Access West Case Notebook or West LiveNote. Or in an open case, choose **Open Case** from the File menu. The Open Case dialog box is displayed (Figure 3-7).

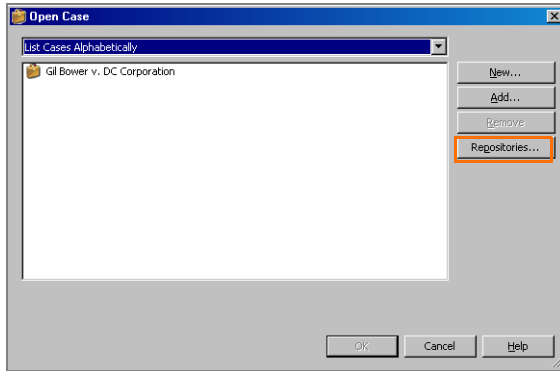


Figure 3-7. Open Case dialog box

2. Click **Repositories** in the Open Case dialog box. The Repositories dialog box is displayed (Figure 3-8).

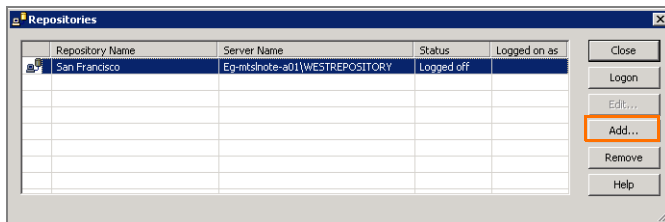


Figure 3-8. Repositories dialog box

3. If your repository is not listed in the Repositories dialog box, click **Add** to display the Add Repository Server dialog box (Figure 3-9).

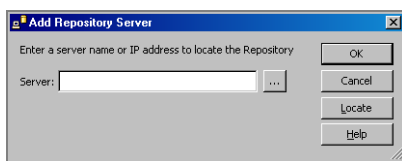


Figure 3-9. Add Repository Server dialog box

4. Type the name of the server in the *Server* text box or click **Locate** to automatically search for the repository.
5. Click **Ok**. The Repositories dialog box is redisplayed.
6. Select the repository that you want to log on to and click **Logon**. The Logon to [Repository Name] dialog box is displayed (Figure 3-10).

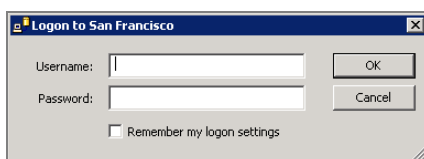


Figure 3-10. Logon to [Repository Name] dialog box

7. Type your username and the password in the *Username* and *Password* text boxes.
8. Select the **Remember my logon settings** check box if you want West LiveNoteCase Notebook to remember your username and password.
9. Click **OK**. The Repositories dialog box is redisplayed (Figure 3-11).

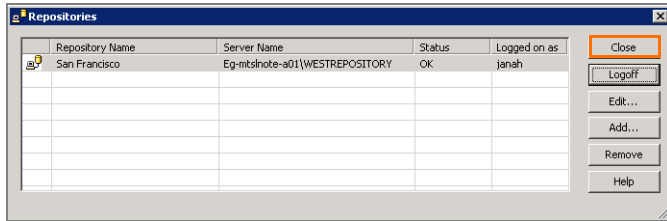


Figure 3-11. Repositories dialog box

10. Click **Close**. The Open Case dialog box is redisplayed with a list of the cases to which you are assigned (Figure 3-12).

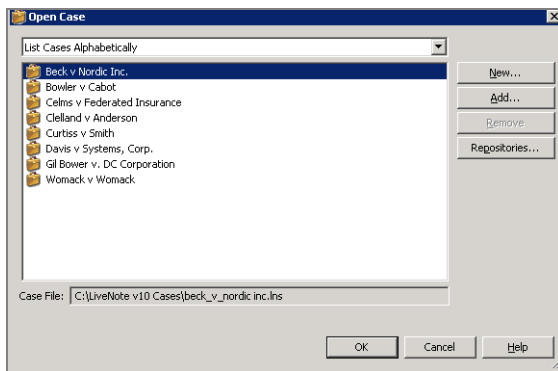


Figure 3-12. Open Case dialog box

Upgrading to West Case Notebook TS or West LiveNote TS Repositories

Use the same steps outlined above to upgrade to West Case Notebook TS or West LiveNote TS repositories.

