

# Paralegal Guide to LiveNote Software

Version 10



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# 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](mailto: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](http://west.thomson.com/support).

## **Reference Materials**

To browse and order free LiveNote reference materials, visit [west.thomson.com/westlaw/guides/LiveNote.aspx](http://west.thomson.com/westlaw/guides/LiveNote.aspx).

LiveNote also contains valuable online Help.

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# Connecting to a Simulated Real-Time Transcript

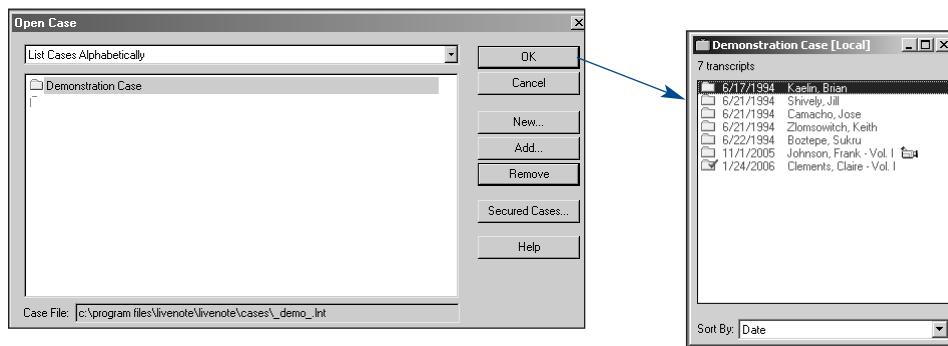
LiveNote is software that allows you to view and work with deposition transcripts. When LiveNote is installed, it provides you with a demonstration case, which includes sample deposition transcripts, exhibits, preset issues, and the simulation of a real-time deposition. You can use the simulated transcript to practice using the basic tools of LiveNote. To access the simulation, you must create a new transcript that can receive the simulated transcript and then connect to the simulated transcript.



## Creating a New Transcript

To create a new transcript, complete these steps:

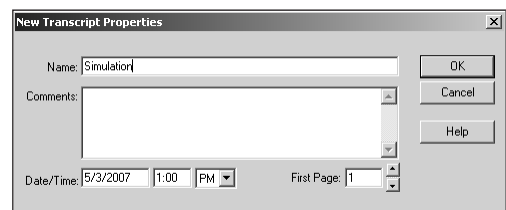
1. Access LiveNote.
2. When the Open Case dialog box is displayed, select **Demonstration Case** and click **OK**. The case window is displayed. It lists all the transcripts for the case.



3. You can create a new transcript using either of the following methods:

- Click the **New Transcript** button on the toolbar at the bottom of the LiveNote window.
- From the Transcript menu, choose **New**.

The New Transcript Properties dialog box is displayed.



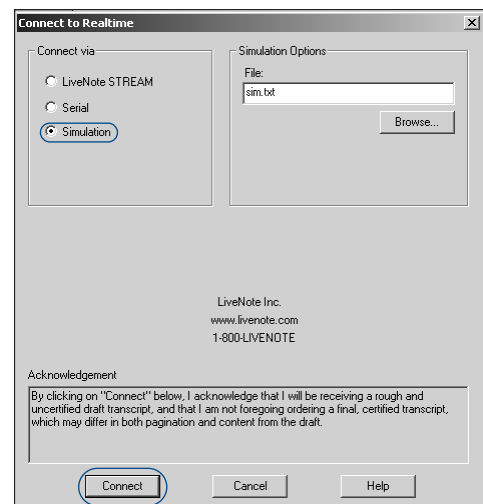
4. Type **Simulation** in the *Name* text box and click **OK**. A new, blank transcript is displayed.



## Connecting to the Simulated Transcript

To connect to the simulated transcript, 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. Select **Simulation** and click **Connect**. The deposition automatically begins transcribing in the transcript window.



