

LiveNote Stream Manager: Getting Started Guide

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For assistance using LiveNote Stream Manager, call 1-800-290-9378 or e-mail west.livenote@thomson.com.

For free reference materials, visit store.westlaw.com/support/user-guide/livenote-case-notebook.aspx.

Introduction

This guide provides an overview of LiveNote™ Stream Manager™ and describes how to install the software and set up a LiveNote Stream Manager session.

HARDWARE REQUIREMENTS

The following hardware is recommended for LiveNote Stream Manager:

- Personal computer with a Pentium processor running at a minimum 800 MHz (1 GHz recommended)
- 64 MB of RAM (1 GB minimum recommended)
- 250 MB of available hard disk space (60 GB recommended)
- Screen resolution: 800 x 600 (1024 x 768 recommended)
- Screen colors: 256 (16-bit recommended)

OVERVIEW OF LIVENOTE STREAM MANAGER

LiveNote Stream Manager enables you to transmit deposition transcripts live over the Internet. Transmitting a live transcript is referred to as streaming. LiveNote Stream Manager streams transcripts to West Case Notebook and West LiveNote.

West Case Notebook or West LiveNote can be installed on a computer at the deposition, or off site, or both. You can have a participant viewing the streamed transcript via West Case Notebook or West LiveNote, and another participant off site viewing the streamed testimony via the Internet.

Note You can install LiveNote Stream Manager on the same computer as the CAT system, but you must start and configure LiveNote Stream Manager before you start the CAT system.

PREREQUISITES FOR USING LIVENOTE STREAM MANAGER

Before installing Stream Manager, you must

- have a LiveNote Central account; if you do not have an account, you can send an e-mail to support@livenote.com to request one.
- schedule a session for Stream Manager.

Scheduling a LiveNote Stream Manager Session

You can schedule LiveNote Stream session at either the [LiveNote Stream](#) website or the [LiveNote Central](#) website. If you schedule a session at the LiveNote Stream website, you must submit your request 24 hours in advance to view transcript text or 72 hours in advance to view video and text. If you schedule a session at LiveNote Central, it automatically has a Pending status and may be available in less than 24 hours.

SCHEDULING A SESSION AT THE LIVENOTE STREAM WEBSITE

To schedule a LiveNote Stream session at the LiveNote Stream website, complete these steps:

1. Go to stream.livenote.com. The LiveNote Stream home page is displayed (Figure 1).

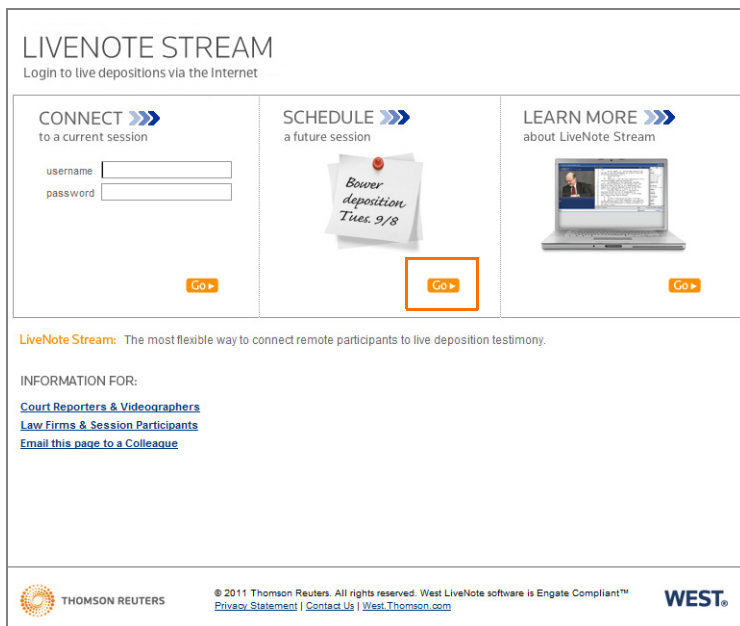


Figure 1. LiveNote Stream home page

2. In the Schedule a Future Session section, click **Go**. The Schedule Transcript Stream Event page is displayed.
3. Complete the form as appropriate, considering the following information:
 - **Video streaming:** If you intend to stream live video from the deposition, you must click **Yes** next to Video Streaming? under Event Details.
 - **Email addresses and video:** You must type an email address for each person attending the deposition. If you do not enter an email address, that person will not have access to the session. Additionally, if live video is part of the session, you must select the **Video** check box for each person who wants to view the video.

