



# CONNECTING TO REALTIME

WEST CASE NOTEBOOK/WEST LIVENOTE

MARCH 2011



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WEST CASE NOTEBOOK/WEST LIVENOTE

MARCH 2011

# West Customer Service

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## West Case Notebook or West LiveNote Assistance

If you have general or technical questions about West Case Notebook or West LiveNote, call West LiveNote Customer Technical Support at **1-800-290-9378**, Monday through Friday, 6:30 a.m. to 7:30 p.m. central time. You can also send an e-mail message to [west.livenote@thomson.com](mailto:west.livenote@thomson.com).

For questions about LiveNote Stream or tokens, call **1-800-548-3668** (option 2), Monday through Friday, 6:30 a.m. to 7:30 p.m. central time. You can also send an e-mail message to [support@livenote.com](mailto:support@livenote.com).

## Billing and Account Assistance

For billing and account assistance, call **1-800-328-4880**.

Billing and account assistance is also available online at [west.thomson.com/support](http://west.thomson.com/support).

## Reference Materials

To browse and order free West Case Notebook or West LiveNote reference materials, visit [west.thomson.com/support/user-guide/livenote-case-notebook.aspx](http://west.thomson.com/support/user-guide/livenote-case-notebook.aspx). West Case Notebook or 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 and 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 March 1, 2011.

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# 1 Introduction

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This guide provides the information needed to connect to Realtime through West Case Notebook or West LiveNote. The guide covers using a serial connection, LiveNote Stream, and tokens and includes a list of USB to serial adapters.

## **Notification Requirements**

If you are using LiveNote Stream to connect to Realtime, you must notify the court reporter *24 hours in advance* to view transcript text or *72 hours in advance* to view video and text. For more information on LiveNote Stream, see "Using LiveNote Stream" on page 3.

## **Finding a Certified Court Reporter**

LiveNote has certified many court reporters who can connect you to a Realtime session. To locate a certified court reporter in your area, go to [westapps.west.thomson.com/wds/PartnerList](https://westapps.west.thomson.com/wds/PartnerList).

## 2 Connecting to Realtime

### Connecting with a Serial Connection

If you want to connect to Realtime using serial cables, your computer must have a serial port. If your computer has only a USB port, you will need to provide a USB to serial adapter. (For information about serial adapters, see “USB to Serial Adapters” on page 14.) If a USB to serial adapter is not available, you can connect to Realtime over the Internet via LiveNote Stream. Contact the court reporter to schedule the session.

**Note** You can test the serial connection on your computer before you attend a Realtime session. See “Using Serial Writer” on page 6 for information on this feature.

To connect to Realtime once all the cables are in place, 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, then choose **Realtime Transcript** from the menu. The Connect to Realtime dialog box is displayed (Figure 2-1).

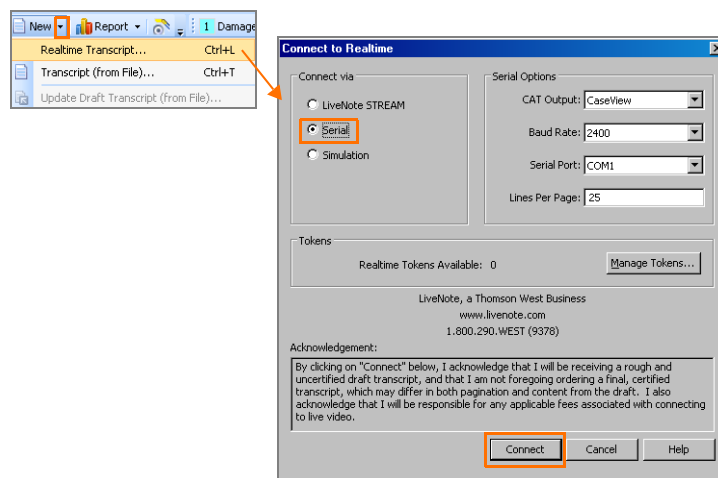


Figure 2-1. Connect to Realtime dialog box–Serial connection

4. Under *Connect via*, select **Serial**. The court reporter will give you the necessary settings for connecting to the reporter’s CAT (computer–aided transcription) system. You will need to know the required serial port setting.
5. Click **Connect** to connect to Realtime.

