

## Case Notebook 5.5 – Release information for July 2020

*The Westlaw Case Notebook release includes the following enhancements:*

### **Compatibility with TLS 1.2 protocol for increased security for firms to connect to their repository**

Transport Layer Security (TLS) protocol is an industry standard designed to help protect the privacy of information communicated over the internet. TLS version 1.2 provides security improvements in privacy and data integrity over previous versions. Case Notebook has been upgraded to support TLS 1.2 and will connect properly to repositories for firms that use this protocol.

### **Option to control which Data Groups display in the navigation pane**

A new field, Data Groups, is now available in the Display Options > General tab in Case Notebook with the 'Hide empty data groups in navigation pane' checkbox. Users can select the checkbox to display only data groups with content in the navigation pane.

### **New sub-menu in the Sort By Data Groups menu for content categories in the navigation pane**

A new sub-menu is now available in the Sort By Data Groups menu for content categories in the navigation pane in Case Notebook. Users can do a secondary sort to the data groups by title, date, and reverse date.

### **Updated KeyCite flags in Case Notebook**

The KeyCite flag symbols and icons in Case Notebook have been updated.

### **Compatibility with Windows Server 2019 and Office 2019 applications**

Case Notebook is now compatible with Windows Server 2019 operating system and Office 2019 applications such as Word, Outlook, Excel, and PowerPoint. When users are ready to upgrade, Case Notebook will integrate correctly with the new environments and applications.

### **New option available to change how Case Notebook authenticates users of Active Directory**

At firms using the "Authenticate users against Active Directory" option in Case Notebook Administration, users must be granted the "Access this computer from the network" permission. For those customers who prefer not to enable this right in their Active Directory Authentication group policy, there is a new option available to change the Active Directory authentication method used for Case Notebook.

*The following improvements correct known issues from earlier versions:*

### **Corrected search for long doc-level notes, annotation notes and key fact descriptions**

All annotation notes, document-level notes and key fact descriptions longer than 254 characters without a line break will have a line break added at a minimally intrusive point, and the note or description will be re-indexed so that searches will find all search terms in long user-applied annotation content.

### **Transcript annotation notes are indented properly when sent to Word from the Case Notebook viewer window**

When users send transcript annotation notes to Microsoft Word from the Send > Word function in the viewer window, the selected text will be displayed with proper indentation in the Word document.

### **Key Facts Reports display large images**

When a Key Facts report is generated with source documents that contain large images, the report will display the images correctly.

### **Words after the line break in Key Facts descriptions are highlighted correctly in the Full-Text Search Report results**

Search terms will be highlighted correctly in the Full-Text Search Report results regardless of where they are placed in Key Facts descriptions with line breaks.

### **Doc-Level notes are displayed in search results when a repository case is replicated online**

Document level notes for content items will be displayed in the search results after a repository case is replicated online.

### **Columns are displayed correctly when Issues Report and Case Report is saved in CSV format**

When the Issues Report or Case Report is saved in CSV format, the date column matches the date that is displayed in these reports in Case Notebook.

### **Removal of incorrect watermark from the footer in Case Notebook Administration reports exported in PDF format with the Thomson Reuters Software Suite PDF printer**

Case Notebook Administration reports that are printed in PDF format with the Thomson Reuters Software Suite PDF printer will not display an incorrect novaPDF watermark on the lower left corner (footer) of each page of the PDF.

### **Microsoft Word 64-bit version of Office will work correctly when the Drafting Assistant > Case Notebook plug-in is used**

Users will be able to access their cases and perform functions such as open selected content items in Case Notebook, view Case Notebook transcripts and images in the Drafting Assistant viewer window, and access the Word Index when Drafting Assistant is integrated in Microsoft Word 64-bit version of Office.

*The following are known issues for Case Notebook 5.5:*

### **OCR function may need to be turned off while importing load files with many images**

Users may need to turn off the optical character recognition (OCR) function by deselecting the 'OCR (if applicable)' check box when importing a load file with a large number of images. The OCR function may be turned back on and run after the load file has been successfully imported.

## Case Notebook 5.1.1 – Release information for February 2020

*The following improvements correct known issues from earlier versions:*

### **Corrected search bug for long doc-level notes, annotation notes and key fact descriptions**

All annotation notes, document-level notes and key fact descriptions longer than 254 characters without a line break will have a line break added at a minimally intrusive point, and the note or description will be re-indexed so that searches will find all search terms in long user-applied annotation content.