# Connecting to LiveNote in Real-Time



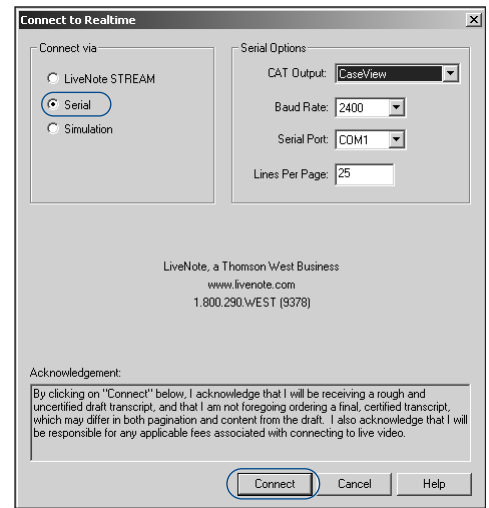
## Connecting via a Serial Connection

You can connect to a LiveNote session in real-time using serial cables.

LiveNote cabling requires a serial port on your computer. If you have only a USB port available, you will need to provide a USB to serial adapter. If a USB to serial adapter is not available, you can connect to the LiveNote session over the Internet via LiveNote Stream™. Contact West Court Reporting Services *24 hours in advance* to schedule the session.

To connect to a real-time session using serial cables, complete these steps:

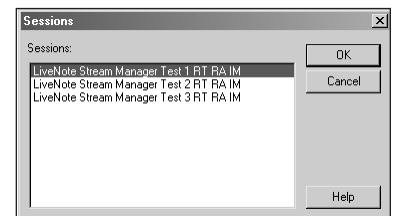
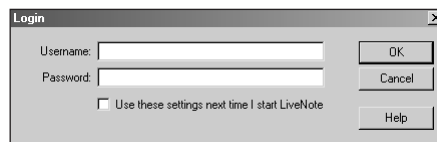
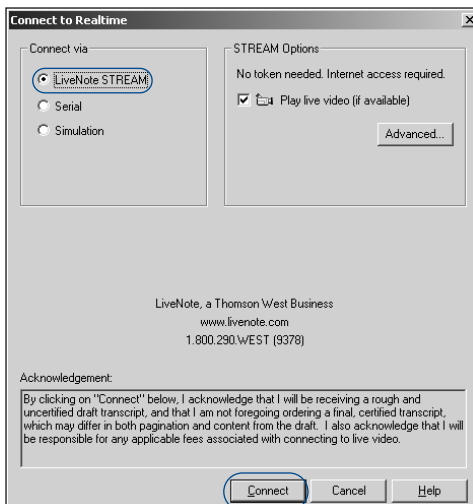
1. Open a new transcript.
2. Click the **Connect** button on the toolbar at the bottom of the LiveNote window to display the Connect to Realtime dialog box.
3. Select **Serial**. The court reporter will give you the necessary settings for connecting to the reporter's CAT (computer-aided transcription) system. You will need to know the required serial port setting.
4. Click **Connect** to connect to the real-time session.



## Connecting via the Internet

LiveNote Stream allows you to connect to a LiveNote real-time session via the Internet. Contact West Court Reporting Services *24 hours in advance* to schedule the session. LiveNote will send you an e-mail with the required username and password. To connect to a LiveNote Stream session, complete these steps:

1. Open a new transcript.
2. Click the **Connect** button on the toolbar at the bottom of the LiveNote window to display the Connect to Realtime dialog box.
3. Select **LiveNote Stream** and click **Connect** to display the Login dialog box.
4. Type the username and password sent to you by LiveNote and click **OK** to display the Sessions dialog box.
5. Select the session you want to attend and click **OK**.



# LiveNote Basic Tools

LiveNote provides you with tools that are easy to use even when you are working with a real-time transcript in a live deposition. You can stop and start the scrolling text, annotate the text, and do quick word searches at the same time that you are listening to what the deponent is saying. You can also annotate and search existing transcripts.



## Starting and Stopping Text

To stop the scrolling real-time transcript while in a deposition, press the **Esc** key or click the **Stop** button on the toolbar at the bottom of the LiveNote window. The line currently being transcribed is completed and the scrolling transcript pauses.

To browse the text of the transcript, you can use the scroll bar on the right or press the **Page Up** and **Page Down** keys or the arrow keys on your keyboard. Pressing **Ctrl+Home** will take you to the top of the text; pressing **Ctrl+End** will take you to the end of the text.



To restart the scrolling transcript, press the **Esc** key or click the **Continue** button on the toolbar at the bottom of the LiveNote window.