**Note** The transcript is titled *Realtime* by default and listed under *Transcripts* in the left pane. To change the title of the transcript, right-click it and choose **Properties** from the menu. The Transcript Properties dialog box is displayed. Type a different title for the transcript in the *Title* text box and click **OK**.

## Using LiveNote Stream

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

You must notify the court reporter *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 e-mail with the required username and password. For further information on planning a Realtime session, download a free copy of *Quick Tips for Planning a Realtime Session* at [west.thomson.com/support/user-guide/livenote-case-notebook.aspx](http://west.thomson.com/support/user-guide/livenote-case-notebook.aspx).

**Note** In order to view the video segment, you must use Internet Explorer and Windows Media Player 9 or later. You must also unblock pop-up windows.

### ACCESSING LIVENOTE STREAM THROUGH WEST CASE NOTEBOOK OR WEST LIVENOTE

To connect to Realtime using LiveNote Stream through 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, then choose **Realtime Transcript** from the menu. The Connect to Realtime dialog box is displayed (Figure 2-2).

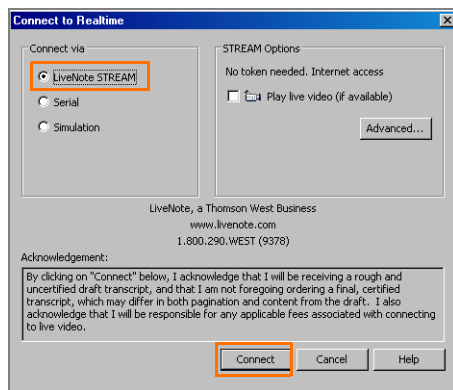


Figure 2-2. Connect to Realtime dialog box—LiveNote Stream connection

4. Under *Connect via*, select **LiveNote Stream**.
5. If video is available and you want to view it, select the **Play live video** check box.
6. Click **Connect** to display the LiveNote Stream Login dialog box.
7. Type the username and password sent to you by LiveNote Central and click **OK** to display the Connect to LiveNote Stream dialog box.
8. Select the session you want to attend and click **OK**. The Realtime deposition transcript text and video are displayed.

## SENDING AN INSTANT MESSAGE

To send an instant message, complete these steps:

1. Type your message in the text box under *Stream* in the left pane (Figure 2-3).
2. Click **Send** to send the message to your chat group. Or select an individual from the *Send To* drop-down list and click **Send**.

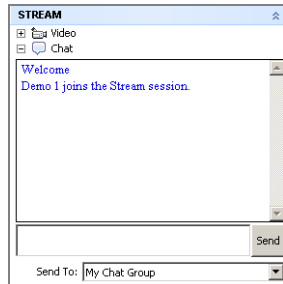


Figure 2-3. Instant message

## ACCESSING LIVENOTE STREAM THROUGH INTERNET EXPLORER

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

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

1. Go to [www.livenote.com/stream](http://www.livenote.com/stream).
2. Type the username and password sent to you by LiveNote Central and click **Go** to display a list of your sessions.
3. Select the session you want to attend and click **Go**. The Realtime session transcript text and video are displayed (Figure 2-4).