4 Importing RealLegal Binder Cases

Opening a RealLegal Binder Case in West Case Notebook or West LiveNote

You can open a RealLegal Binder case, version 5 or later, in West Case Notebook 2.0 or later or West LiveNote 2.0 or later. To open a RealLegal Binder case, complete these steps:

1. Choose **Open Case** from the File menu to display the Open Case dialog box (Figure 4-1).

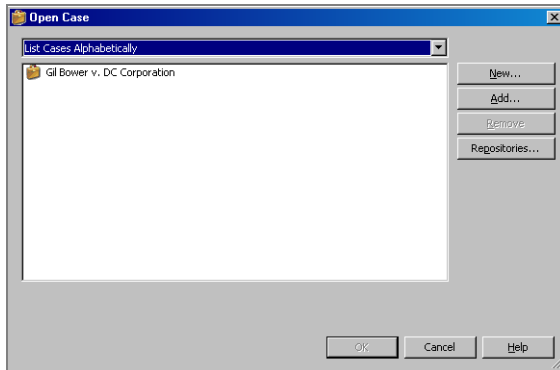


Figure 4-1. Open Case dialog box

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

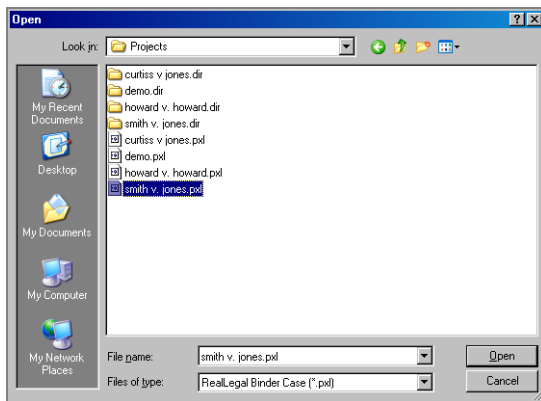


Figure 4-2. Open dialog box

3. Choose **RealLegal Binder Case (.pxl)** from the *Files of Type* drop-down list.
4. Select the .pxl file for the case you want to import and click **Open**.
5. 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.

6. Type a name for the file in the *File name* text box and click **Save**. The case is listed in the Open Case dialog box (Figure 4-3).

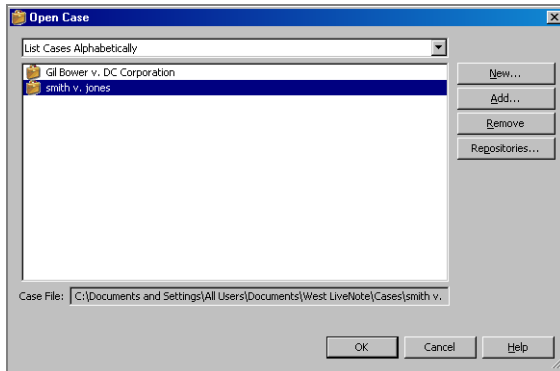


Figure 4-3. Open Case dialog box

7. Select the case and click **OK**.

Note The RealLegal Binder case opens as a local case with no assigned users. For further information on the conversion of RealLegal Binder cases to West Case Notebook version 1.5 or West LiveNote version 1.5 cases, see Appendix A: Converting RealLegal Binder Cases to West Case Notebook or West LiveNote Cases.

Importing a RealLegal Binder Case into West LiveNote Administration

You can import a RealLegal Binder case, version 5 or later, into West LiveNote Administration 2.0 or later. To import a RealLegal Binder case, complete these steps:

1. Access West LiveNote Administration.
2. From the Case menu, choose **Import**. The Select the Case to Import dialog box is displayed (Figure 4-4).