- **Instant messaging group:** When you assign individuals to instant messaging groups, it is recommended that you assign opposing parties to different groups.

4. Click **Submit**. The form is submitted to LiveNote.

SCHEDULING A SESSION AT LIVENOTE CENTRAL

To schedule a LiveNote Stream session at LiveNote Central, complete these steps:

1. Go to www.livenotecentral.com. The Login page is displayed (Figure 2).

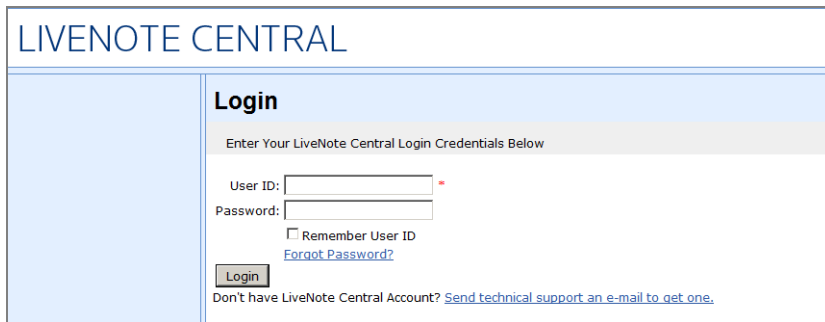


Figure 2. Login page

2. Type your user ID and password in the appropriate boxes and click **Login**. The Welcome page is displayed.
3. Click **Stream Sessions** in the left pane, then click **New Session**. The New Session page is displayed (Figure 3).