## Case Notebook 5.1 (Limited Release) – Release information for November 2019

*The Westlaw Case Notebook release includes the following enhancements:*

### **Compatibility with TLS 1.2 protocol for increased security for firms to connect to their repository**

Transport Layer Security (TLS) protocol is an industry standard designed to help protect the privacy of information communicated over the internet. TLS version 1.2 provides security improvements in privacy and data integrity over previous versions. Case Notebook has been upgraded to support TLS 1.2 and will connect properly to repositories for firms that use this protocol.

### **Compatibility with Windows Server 2019 and Office 2019 applications**

Case Notebook is now compatible with Windows Server 2019 operating system and Office 2019 applications such as Word, Outlook, Excel, and PowerPoint. When users are ready to upgrade, Case Notebook will integrate correctly with the new environments and applications.

### **New option available to change how Case Notebook authenticates users of Active Directory**

At firms using the “Authenticate users against Active Directory” option in Case Notebook Administration, users must be granted the “Access this computer from the network” permission. For those customers who prefer not to enable this right in their Active Directory Authentication group policy, there is a new option available to change the Active Directory authentication method used for Case Notebook.

*The following improvements correct known issues from earlier versions:*

### **Removal of incorrect watermark from the footer in Case Notebook Administration reports exported in PDF format with the Thomson Reuters Software Suite PDF printer**

Case Notebook Administration reports that are printed in PDF format with the Thomson Reuters Software Suite PDF printer will not display an incorrect novaPDF watermark on the lower left corner (footer) of each page of the PDF.

### **Microsoft Word 64-bit version of Office will work correctly when the Drafting Assistant > Case Notebook plug-in is used**

Users will be able to access their cases and perform functions such as open selected content items in Case Notebook, view Case Notebook transcripts and images in the Drafting Assistant viewer window, and access the Word Index when Drafting Assistant is integrated in Microsoft Word 64-bit version of Office.

## Case Notebook 5.0 – Release information for July 2019

*The Westlaw Case Notebook release includes the following enhancements:*

### **Updated interface to enable users to find the important tools more easily**

Case Notebook software has an updated interface. Larger buttons and customized ribbons put the tools where users need them.

### **Create custom categories to organize your case**

Case Managers may create new categories in which to place case content. Instead of just documents and pleadings, up to five new categories may be created and named for the needs of that case. Case Managers may also determine the order in which the content categories appear in the case menus.

### **Move content items between categories**

Content items may now be moved between categories. When users upgrade cases from an earlier version of Case Notebook, they may create new custom categories and move content items into those new categories without losing notes, issue marks, custom properties, or other work-product. As a case progresses, a new category of content may be added to the case to enable users to work more efficiently, and content may be moved into the new category.

### **Include the transcript text in a Designations Report**

Case Notebook now may include the appropriate section of transcript text associated with a given designation in a properly formatted text report. Users will have the option to include the transcript text with line and page numbering in the report output.

### **Right-click option for Send to Email from grid view or navigation pane**

Sending a content item out of Case Notebook via email is now an option. This can be done by using the right-click menu on a content item from the navigation pane, or from the grid list in the display pane.

### **Recognition of PTX or PTZ files from E-Transcript Manager with integrated security**

Obtain transcripts via email from a court reporting agency in PTX or PTZ file format with enhanced security and import those files into Case Notebook without any additional steps.

*The following improvements correct known issues from earlier versions:*

### **PDF report output now contains the full selected portion of an image document**

Image content items included in a report exported in PDF format will now display the entire image portion as well as the text of the content item.

### **Print to PDF for reports no longer displays incorrect watermark/license message**

An incorrect licensing watermark on PDF report output has been removed.

### **Improved syncing between content items opened in a separate viewer window and the main application**

There is improved syncing between content items that are opened in a separate viewer window and the main Case Notebook application.

**Corrected an issue regarding displaying Case Notebook content in Drafting Assistant when Office 2016 is used**

'Copy' and 'Send' Case Notebook content using the right-click functionality in Drafting Assistant now works and sends the content into MS Word in Office 2016.

**Corrected an issue regarding missing data from Case Report**

Missing data for various content types now appears in Case Report saved in CSV format.