## Using Quick Marks

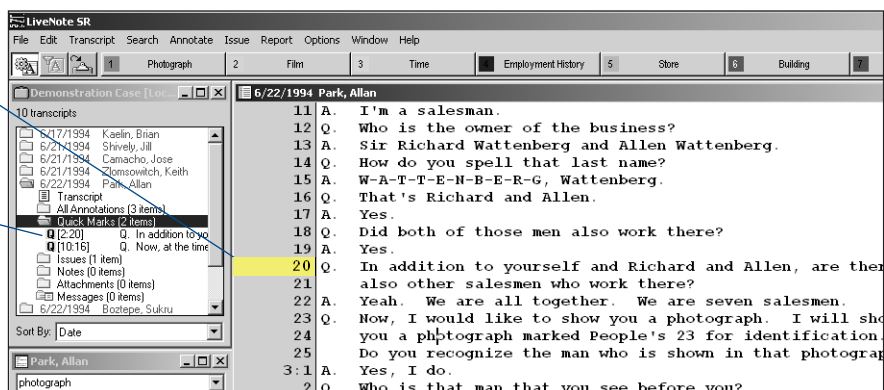
Quick Marks are marks at the line number in the margin of a transcript. They are the simplest form of annotation in LiveNote and are displayed as a solid bar in the default Quick Mark color. You can use them as place markers in the text for which you can run searches and generate reports. To insert a Quick Mark, press the **spacebar** on your keyboard or click a line number.

A complete list of all Quick Marks in a transcript is located in the Quick Marks folder under the transcript in the case window. Click the **Quick Marks** folder to open it. Double-click a Quick Mark reference in the folder to jump to the Quick Mark in the transcript.

To delete a Quick Mark, click it in the margin of the transcript.

Press the **spacebar** or click a line number to place a Quick Mark in the margin of the transcript.

Double-click a Quick Mark reference in the Quick Marks folder to jump to its location in the transcript.

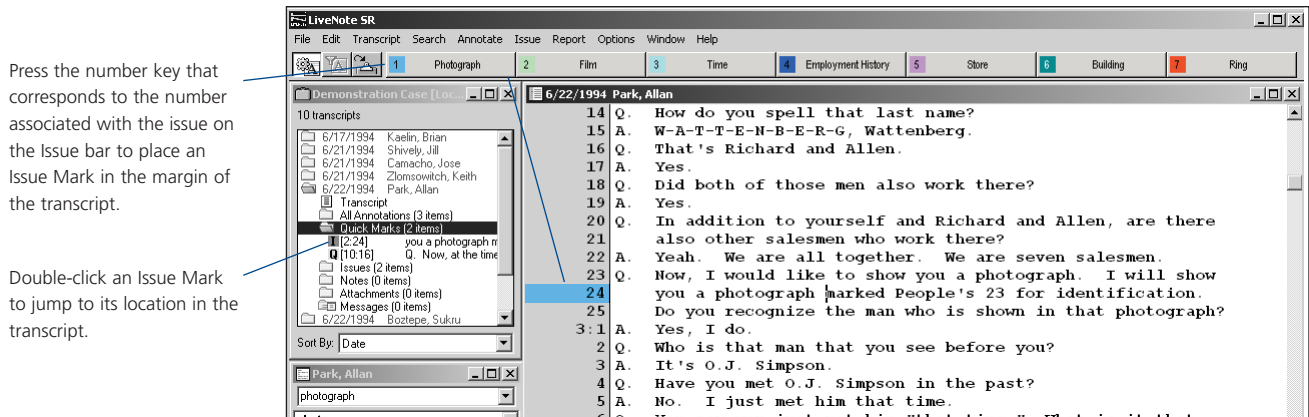


## Using Issue Marks

An Issue Mark is a mark at the line number in the margin of a transcript that corresponds to a particular issue on the Issue bar. The Issue Mark color is the same as the color of the issue. To insert an Issue Mark, press the number key on your keyboard that corresponds to the number assigned to the issue on the Issue bar.


A complete list of all Issue Marks is located in both the Quick Marks folder and the Issues folder in the case window. You can view the issues by category in the Issues folder. Click the **Quick Marks** or **Issues** folder to open it. Double-click an Issue Mark reference in the folder to jump to the Issue Mark in the transcript.