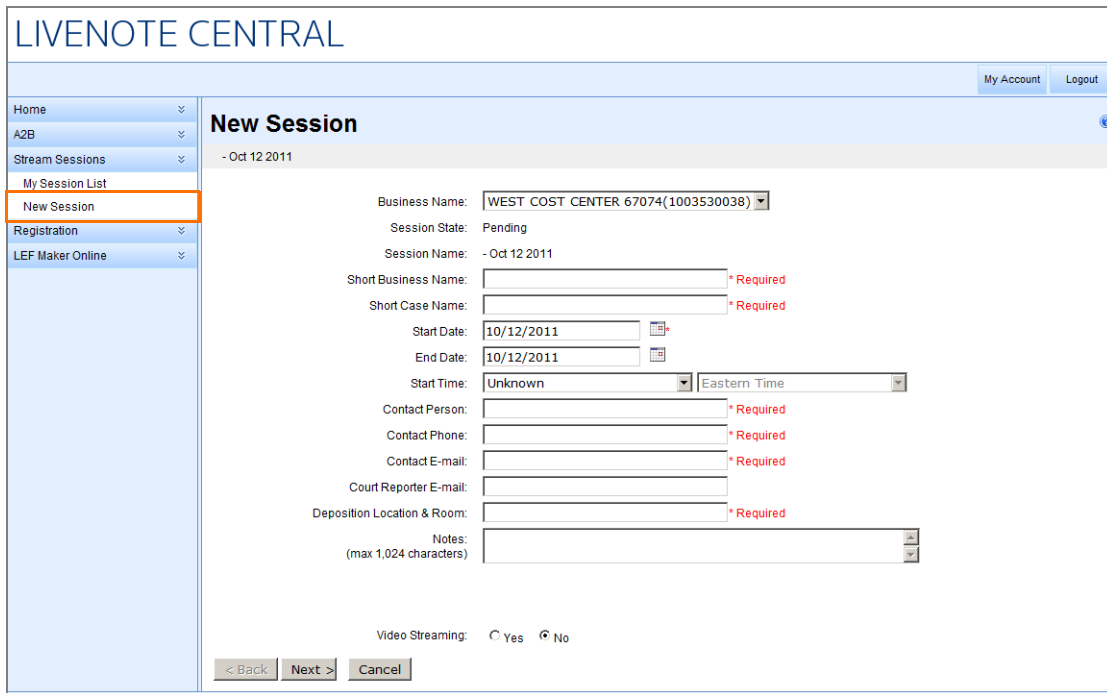


Figure 3. New Session page

4. Type your information in the appropriate text boxes.
5. Click **Yes** next to Video Streaming, if desired.

6. Click **Next**. If you clicked **Yes** next to Video Streaming on the previous page, at this page you must specify if you are renting video equipment and, if you are renting, the address to which the equipment must be sent. If you are not renting video equipment, you must provide information on your own equipment. Click **Next**. The New Session–Add Groups page is displayed (Figure 4).

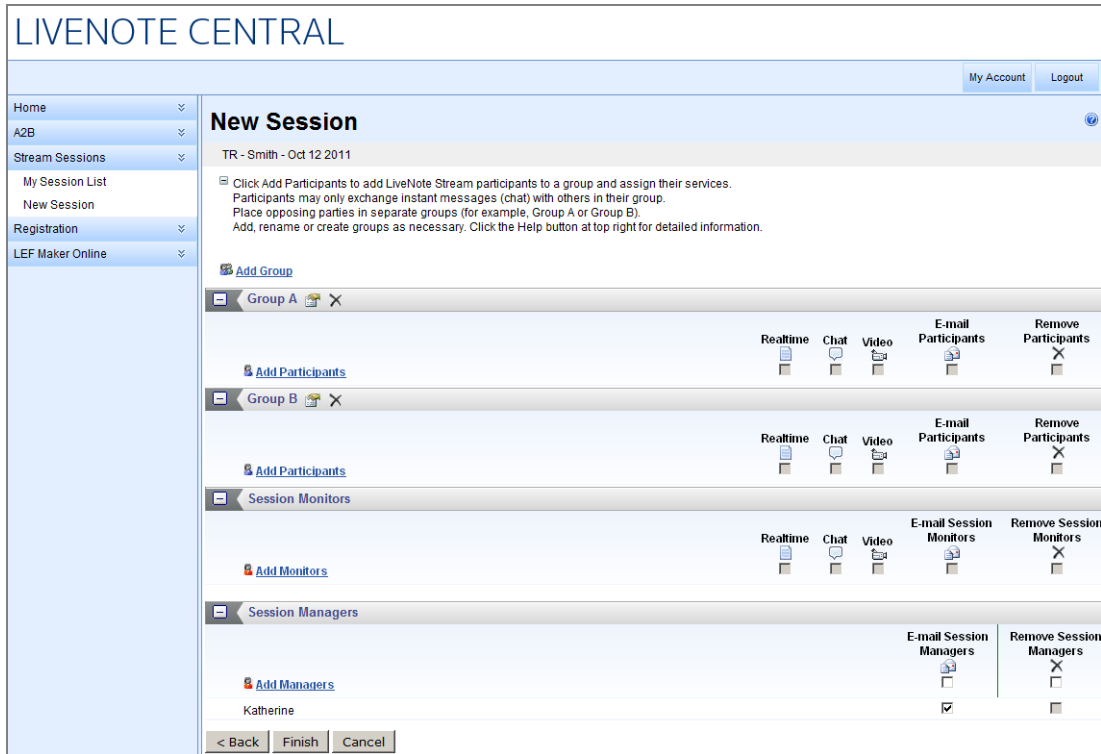


Figure 4. New Session–Add Groups page

7. Under the first group to which you want to add participants, click **Add Participants**. The Add Participants dialog box is displayed (Figure 5).