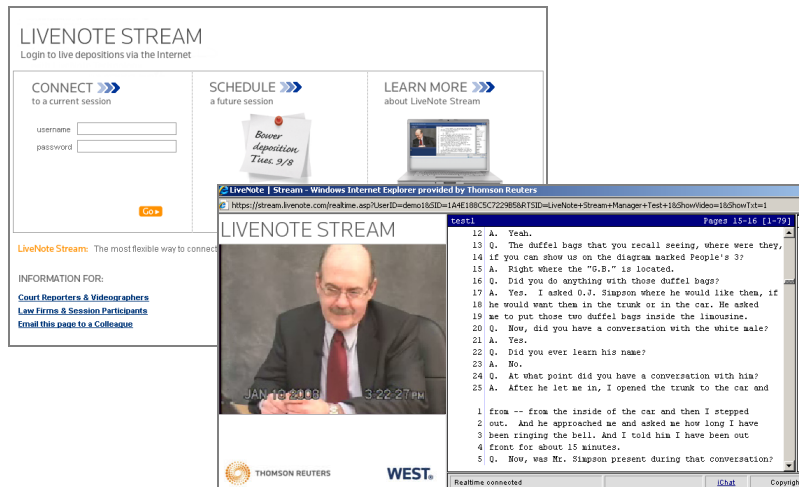


Figure 2-4. LiveNote Stream

## ACCESS TO FEATURES IN LIVENOTE STREAM

When you view a Realtime session using Internet Explorer, you are able to hear the audio and see the video and streaming transcript text. You can also stop and start the transcript text. When you view a Realtime session using

West Case Notebook or West LiveNote software, you have access to all the tools in West Case Notebook or West LiveNote. Below is a chart showing the features available with LiveNote Stream.

West Case Notebook or West LiveNote Features	LiveNote Stream Through Internet Explorer	LiveNote Stream Through West Case Notebook or West LiveNote
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		■

## 3 Using Serial Writer

LiveNote Serial Writer is a utility that allows you to test the serial connection of a computer running LiveNote. It sends a test transcript from a test computer to the West Case Notebook or West LiveNote computer. To complete the test, you will need to install a cable between the two computers (you can use a serial-to-serial Laplink, real-time send/receive, or null modem cable), prepare the West Case Notebook or West LiveNote computer to receive the test transcript, access Serial Writer on the test computer, and run the Serial Writer utility.

### Preparing the West Case Notebook or West LiveNote Computer

Once the cable is in place, you must prepare the West Case Notebook or West LiveNote computer to receive the test transcript by creating a test transcript and configuring the computer options.

#### CREATING A TEST TRANSCRIPT

To create a test transcript, 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, then choose **Realtime Transcript** from the menu. The Connect to Realtime dialog box is displayed (Figure 3-1).

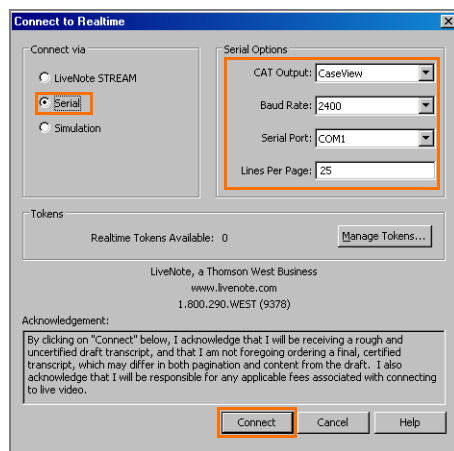


Figure 3-1. Connect to Realtime dialog box–Serial connection

## CONFIGURING THE COMPUTER OPTIONS

To configure the computer options, complete these steps:

1. Under *Connect via*, select **Serial**.
2. Under *Serial Options*, the CAT output and baud rate must match those of the test computer.
  - From the *CAT Output* drop-down list, choose **CaseView**.
  - From the *Baud Rate* drop-down list, choose **2400**.
  - From the *Serial Port* drop-down list, choose the port for the incoming connecting cable. This does not need to match the test computer's port.
3. Click **Connect** to receive the test transcript.

**Note** If you use tokens, a message indicating that you need a token to connect is displayed. You can test your serial connection free of charge. Call 1-800-290-9378 to receive a free token. For information on receiving tokens, see "Using Tokens" on page 9.