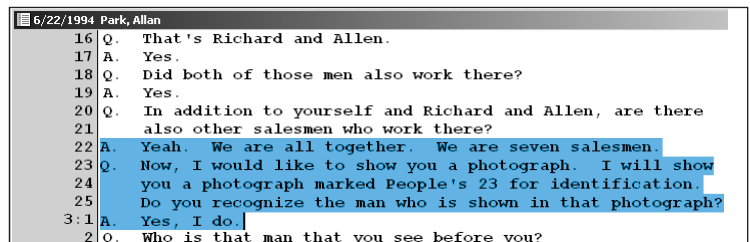
To delete an Issue Mark, click it in the margin of the transcript.



## Adding Annotations Using the Issue Bar

An annotation is a highlighted portion of the transcript text. It may be associated with an issue, a note (a comment associated with an annotation), or an attachment, e.g., a document or image. To add an annotation associated with an issue using the Issue bar, complete these steps:


1. Click the **Auto Annotation** button (  ) on the Issue bar to cancel its selection.
2. Click an issue button on the Issue bar to select the issue and assign it to the annotation you are adding.
3. Select the text you want to annotate. The text is highlighted with the color of the issue you selected. The issue will be assigned to every annotation you create until you cancel its selection on the Issue bar.




**Note:** You can select more than one issue from the Issue bar. The annotated text will be highlighted with the color of the issue that is first in alphabetical order.

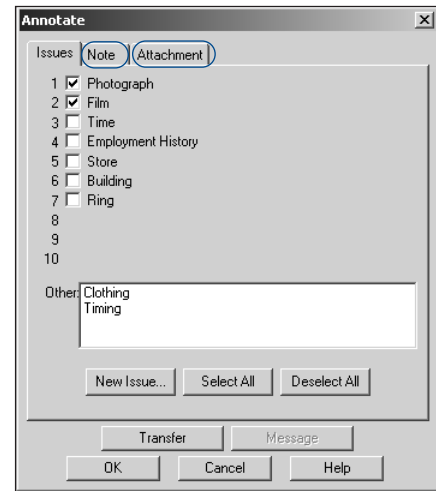
## Adding Annotations Using the Annotate Dialog Box

To add an annotation associated with an issue, note, attachment, or a combination of these, complete these steps:

1. Make certain the Auto Annotation button () on the Issue bar is selected. (This is the default setting.)

The annotated text is highlighted with the color of the issue you select. If you do not select an issue, the text is highlighted with the default annotation color.

2. Select the text in the transcript you want to annotate. The Annotate dialog box is displayed.
3. The Issues tab in the Annotate dialog box displays the prioritized list of issues. Note that the check boxes for any issues you previously selected on the Issue bar are already selected. To assign one or more issues to the annotation, select the appropriate check boxes. If an issue has not been prioritized (does not appear on the Issue bar), it is listed in the *Other* list box. To assign a non-prioritized issue, select it in the *Other* list box. To prioritize the issue, right-click it and drag it next to a number.
4. To add a note to the annotated text, click the **Note** tab and type your note in the text box.
5. To add an attachment to the annotated text, click the **Attachment** tab. You can add any type of file that can be opened on your computer. Click **Browse** to display the Find Attachment dialog box. Select your document and click **Open**. When you add an attachment, a paper clip icon () is displayed in the margin next to the annotated text.
6. Click **OK** to save the annotation.



## Creating Reports for Quick Marks, Issue Marks, or Annotations

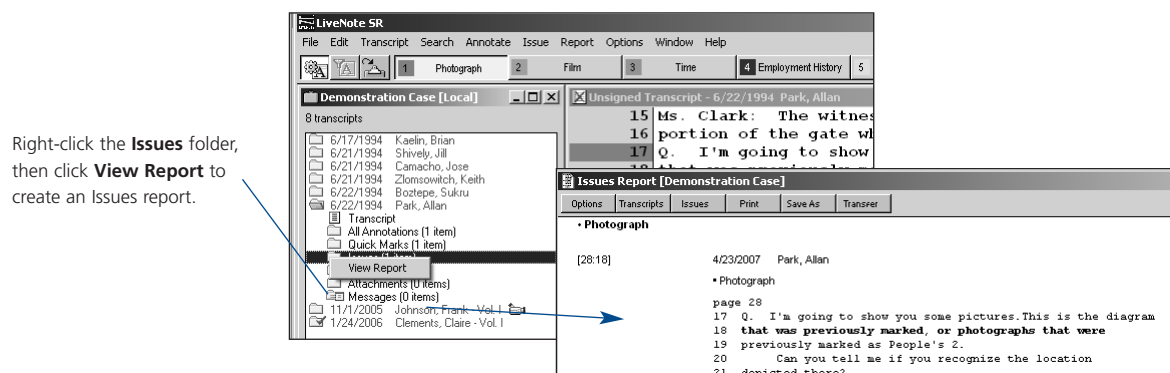
To create a report for Quick Marks, Issue Marks, or annotations, right-click the folder in the case window for which you want to create the report, e.g., **Issues**. Click **View Report** to display your report, which includes the line you marked and the surrounding question and answer.