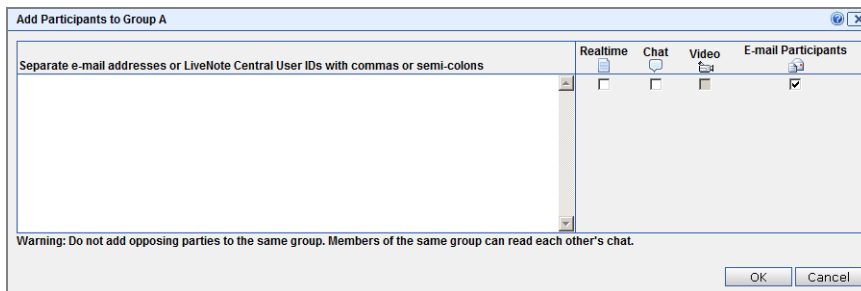


Figure 5. Add Participants dialog box

8. Type the email address or LiveNote Central user ID for each participant, separated with a comma or semi-colon, in the box.
9. Select the check boxes next to Realtime, Chat, and Video, if available, for the services you want the participants to access.
10. Click **OK**. The participants are listed under the group.

11. Repeat steps 7–10 to add participants to other groups.

Important You must add the court reporter to the Session Managers group.

Notes

- LiveNote Support representatives are not automatically added to the session.
- LiveNote Support is not notified if you add participants to the session after you complete setting up the session. Additionally, if you add participants, the session reverts to Pending status. Therefore, it is recommended that you notify LiveNote Support if you must add participants at the last minute, especially if the session is already in progress. After you add participants, their names are not visible in Stream Manager if you have already started the session, but they are able to participate and their names are included in the report.
- You can schedule a session with Open status, which allows you to schedule with no lead time and to add participants at the last minute. For further information on scheduling an Open status session, email training@livenote.com.

Installing LiveNote Stream Manager

Note If you install LiveNote Stream Manager on the same computer where it was installed previously, your license code is displayed automatically. If you install LiveNote Stream Manager on a different computer, you need to obtain your existing license code. To access your license code, complete these steps:

1. On the computer where LiveNote Stream Manager was installed previously, open LiveNote Stream Manager and log on to an existing session.
2. Click **Help**, then click **About LiveNote Stream Manager**. The About LiveNote Stream Manager dialog box is displayed.
3. Write down the license code for future reference.
4. When you are installing the new version of LiveNote Stream Manager on the other computer, type the license code in the User Information dialog box (step 5 below).

To obtain a license code, you can send an email to operations@livenote.com or call Customer Technical Support at 1-800-290-9378.

To install LiveNote Stream Manager, complete these steps:


1. Go to westapps.west.thomson.com/software/stream-manager-cr/default.asp. The LiveNote Stream Manager registration page is displayed.
2. Complete the registration form and click **Proceed with Download** at the bottom of the page.
3. At the next page, click **Proceed with Download**. The Welcome to the LiveNote Stream Manager Installation Wizard dialog box is displayed.

Note If a message asking you to uninstall LiveNote Stream Manager manually is displayed, you must uninstall the software and restart your computer before installing the latest version of LiveNote Stream Manager.

4. Click **Next**. The License Agreement dialog box is displayed.
5. Click **I accept the license agreement**, then click **Next**. The Readme Information dialog box is displayed.
6. After reading the information in the Readme Information dialog box, click **Next**. The User Information dialog box is displayed.
7. Type your name, organization, and license code in the appropriate boxes. Click either **Anyone who uses this computer** or **Only for me**.

Note If you are installing LiveNote Stream Manager on a computer where it was installed previously, the License Code is automatically displayed. If you are installing LiveNote Stream Manager on a different computer, use your existing license code.