### Accessing Serial Writer

Serial Writer must be installed on the test computer to access it. To install Serial Writer, go to [west.thomson.com/software/serial-writer/default.aspx](http://west.thomson.com/software/serial-writer/default.aspx) to display the LiveNote Serial Writer download page. Follow the instructions to download Serial Writer.

To access Serial Writer, choose **All Programs** from the Start menu, then choose **LiveNote, Tools**, and **Serial Writer** from the submenus. The LiveNote Serial Writer dialog box is displayed (Figure 3-2).

## Testing the Serial Connection

To test the serial connection, complete these steps:

1. From the *Port Name* drop-down list, choose the port for the outgoing connecting cable. This does not need to match the port for the West Case Notebook or West LiveNote computer.
2. Click **Selected Port Properties** to display the Port Properties dialog box. From the *Baud Rate* drop-down list, choose 2400. Then click OK.
3. Under *Select a File*, click the ellipsis button (...) to display the Open dialog box. Select **CAT Output = CaseView.sim** and click **Open**.
4. Under *Data Transfer Options*,
  - leave the *Parse Every* setting at the default of 300.
  - select the **Resend when end of file is reached** check box to have the test transcript continue transmitting until you stop it manually. If you do not select this check box, the test transcript stops transmitting automatically.
5. Under *Data Transfer*, click **Send the selected file to the selected port**. The test transcript begins transcribing on the West Case Notebook or West LiveNote computer. The data transfer ceases when the end of the transcript has been reached unless you selected the **Resend when end of file is reached** check box.
6. Click **Done** to stop the test.

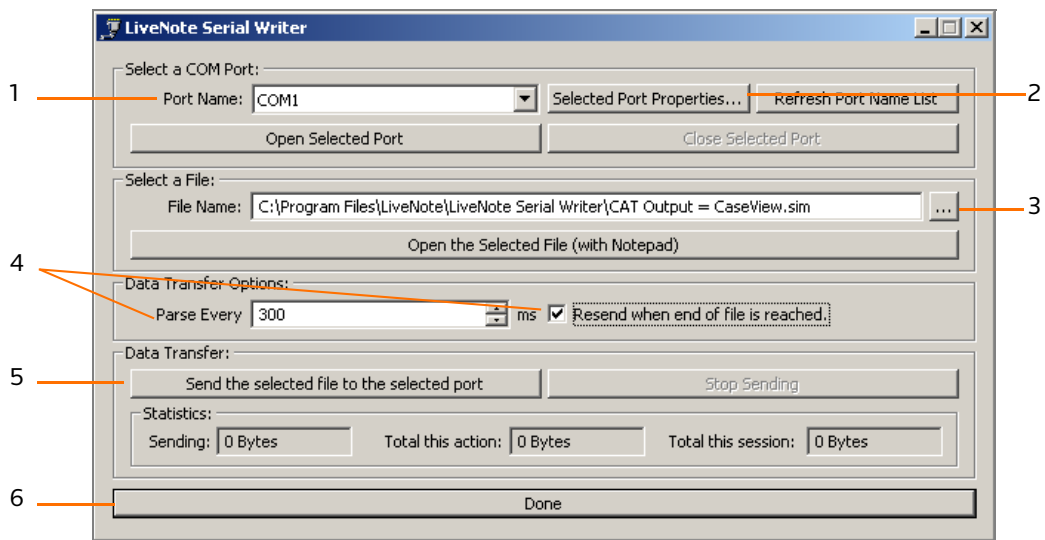


Figure 3-2. LiveNote Serial Writer dialog box

# 4 Using Tokens

## Managing Tokens

You can use an electronic token to connect to Realtime with a serial connection. This ensures that West Case Notebook or West LiveNote software is compliant with real-time patents. You can

- download tokens from your firm’s account to your computer
- transfer tokens from your computer to another West Case Notebook or West LiveNote user
- transfer tokens to your computer from another West Case Notebook or West LiveNote user, a court reporter, or LiveNote by calling 1-800-548-3668
- view a list of token transactions that have been carried out on your computer

### Note

- You do not need tokens if you have a subscription that includes unlimited Realtime.
- If you connect using a token before noon, you can connect to Realtime an unlimited amount of times until midnight, regardless of how often you turn your computer on and off.
- If you connect using a token after noon, you can connect to Realtime an unlimited amount of times for 12 hours, regardless of how often you turn your computer on and off.

