

Connecting to a Real-Time Session

Quick Guide for LiveNote™ Version 10

August 2008

Connecting to a Real-Time Session

LiveNote™ Version 10

August 2008

West Customer Service

LiveNote Technical Assistance (available 24 hours a day)

If you have general or technical questions about LiveNote, call LiveNote Customer Technical Support at 1-800-290-9378 or send an e-mail message to west.livenote@thomson.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.

Reference Materials

To browse and order free LiveNote reference materials, visit west.thomson.com/westlaw/guides/LiveNote.aspx. LiveNote also contains valuable online Help.

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Introduction

This guide provides the information needed to connect to a real-time session through LiveNote. The guide covers using a serial connection, LiveNote Stream, Serial Writer, and tokens and includes a list of available USB to serial adapters.

Notification Requirements

If you are using LiveNote Stream to connect to a real-time session, the court reporter must notify LiveNote *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 2.

West Court Reporting Services

To get the most out of your real-time sessions, you can use West Court Reporting Services. West Court Reporting Services assigns a dedicated project manager to your case. The project manager can

- schedule the deposition
- anticipate technology needs
- provide LiveNote training that is approved for continuing legal education (CLE) credit
- provide a LiveNote certified court reporter
- provide postproduction management of the deposition

To contact West Court Reporting Services, call 1-800-548-3668, then choose option 1. You can also go to www.westcourtreporting.com.

Finding a Certified Court Reporter

Many court reporters are certified in LiveNote. To locate a certified court reporter in your area, go to www.livenote.com/CLSPDetails.asp.

Connecting to a Real-Time Session

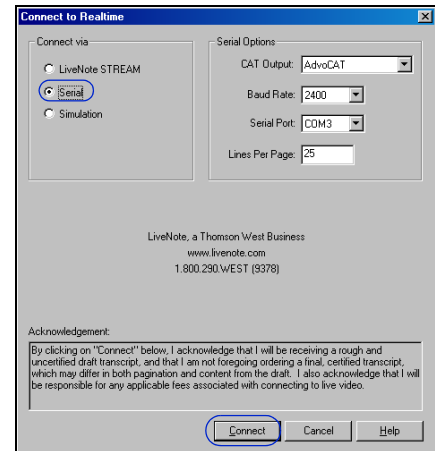
Connecting with a Serial Connection

If you want to connect to a real-time session 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 11.) If a USB to serial adapter is not available, you can connect to the real-time session 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 real-time session. See “Using Serial Writer” on page 5 for information on this feature.

To view the real-time LiveNote session once all the cables are in place, complete these steps:

1. Access LiveNote.
2. When the Open Case dialog box is displayed, select a case and click **OK**.
3. Click the **New Transcript** button on the toolbar at the bottom of the LiveNote window. In the alternative, choose **New** from the Transcript menu. The New Transcript Properties dialog box is displayed.
4. Type the name of the deponent in the *Name* text box and click **OK**.
5. Click the **Connect** button on the toolbar at the bottom of the LiveNote window to display the Connect to Realtime dialog box.
6. Under *Connect via*, select **Serial**. The court reporter will give you all the necessary Serial Options settings.
7. Click **Connect** to connect to the real-time session.



Using LiveNote Stream

LiveNote Stream allows you to connect to a real-time session via the Internet. You can access LiveNote Stream through LiveNote software or through Microsoft Internet Explorer.

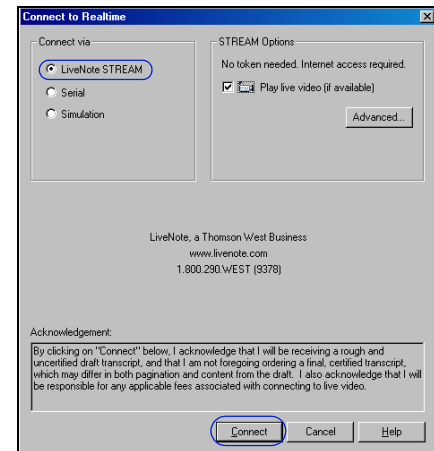
The court reporter must notify LiveNote *24 hours in advance* if you want to use LiveNote Stream to view transcript text or *72 hours in advance* to view video and text. LiveNote will send you an e-mail with the required username and password.