8. Click **Next**. The Destination Folder dialog box is displayed.
9. Click **Next**. The Ready to Install the Application dialog box is displayed.
10. Click **Next** to begin the installation. A dialog box indicating that LiveNote Stream Manager was successfully installed is displayed when the installation is complete.
11. Click **Finish**.

To access LiveNote Stream Manager, double-click the **LiveNote Stream Manager** icon  that was installed on your desktop.

Configuring LiveNote Stream Manager

After you access LiveNote Stream Manager, you must configure it to be compatible with your CAT system.

Notes

- **Virtual port:** For LiveNote Stream Manager and the CAT system to communicate via virtual ports, you must access LiveNote Stream Manager and set the options below before starting the CAT system software.
- **Make a note of the port:** When you select a port in the procedure below, write down the name of the port. Then, after you configure LiveNote Stream Manager, you enter the same port in the CAT system.

To configure LiveNote Stream Manager, complete these steps:

1. Access LiveNote Stream Manager. The Connect to LiveNote Global Server dialog box is displayed.
2. Type your username and password in the appropriate boxes.
3. Click **Next**. The Select Session dialog box is displayed.
4. Click the session you want to join and click **Next**. The Realtime Options dialog box is displayed (Figure 6).

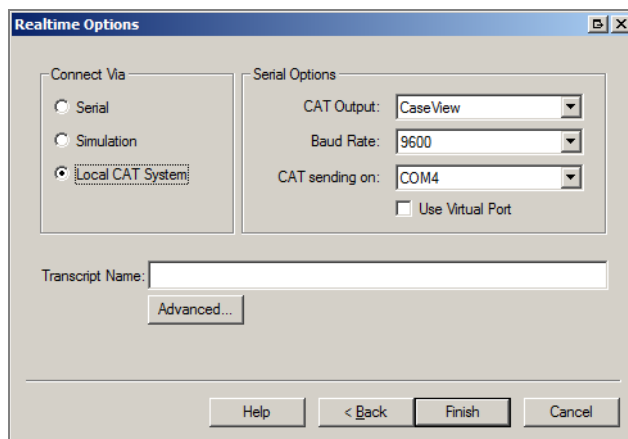


Figure 6. Realtime Options dialog box

5. Set the following options:
 - **Serial:** Click this option if the CAT system is on one computer, LiveNote Stream Manager is on a different computer, and you are connecting these computers with a serial connection.
 - **Simulation:** Click this option to view the simulation feed.

- **Local CAT System:** Click this option if the CAT system and LiveNote Stream Manager are on the same computer. Note that when you click this option, the Use Virtual Port check box is displayed. As mentioned previously, you must configure this setting before you start the CAT system and before you define the output port for the CAT software.
 - **Use Virtual Port:** Select this check box if the CAT system and LiveNote Stream Manager are installed on the same computer and you are not using a serial connection at the deposition, e.g., you are not connected to a computer with West Case Notebook or West LiveNote via a serial port. In some cases, even if the West Case Notebook or West LiveNote computer is in the same room, you may find it easier to connect via LiveNote Stream™ instead of using a serial connection. As mentioned previously, you must configure this setting before you start the CAT system and before you define the output port for the CAT software.
 - **CAT Output:** If you use CaseView, click **CaseView** in the list. If you use an output type other than CaseView, click **ASCII Wrap**.
 - **Baud Rate:** The most common baud rate is 2400. Refer to the CAT system's operating instructions for the appropriate setting.
 - **Serial Port or CAT Sending On:**
 - If you clicked **Serial**, Serial Port is displayed; click the serial port sending information to the CAT system.
 - If you clicked **Local CAT System**, CAT Sending On and the Use Virtual Port check box are displayed. Select the **Use Virtual Port** check box if West Case Notebook or West LiveNote is not on a computer in the same room receiving the stream, e.g., if you are streaming to West Case Notebook or West LiveNote off site. Whichever port you click, make a note of the number. You will need to enter the number when setting up the CAT system. If you select the **Use Virtual Port** check box, then the number is gray, but you will still need to enter the number in the CAT system as the output port.
 - **Transcript Name:** Type the name for the transcript.
6. Click **Advanced**. The Advanced Options dialog box is displayed (Figure 7).