## Downloading Tokens to Your Computer

You can download tokens from your firm’s account over the Internet. Your firm will give you the required account number and personal identification number (PIN). To download tokens, 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. To manage tokens, do one of the following:
  - Click the **New** arrow on the Main Menu toolbar, then choose **Realtime Transcript** from the menu to display the Connect to Realtime dialog box. Select **Serial**, then click **Manage Tokens**.
  - Choose **Options** from the Tools menu to display the Options dialog box. Click the **Realtime** tab, then click **Manage Tokens**.

The Manage Tokens dialog box is displayed. The number of tokens currently on your computer is shown in the *Realtime tokens on this computer* text box at the top of the dialog box.

4. Click the **Download Tokens** tab (Figure 4-1).

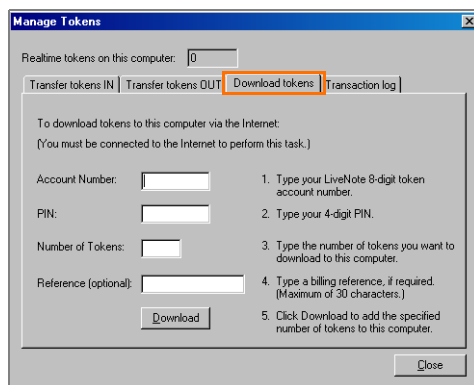


Figure 4-1. Manage Tokens dialog box–Download Tokens tab

5. Type your firm's token account number in the *Account Number* text box.
6. Type your PIN in the *PIN* text box.
7. Type the number of tokens you want to download in the *Number of Tokens* text box.
8. If required, type a billing reference in the *Reference* text box. This is for your firm's use only and can be up to 30 characters in length.
9. Click **Download**. The tokens are downloaded to your computer.
10. A message confirming that the download was successful is displayed. Click **OK**.
11. Click **Close** to close the Manage Tokens dialog box.

### Transferring Tokens from Your Computer to Another User

You can transfer tokens from your computer to another West Case Notebook or West LiveNote user's computer. To transfer tokens from your computer, 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. To manage tokens, do one of the following:
  - Click the **New** arrow on the Main Menu toolbar, then choose **Realtime Transcript** from the menu to display the Connect to Realtime dialog box. Select **Serial**, then click **Manage Tokens**.
  - Choose **Options** from the Tools menu to display the Options dialog box. Click the **Realtime** tab, then click **Manage Tokens**.

The Manage Tokens dialog box is displayed. The number of tokens currently on your computer is shown in the *Realtime tokens on this computer* text box at the top of the dialog box.

4. Click the **Transfer Tokens Out** tab (Figure 4-2).

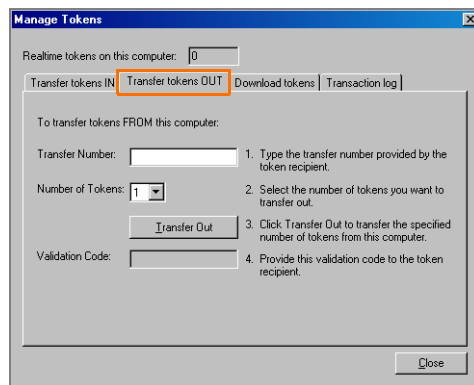


Figure 4-2. Manage Tokens dialog box–Transfer Tokens Out tab

5. Type the nine-digit transfer number given to you by the token recipient in the *Transfer Number* text box. This number is shown on the recipient's computer in the *Transfer Number* text box on the Transfer Tokens In tab.