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 LiveNote

To connect to a real-time session using LiveNote Stream through LiveNote, complete these steps:

1. Follow steps 1 through 5 on page 2.
2. Under *Connect via*, select **LiveNote Stream**.
3. If video is available and you want to view it, select the **Play live video** check box.
4. Click **Connect** to display the LiveNote Stream Login dialog box.
5. Type the username and password sent to you by LiveNote and click **OK** to display the Connect to LiveNote Stream dialog box.
6. Select the session you want to attend and click **OK**. The real-time deposition transcript text and video are displayed.



Sending an Instant Message

To send an instant message, complete these steps:

1. Click the **New Message** button on the toolbar at the bottom of the LiveNote window to display the LiveNote Message dialog box.
2. Type the message you want to send.
3. Select one or more recipients from the recipient drop-down list.

Note: Users are added to a secure message group when the LiveNote Stream session is arranged.

4. Click the **Send** icon ().

Important: Only LiveNote software users can send private messages to other users in the group. Messages sent by participants using LiveNote Stream through the Internet are seen by all others in the group. Moreover, when a participant using LiveNote Stream through the Internet replies to a LiveNote software user, the original message and the reply message are visible to all participants in the group.

Accessing LiveNote Stream Through Internet Explorer

You do not need 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.
2. Type the username and password sent to you by LiveNote and click **Go** to display a list of your sessions.
3. Select the session you want to attend and click **Go**. The real-time session transcript text and video are displayed.



Access to Features in LiveNote Stream

When you view a real-time 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 real-time session using LiveNote software, you have access to all the tools in LiveNote. Below is a chart showing the features available with LiveNote Stream.

LiveNote Features	LiveNote Stream Through Internet Explorer	LiveNote Stream Through LiveNote
Audio	■	■
Video	■	■
Instant messaging	■	■
Streaming transcript text	■	■
Start and stop text	■	■
Word Wheel	■	■
Saved transcript		■
Quick Marks		■
Issue Marks		■
Annotations		■
Auto Tags		■
Full Text Query		■
Reports		■

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 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 LiveNote computer to receive the test transcript, access Serial Writer on the test computer, and run the Serial Writer utility.

Preparing the LiveNote Computer

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

Creating a Test Transcript

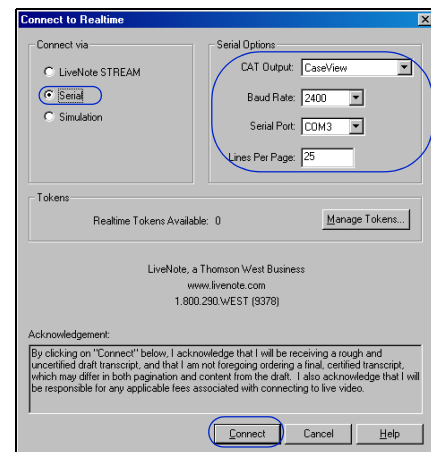
To create a test transcript, complete these steps:

1. Access LiveNote.
2. When the Open Case dialog box is displayed, select a case and click OK.
3. Click the **New Transcript** button on the toolbar at the bottom of the LiveNote window. In the alternative, choose **New** from the Transcript menu. The New Transcript Properties dialog box is displayed.
4. Type **Test** in the *Name* text box and click **OK**. A new, blank transcript is displayed.

Configuring the Computer Options

To configure the computer options, complete these steps:

1. Click the **Connect** button on the toolbar at the bottom of the LiveNote window to display the Connect to Realtime dialog box.
2. Under *Connect via*, select **Serial**.
3. Under *Serial Options*, the CAT output and baud rate must match those of the test computer.
 - From the *CAT Output* drop-down list, select **CaseView**.
 - From the *Baud Rate* drop-down list, select **2400**.
 - From the *Serial Port* drop-down list, select the port for the incoming connecting cable. This does not need to match the test computer's port.
4. Click **Connect** to receive the test transcript.



Note: If you use Tokens, you can test your serial connection free of charge. From the Options menu, choose **Realtime Options**, then choose **Test Serial Connection**. The Test Serial Connection dialog box is displayed. Follow steps 3 and 4 above to configure your computer to receive the test transcript.