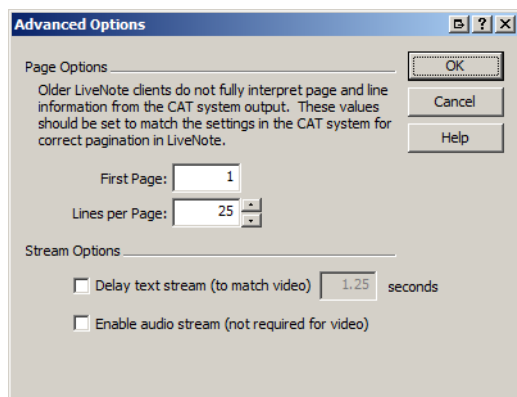


Figure 7. Advanced Options dialog box

Set the following options:

- **First Page:** Type the number of the first page of the transcript.
- **Lines Per Page:** Type the number of lines per page in the transcript or click the arrows to set the page number.

- **Delay text stream (to match video):** Select this check box if you have streaming video with the transcript and you want to slow down the text stream to keep it in sync with the video stream. You may need to experiment with this feature. For example, before the deposition begins, set the buffer at three seconds, ask a receiver of the stream to watch the stream, turn on the video, have someone speak, and type what the person is saying. Ask the receiver of the stream if the text is in sync with the person speaking. You can adjust the buffer up to 10 seconds. You can return at any time and adjust this option.
 - **Enable audio stream (not required for video):** Select this check box if you have streaming audio but not video for the deposition. It is not necessary to select this check box when you have streaming video. Video includes the audio automatically.
7. Click **OK** in the Advanced Options dialog box.
 8. Click **Finish** in the Realtime Options dialog box.

DEFINING THE OUTPUT PORT IN THE CAT SYSTEM

When setting up the CAT system

- set the baud rate to match the setting in LiveNote Stream Manager
- set the output port to match the port in LiveNote Stream Manager

Connection Scenarios

Below are connection scenarios for connecting to LiveNote Stream Manager when the CAT software and LiveNote Stream Manager are installed on the same computer.

SCENARIO 1: TESTING WITH THE LIVENOTE STREAM MANAGER SIMULATION FILE

To test LiveNote Stream Manager with a simulation file, complete these steps:

1. Access Stream Manager. The Connect to LiveNote Global Server dialog box is displayed.
2. Type your username and password in the appropriate boxes.
3. Click **Next**. The Select Session dialog box is displayed.
4. Click the session you want to join and click **Next**. (If you have not set up a session, see "Scheduling a LiveNote Stream Manager Session" on page 2.) The Realtime Options dialog box is displayed.
5. Click **Simulation**.
6. Type a name for the transcript in the Transcript Name box.
7. Click **Finish**. The streaming text is displayed.

SCENARIO 2: MULTIPLE TYPES OF CONNECTIONS

In the scenario below, Attorney A is on site at the deposition, using West Case Notebook or West LiveNote, and wants to connect to the session using a serial connection. Attorney B is on site at the same deposition, using West Case Notebook or West LiveNote, and wants to connect to the session via LiveNote Stream. LiveNote Stream Manager and the CAT software are installed on the same computer.

Important You must configure the port settings for LiveNote Stream Manager before you start the CAT software.

To establish the connections, complete these steps:

1. Access Stream Manager. The Connect to LiveNote Global Server dialog box is displayed.
2. Type your username and password in the appropriate boxes.
3. Click **Next**. The Select Session dialog box is displayed.
4. Click the session you want to join and click **Next**. (If you have not set up a session, see "Scheduling a LiveNote Stream Manager Session" on page 2.) The Realtime Options dialog box is displayed.