To generate a report using all transcripts, click **Transcripts** at the top of the report to display the Report Transcripts dialog box. Click **Select All**, then click **OK**.

To restrict your report to a particular issue, click **Issues** at the top of the report to display the Report Issues dialog box. All issues are automatically selected. To remove an issue from the report, clear its check box or cancel its selection in the *Other* list box. Click **OK**.

To return to the location in the transcript where the mark appears, double-click its section in the report or choose the transcript from the **Window** menu.

To return to the report from the transcript window, press **Ctrl+Tab** or choose it from the **Window** menu. New annotations are automatically added to the report as you create them, so the report is always current.



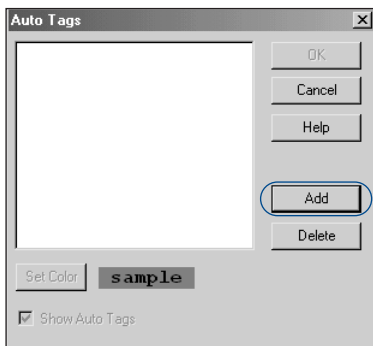


## Creating Auto Tags

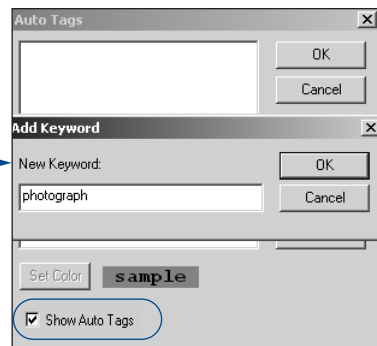
Use Auto Tags to automatically highlight words or phrases as they appear in the transcript. Click the **Auto Tags** button on the toolbar at the bottom of the LiveNote window to display the Auto Tags dialog box.

For each word or phrase you want to add, complete these steps:

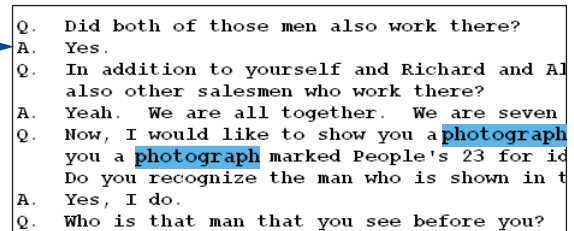
1. Click **Add** to display the Add Keyword dialog box.
2. Type the word or phrase you want to add to the Auto Tags list. You can use the asterisk (\*) at the beginning or end of a word to include variations of the word. Then click **OK**. The word or phrase is added to the list in the Auto Tags dialog box.
3. Select the **Show Auto Tags** check box to highlight Auto Tags in transcripts.
4. Click **OK** to save your changes. Your Auto Tags will be highlighted automatically throughout the transcript.



Auto Tags dialog box

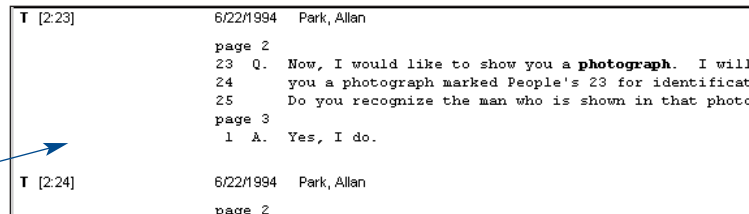
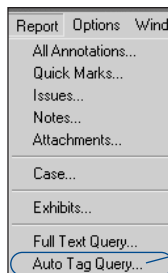


Add Keyword dialog box



Transcript with highlighted Auto Tags

To create an Auto Tags report, from the Report menu, choose **Auto Tag Query**.



## Using the Word Wheel

Use the Word Wheel to search for a word in the transcript. Type the word in the text box on the left side of the LiveNote window to display the pages and lines where the word is found in the transcript.