Accessing Serial Writer

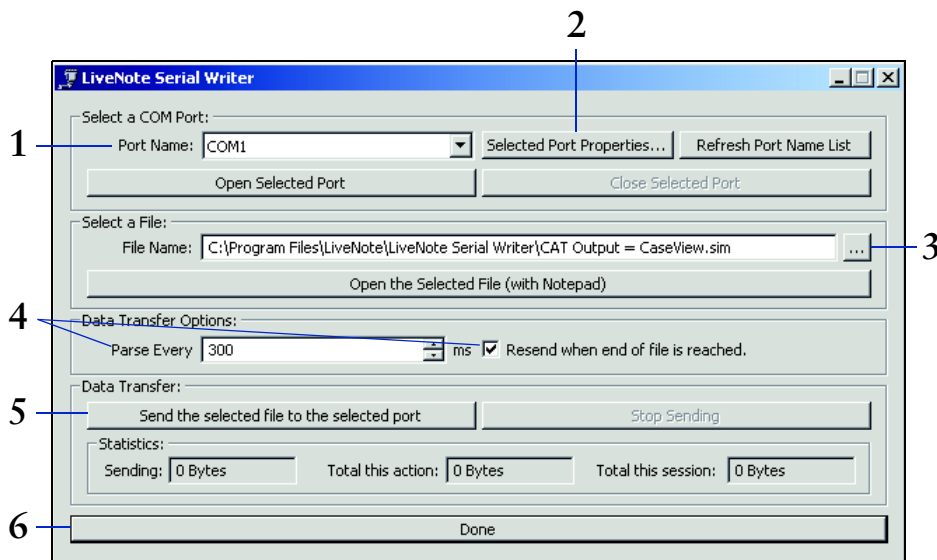
Serial Writer must be installed on the test computer to access it. To install Serial Writer, go to www.livenote.com/downloads/SW-1.5.0.17121.msi to display the LiveNote Serial Writer Setup Wizard. Follow the instructions to download Serial Writer.

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.

Testing the Serial Connection

To test the serial connection, complete these steps:

1. From the *Port Name* drop-down list, select the port for the outgoing connecting cable. This does not need to match the port for the LiveNote computer.
2. Click **Selected Port Properties** to display the Port Properties dialog box. From the *Baud Rate* drop-down list, select **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 LiveNote computer. The data transfer ceases when the end of the file has been reached unless the **Resend when end of file is reached** check box is selected.
6. Click **Done** to stop the test.



Using Tokens

Managing Tokens

You can use an electronic token to connect to a real-time deposition with a serial connection. This ensures that 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 LiveNote user
- transfer tokens to your computer from another LiveNote user, a court reporter, or LiveNote by calling 1-800-LIVENOTE (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 real-time sessions. Also, tokens are purchased and invoiced through LiveNote.

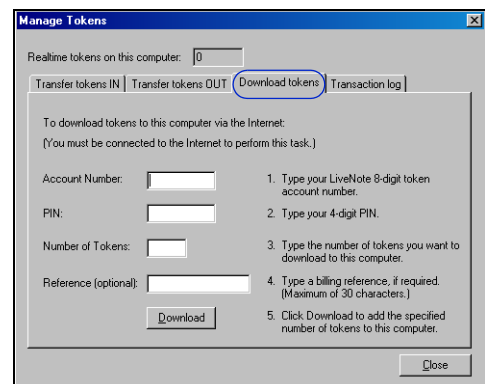
Downloading Tokens to Your Computer

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 LiveNote.
2. When the Open Case dialog box is displayed, select a case and click **OK**.
3. Click the **Connect** button on the toolbar at the bottom of the LiveNote window to display the Connect to Realtime dialog box, then select **Serial** and click **Manage Tokens**. In the alternative, from the Options menu, choose **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.
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.

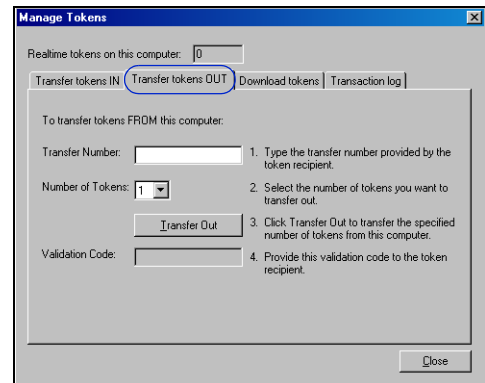
Transferring Tokens from Your Computer to Another User

You can transfer tokens from your computer to another LiveNote user's computer. To transfer tokens from your computer, complete these steps:

1. Access LiveNote.
2. When the Open Case dialog box is displayed, select a case and click **OK**.
3. Click the **Connect** button on the toolbar at the bottom of the LiveNote window to display the Connect to Realtime dialog box, then select **Serial** and click **Manage Tokens**. In the alternative, from the Options menu, choose **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.
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. Select 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: In order for the recipient 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.