5. Click **Local CAT System**.
6. Clear the **Virtual Port** check box, if necessary.
7. Click a serial port in the **CAT sending on** list. Make a note of the serial port you select. The CAT software output serial port must match the CAT sending port.
8. Type a name for the transcript in the Transcript Name box.
9. Click **Finish**.
10. Connect the computer where the CAT software is installed to Attorney A's computer using serial cables and adaptors.
11. Instruct Attorney A to complete these steps:
 - Access West Case Notebook or West LiveNote.
 - Click the **New** arrow, then click **Realtime Transcript** on the menu to display the Connect to Realtime dialog box.
 - Click **Serial**.
 - Click **Connect**.
12. Instruct Attorney B to complete these steps:
 - Access West Case Notebook or West LiveNote.
 - Click the **New** arrow, then click **Realtime Transcript** on the menu to display the Connect to Realtime dialog box.
 - Click **LiveNote Stream**.
 - Click **Connect**.

Notes

- When you start the session, Attorney A receives the transcript in West Case Notebook or West LiveNote via the serial connection, and Attorney B receives the transcript in West Case Notebook or West LiveNote via LiveNote Stream.
- If you invited participants who do not have West Case Notebook or West LiveNote, they can go to stream.livenote.com and log on to the specified session to view the streaming transcript. They cannot save the transcript or copy and paste text, but they can print the transcript.
- If you invited off-site participants who use West Case Notebook or West LiveNote, they can connect to the session via West Case Notebook or West LiveNote by clicking **LiveNote Stream** in the Connect to Realtime dialog box.

SCENARIO 3: SENDING A TRANSCRIPT VIA LIVENOTE STREAM

In this scenario, the CAT software and LiveNote Stream Manager are installed on the same computer and you are sending a transcript solely via LiveNote Stream.

To send a transcript via LiveNote Stream, complete these steps:

1. Access Stream Manager. The Connect to LiveNote Global Server dialog box is displayed.
2. Type your username and password in the appropriate boxes.
3. Click **Next**. The Select Session dialog box is displayed.
4. Click the session you want to join and click **Next**. (If you have not set up a session, see "Scheduling a LiveNote Stream Manager Session" on page 2.) The Realtime Options dialog box is displayed.
5. Click **Local CAT System**.
6. Select the **Virtual Port** check box.


7. Type a name for the transcript in the Transcript Name box.
8. Click **Finish**.

Notes

- Participants using West Case Notebook or West LiveNote can connect to the transcript stream by clicking **LiveNote Stream** in the Connect to Realtime dialog box. Since the stream is streaming through the Internet, they can connect to the session if they are either on site or off site.
- If participants do not have West Case Notebook or West LiveNote, they can go to stream.livenote.com, log in to the specified session, and view the streaming transcript. They cannot save the transcript or copy and paste text, but they can print the transcript.

Slowing the Text Stream

After the session begins, if the text is streaming faster than the video is streaming, you can slow down the text. To slow down the text stream, complete these steps:

1. Click **Configuration**  on the toolbar. The Local Cat System Options dialog box is displayed (Figure 8).

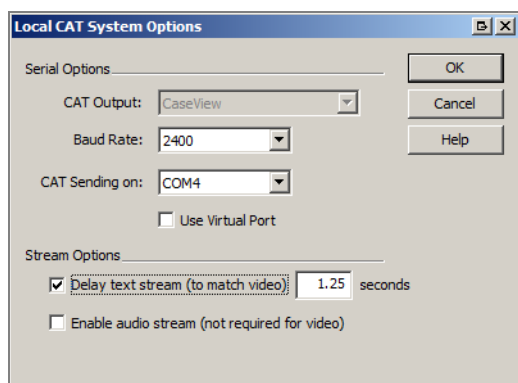


Figure 8. Local Cat System Options dialog box

2. Under Stream Options, select the **Delay text stream (to match video)** check box, then type the number of seconds by which you want to slow down the text stream.
3. Click **OK**.