6. Choose the number of tokens you want to transfer to the recipient from the *Number of Tokens* drop-down list. This number must match the number of tokens shown on the recipient's computer in the *Number of Tokens* box on the Transfer Tokens In tab.
7. Click **Transfer Out**.
8. A message confirming the transfer was successful is displayed. Click **OK**.
9. A validation code is generated and displayed in the *Validation Code* text box. Give this validation code to the token recipient.
 

**Note** To receive the tokens, the recipient needs to type the validation code in the *Validation Code* text box on the Transfer Tokens In tab on his or her computer.
10. Once the recipient has received the tokens on his or her computer, click **Close** to close the Manage Tokens dialog box.

**Note** Do not close the Manage Tokens dialog box until the token recipient has received the tokens on his or her computer.

### Transferring Tokens to Your Computer

You can transfer tokens to your computer from a court reporter, another West Case Notebook or West LiveNote user, or LiveNote. To transfer tokens to your computer, 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. To manage tokens, do one of the following:
  - Click the **New** arrow on the Main Menu toolbar, then choose **Realtime Transcript** from the menu to display the Connect to Realtime dialog box. Select **Serial**, then click **Manage Tokens**.
  - Choose **Options** from the Tools menu to display the Options dialog box. Click the **Realtime** tab, then click **Manage Tokens**.

The Manage Tokens dialog box is displayed. The number of tokens currently on your computer is shown in the *Realtime tokens on this computer* text box at the top of the dialog box.

4. Click the **Transfer Tokens In** tab (Figure 4-3).

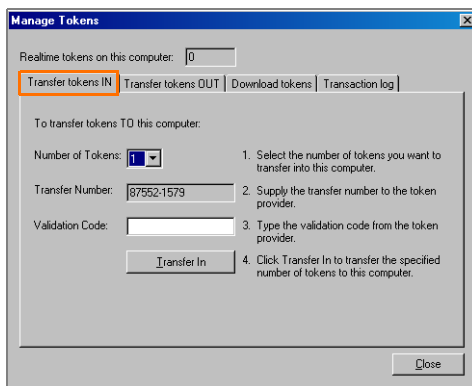


Figure 4-3. Manage Tokens dialog box–Transfer Tokens In tab

5. Choose the number of tokens that you are transferring to your computer from the *Number of Tokens* drop-down list. This number must match the number of tokens shown in the *Number of Tokens* box on the Transfer Tokens Out tab on the token provider's computer. A transfer number is generated and displayed in the *Transfer Number* text box.

6. Give the transfer number to your token provider. The token provider uses this number to generate a validation code that he or she will give to you for the token transfer.
7. Type the validation code the token provider gives you in the *Validation Code* text box.
8. Click **Transfer In**.
9. If the validation code is correct, the tokens are transferred to your computer and a message confirming that the transfer was successful is displayed. Click **OK**.
10. Click **Close** to close the Manage Tokens dialog box.

## Viewing the Token Transaction Log

You can view a list of the token transactions that have occurred on your computer. To view the token transaction log, complete these steps:

1. From the Tools menu in West Case Notebook or West LiveNote, choose **Options** to display the Options dialog box.
2. Click the **Realtime** tab, then click **Manage Tokens**. The Manage Tokens dialog box is displayed. The number of tokens currently on your computer is shown in the *Realtime tokens on this computer* text box at the top of the dialog box.
3. Click the **Transaction Log** tab (Figure 4-4).