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

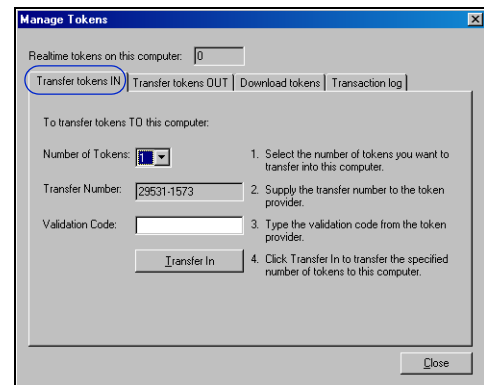
Transferring Tokens to Your Computer

You can transfer tokens to your computer from a court reporter, another LiveNote user, or LiveNote. To transfer tokens to your computer, complete these steps:

1. Access LiveNote.
2. When the Open Case dialog box is displayed, select a case and click **OK**.
3. Click the **Connect** button on the toolbar at the bottom of the LiveNote window to display the Connect to Realtime dialog box, then select **Serial** and click **Manage Tokens**. In the alternative, from the Options menu, choose **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.
5. Select 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 is 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.



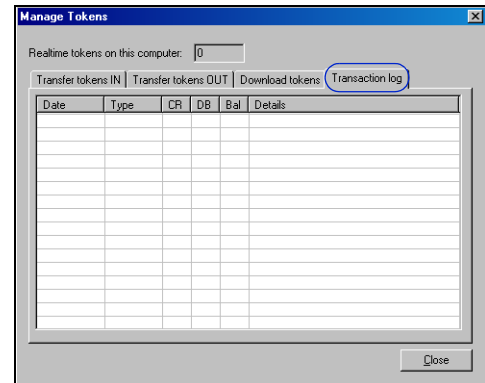
Viewing the Token Transaction Log

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 Options menu in LiveNote, choose **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.

2. Click the **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 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



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 real-time session through the USB port. The adapters are listed from most recommended to least recommended. You can purchase most these adapters at computer or electronics stores or on the Web from the manufacturers or computer retailers.

Manufacturer	Image	Compatibility and Notes
IOGear www.iogear.com Part #GUC232A		compatible with Windows 98SE, ME, 2000, and XP and Windows Vista (XP drivers are supported by Windows Vista)
Belkin www.belkin.com Part #F5U103		compatible with Windows 95, 98, ME, 2000, and XP no longer manufactured
Belkin www.belkin.com Part #F5U109		compatible with Windows 98, 98SE, ME, 2000, and XP no longer manufactured
Belkin www.belkin.com Part #F5U409V1		compatible with Windows 98, 98SE, ME, 2000, and XP
Targus www.targus.com Part #PA088U		compatible with Windows 98, ME, 2000, and XP
Hawking www.hawkingtech.com HUC232S		compatible with Windows 98SE, ME, 2000, and XP

USB to Serial Adapters

Manufacturer	Image	Compatibility and Notes
<p>Sewell</p> <p>www.sewelldirect.com</p> <p>Part #n/a</p>		<p>compatible with Windows 98SE, ME, 2000, and XP and Windows Vista (with latest driver download)</p>
<p>Aten</p> <p>www.aten.com</p> <p>Part #UC232A</p>		<p>compatible with Windows 98, ME, 2000, 2003, and XP and Windows Vista</p>
<p>Radio Shack</p> <p>www.radioshack.com</p> <p>Part #26-183</p>		<p>compatible with Windows 98, 98SE, ME, 2000, and XP</p> <p>not recommended for use with LiveNote</p>
<p>Keyspan</p> <p>www.keyspan.com</p> <p>Part #USA-19HS</p>		<p>compatible with Windows 98, ME, 2000, and XP and Windows Vista</p> <p>not recommended for use with LiveNote</p>
<p>Dynex</p> <p>www.bestbuy.com</p> <p>Part #DX-UBDB9</p>		<p>compatible with Windows 98, ME, 2000, and XP</p> <p>not recommended for use with LiveNote</p>

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