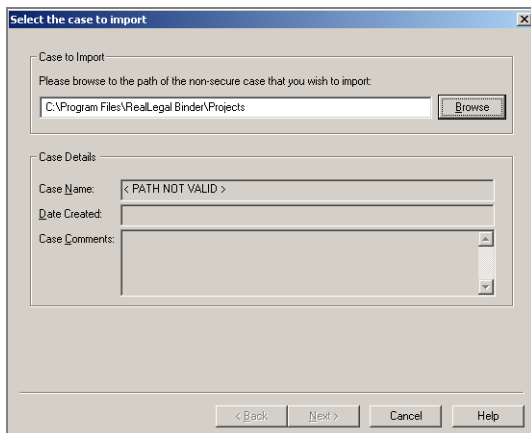


Figure 4-4. Select the Case to Import dialog box

3. Click **Browse** to display the Browse for a Local Case dialog box (Figure 4-5).

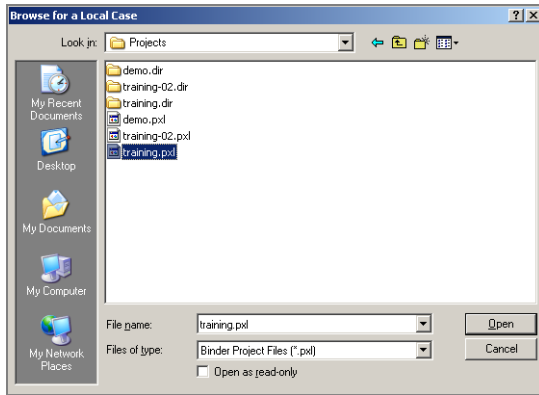


Figure 4-5. Browse for a Local Case dialog box

4. Go to the folder where your RealLegal Binder cases are located and select the .pxl file for the case you want to import. By default, RealLegal Binder cases are located in C:\Program Files\RealLegal Binder\Projects.
5. Click **Open**. The Select the Case to Import dialog box is redisplayed (Figure 4-6).

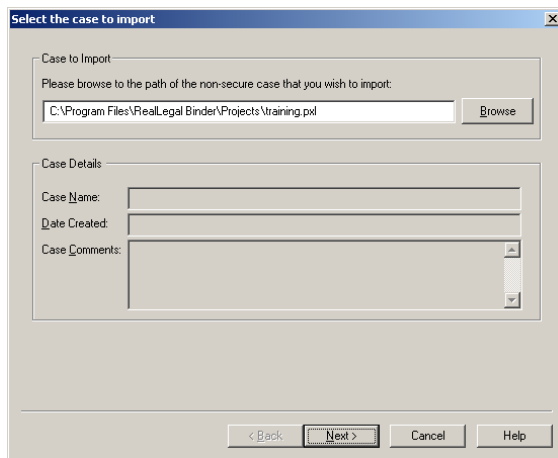


Figure 4-6. Select the Case to Import dialog box

- Click **Next**. The Select the Destination Location dialog box is displayed (Figure 4-7).

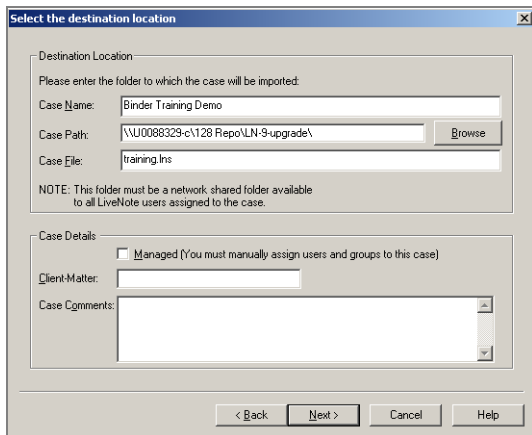


Figure 4-7. Select the Destination Location dialog box

- Type a case name in the *Case Name* text box.
- Type a different location in the *Case Path* text box, if desired.
- Type a different case file name in the *Case File* text box, if desired.
- Under *Case Details*, select the **Managed** check box if you want to manually add users and groups to this case.
- Type a client-matter number in the *Client-Matter* text box, if desired.
- Type a comment in the *Case Comments* text box, if desired
- Click **Next** to display the Import Completed dialog box.
- Click **Finish**. Your case is added to the list of secure cases in the repository on the Cases tab (Figure 4-8).