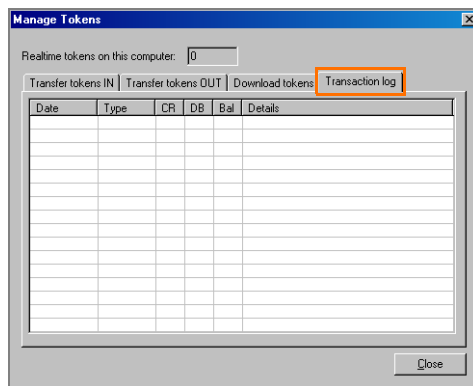


Figure 4-4. Manage Tokens dialog box–Transaction Log tab

The transaction log contains the following information:

- **Date**—the date on which the transaction was completed
- **Type**—the type of transaction
  - **Download**—tokens downloaded from your firm’s LiveNote Central account
  - **Use**—a token was used
  - **In**—tokens transferred to your computer
  - **Out**—tokens transferred from your computer
  - **Judicial**—judicial tokens, available to state and federal judges
  - **Adjust**—tokens were found on your computer and added to the transaction log, but transaction details are no longer available, e.g., you uninstalled and reinstalled West Case Notebook or West LiveNote
- **CR**—the number of tokens that were added to your computer by the transaction
- **DB**—the number of tokens that were transferred from your computer by the transaction
- **Bal**—the number of tokens on your computer after the transaction was completed

- **Details**—details of the transaction
  - **A/C**—the account number
  - **TN**—the transfer number
  - **VC**—the validation code used
  - **Consumed a token**—indicates a token was used
  - **Judicial balance**—the number of judicial tokens on the computer
  - whether tokens were found on your computer and added to the transaction log
  - the billing reference, if any

## 5 USB to Serial Adapters

Newer laptops often do not contain serial (9-pin) ports. Below is a list of USB to serial adapters you can use to connect to a Realtime session through the USB port. The adapters are listed from most recommended to least recommended. You can purchase most of these adapters at computer or electronics stores or on the Web from the manufacturers or computer retailers.

Manufacturer	Image	Compatibility and Notes
IOGear <a href="http://www.iogear.com">www.iogear.com</a> Part #GUC232A		compatible with Windows 98SE, ME, 2000, and XP; Windows Vista; and Windows 7 (XP driver supports Windows Vista)
Sewell <a href="http://www.sewelldirect.com">www.sewelldirect.com</a> Part SW-1301		compatible with Windows 98SE, ME, 2000, and XP; Windows Vista; and Windows 7 (with latest driver download)
Aten <a href="http://www.aten.com">www.aten.com</a> Part #UC232A		compatible with Windows 98, ME, 2000, 2003, and XP and Windows Vista
Targus <a href="http://www.targus.com">www.targus.com</a> Part #PA088UZ		compatible with Windows 98, ME, 2000, and XP and Windows Vista
Hawking <a href="http://www.hawkingtech.com">www.hawkingtech.com</a> HUC232S		compatible with Windows 98SE, ME, and 2000
Belkin <a href="http://www.belkin.com">www.belkin.com</a> Part #F5U409V1		compatible with Windows 98, 98SE, ME, 2000, and XP

Manufacturer	Image	Compatibility and Notes
Belkin <a href="http://www.belkin.com">www.belkin.com</a> Part #F5U103		compatible with Windows 95, 98, ME, 2000, and XP <b>no longer manufactured</b>
Belkin <a href="http://www.belkin.com">www.belkin.com</a> Part #F5U109		compatible with Windows 98, 98SE, ME, 2000, and XP <b>no longer manufactured</b>
Dynex <a href="http://www.bestbuy.com">www.bestbuy.com</a> Part #DX-UBDB9		compatible with Windows 98, ME, 2000, and XP <b>not recommended for use with West Case Notebook or West LiveNote</b>
Keyspan <a href="http://www.keyspan.com">www.keyspan.com</a> Part #USA-19HS		compatible with Windows 98, ME, 2000, and XP; Windows Vista; and Windows 7 <b>not recommended for use with West Case Notebook or West LiveNote</b>
Radio Shack <a href="http://www.radioshack.com">www.radioshack.com</a> Part #26-183		compatible with Windows 98, 98SE, ME, 2000, and XP <b>no longer manufactured</b> <b>not recommended for use with West Case Notebook or West LiveNote</b>





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