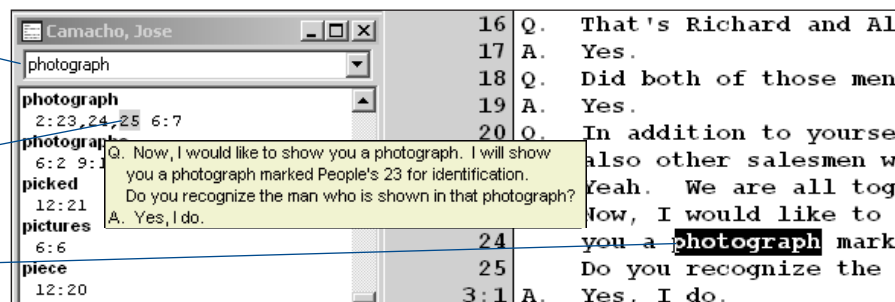
To see the word in context, hold your pointer over the page and line reference. The question and answer in which the word appears is displayed.

To display the word in the transcript, click the page and line reference.

Type the word you want to search for in the Word Wheel text box.

Hold your pointer over the page and line reference to see your word in context.

Click the page and line reference to view your word in the transcript.

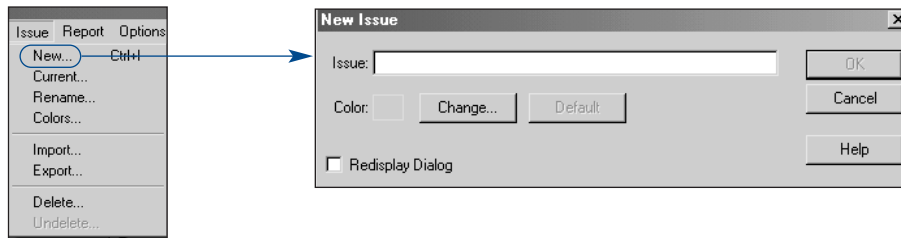




## Creating Issues

To create a new issue, complete the following steps:

1. From the Issue menu, choose **New** to display the New Issue dialog box.



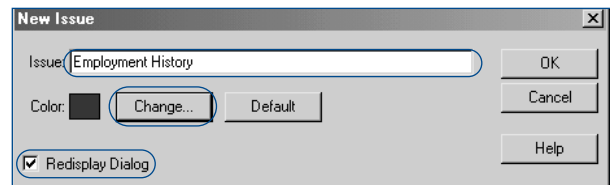
2. Type the name of the issue in the *Issue* text box, e.g., **Employment History**.

3. Select the **Redisplay Dialog** check box if you are creating multiple issues.

4. Click **Change** to display the Color dialog box.

5. Select a color and click **OK**.

6. Click **OK** in the New Issue dialog box.



## Prioritizing Issues



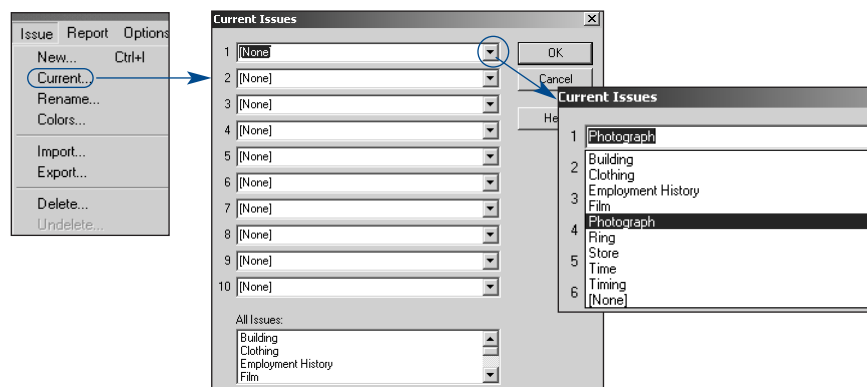
To prioritize an issue and add it to the Issue bar, complete the following steps:

1. From the Issue menu, choose **Current** to display the Current Issues dialog box.

2. Click the arrow in the first text box to display the list of issues.

3. Select an issue, e.g., **Photograph**. This issue is assigned to the number 1 in the priority list and is added to the Issue bar.

4. Repeat steps 2 and 3 for each issue. You can prioritize up to 10 issues. Click **OK** when you finish prioritizing the issues.



You can also drag an issue in the *All Issues* list box to a text box.

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