Case Name	Location	Client-Matter
Binder-Demo	\\U0088329-c\128 Repo\LN-9-upgrade\d...	
Binder Training Demo	\\U0088329-c\128 Repo\LN-9-upgrade(t...	
Gil Bower v. DC Corpo...	\\Q3-mcbain\128 Repo\ DEMOC_...ins	0055-100955...
lef	\\U0088329-c\128 Repo\lef.ins	
QA vs Repository 128	\\U0088329-c\128 Repo\QA vs Reposito...	
training-03	\\U0088329-c\128 Repo\LN-9-upgrade(t...	
training-01	\\U0088329-c\128 Repo\LN-9-upgrade(t...	
training-02	\\U0088329-c\128 Repo\LN-9-upgrade(t...	
training-04	\\U0088329-c\128 Repo\LN-9-upgrade(t...	

Figure 4-8. West LiveNote Administration Cases tab

Appendix A: Converting RealLegal Binder Cases

When you open a RealLegal Binder case in West Case Notebook version 1.5 or West LiveNote version 1.5, 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 <ul style="list-style-type: none">transcript texttranscript properties: Type, Status, Last, First, Volume, Date, Title, Taking Attorney, For, Commentlinks to documents from transcriptssignature for signed transcripts (version 7.0 and later)video sync information	Transcripts <ul style="list-style-type: none">transcript properties: Time, Plaintiff, Defendant
Documents <ul style="list-style-type: none">document contentsdocument properties: Type, Author, Recipient, Bates Range, Date, OCR information	Documents <ul style="list-style-type: none">document properties: Titleexhibit check box data; exhibit number; exhibit prefix
Annotations <ul style="list-style-type: none">all annotationsissues, including name and colorattachment URLs are preservedcomments converted to notes	Annotations <ul style="list-style-type: none">chronology dateactive issue propertiesannotations authors only converted when imported into a secure case
Search groups <ul style="list-style-type: none">search groups converted to data groupssearch group name converted to data group titletranscripts and documents from the search group converted to Data Group	Search groups <ul style="list-style-type: none">preprogrammed search groups that come with RealLegal Bindersaved reports

Appendix B: Send to CaseMap from LiveNote–Link Conversion Utility

If you sent transcript annotations from LiveNote version 8.3 or later to CaseMap, you must use the Link Conversion Utility to view the full annotated transcript in West Case Notebook version 2.6 or West LiveNote version 2.6. It is recommended that you use the utility after you upgrade your LiveNote version 8.3 or later cases to West Case Notebook version 2.6 or West LiveNote version 2.6 cases.

Notes

- You can view annotations in West Case Notebook version 2.6 or West LiveNote version 2.6 that you sent from LiveNote version 8.3 or later.
- The transcript in West Case Notebook or West LiveNote must have the same name as the transcript in LiveNote from which you sent the annotation.
- If the page and line numbers in the transcript change during the upgrade process, you may need to scroll up or down a few lines in the transcript to view the annotation.

To download the utility, go to west.thomson.com/software/case-notebook/cm-livenote-utility/default.aspx and click **Proceed with Download**.

To use the Link Conversion Utility, complete these steps:

1. Double-click the **Link Conversion Utility** icon () on your desktop. The Open File–Security Warning dialog box is displayed (Figure 1).

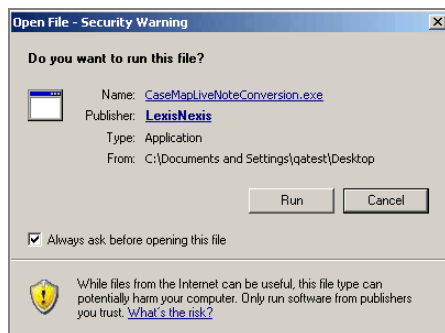


Figure 1. Open File–Security Warning dialog box

2. Click **Run**. A dialog box is displayed (Figure 2).

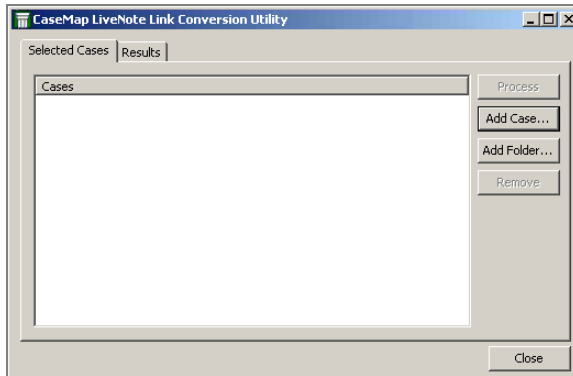


Figure 2. CaseMap LiveNote Link Conversion Utility

3. Click **Add Case**. The Select dialog box is displayed (Figure 3).

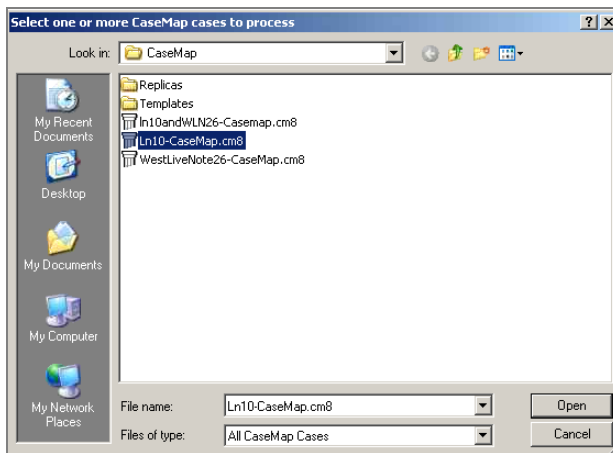


Figure 3. Select One or More CaseMap Cases to Process dialog box

4. Select the CaseMap cases containing the LiveNote transcript annotation links you want to convert and view in West Case Notebook or West LiveNote.
5. Click **Open**. Your selected case is listed on the Selected Cases tab (Figure 4).

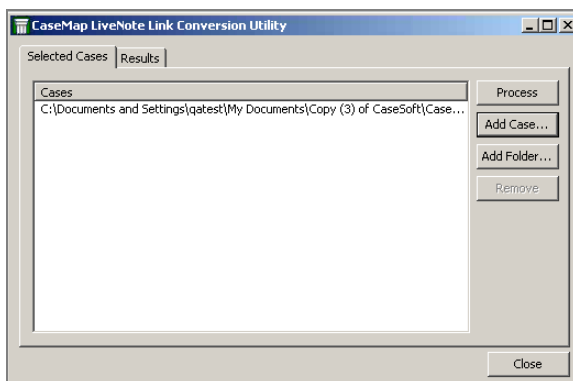


Figure 4. CaseMap LiveNote Link Conversion Utility dialog box—Selected Cases tab

6. Click **Process**. A message indicating that the case was updated is displayed on the Results tab (Figure 5).

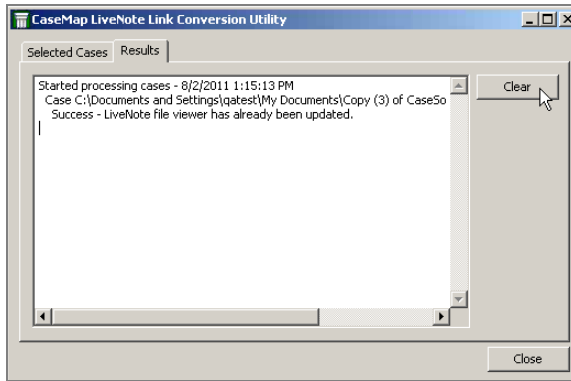


Figure 5. CaseMap LiveNote Link Conversion Utility dialog box—Results tab

7. Click **Close**.
8. Access CaseMap and open the case with the transcript annotations you sent from LiveNote.
9. Click the **paper clip** icon (📎) next to the annotation you want to view in West Case Notebook or West LiveNote, then click the name of the transcript. If the case with the transcript annotation is not open in West Case Notebook or West LiveNote, the Open Case dialog box is displayed. Select the case and click **OK**. The transcript opens and the annotation is displayed in the right pane.