**Corrected an issue regarding displaying incorrect date and year information for content items in annotation report sent via email**

Date and year information for transcript appear correctly in annotation report sent via email.

**Corrected an issue where linked exhibits in some PTZ files were displaying in an incorrect sort order in the navigation pane**

Exhibit links in the navigation pane for transcript now appear in the same order in which the exhibits appear in the transcript text.

**User is no longer required to sign out of the repository to close a user session**

When Case Notebook is closed by the user in a shared case, the user session is automatically closed in the repository. User is no longer required to sign out of the repository to close a user session. The session is automatically closed when the user closes Case Notebook.

## Case Notebook 4.7 – Release information for March 2018

*The Westlaw Case Notebook release includes the following enhancements:*

### **Capture chat text from a LiveNote realtime session**

Save chat text between participants in your group at the close of a LiveNote realtime session.

### **Receive custom properties sent from Case Logistix**

Case Logistix users classify discovery documents using custom properties created in Case Logistix. Capture more of that work by creating matching custom properties in Case Notebook. Case Notebook will receive and map the data from the document sets transmitted from Case Logistix.

### **Create Case Notebook Administration Audit Report**

Case Notebook administrators can create audit reports. Review important actions in the organization's case repository, like creating and deleting of cases, users, and groups.

*The following improvements correct known issues from earlier versions:*

### **Viewer window(s) can be closed when closing Case Notebook**

Documents opened in a viewer window may be automatically closed when Case Notebook is closed, or you may select an option to receive a prompt before closing documents in the viewer window.

### **'Send' selection from a Transcript in the Drafting Assistant viewer corrected**

If you access Case Notebook transcript content from within the Drafting Assistant viewer, you can now use the 'Send' functionality to send excerpts into a document within your word processor.

### **'Send' Key Fact functionality from the right-click menu in grid view**

Use 'Send' Key Fact from the right-click menu in the grid view to send selected key facts.

### **Designation display column heading warning added to Page Setup dialog box when sending a condensed report to print**

When printing Designations on Transcripts, overlapping text may occur if there is excessive text in the heading describing the designation bars. A warning is displayed in Page Setup for condensed report printing to alert that column heading size is limited, and this may cause issues in the print display.

### **Deleting selected Key Facts from the Grid View properly deletes the Key Fact without modifying the order**

When multiple Key Facts are selected, the highlighted key fact is deleted properly. The order of the remaining selected key facts is not modified in the grid list after the deletion.

### **Exporting an annotated transcript, with an attachment, maps the attachment correctly**

Exporting annotated transcripts, with attachments and importing the transcripts into another case, the attachment is properly linked and may be opened by a user in the new case.

**Updating a Transcript, with modified exhibits, properly uploads and links the exhibits**  
Updating a Transcript for which the Court Reporter linked modified exhibit documents will result in the old exhibits being removed and replaced by the correct updated exhibits.



## Case Notebook 4.6 – Release information for October 2017

*The Westlaw Case Notebook release includes the following enhancements:*

### **Addition of content viewer window for working with multiple monitors or wide-screen capability**

Open multiple content items in separate viewer windows for independent placement on monitor screens. Full annotation functionality is available in the viewer windows with synchronization of work-product to the Case Notebook main application. View deposition transcripts side-by-side with important exhibits for maximum efficiency. This feature is not available to Case Notebook Research-only, Case Notebook Transcripts, and Hosted environment customers.

### **Create a new Key Fact from an existing Key Fact**

When creating a key fact with properties similar to an existing key fact, save time by copying the existing key fact to create a new one. Simply give the copied key fact a new name and all of the properties, including custom properties, will be created.

### **Search through list of local or repository cases by title**

Search through your list of cases on the Open Case dialog box to locate the case you need without scrolling through a long list of cases.

### **Jump to a recently opened case**

Up to 15 cases you have accessed most recently will be listed on a separate menu in the Open Case dialog box, enabling you to return to your immediate cases quickly.

### **Expand or collapse the word index with a single mouse click**

Control the Word Index tool on Case Notebook content items by opening or closing the word index window with a single mouse click.

### **Delete a local case**

Delete a local case from your Case Notebook files with one command from File menu.

### **Case Notebook Administration password recovery via security questions**

Users will now have the option to set up security questions to permit signing into Case Notebook Admin in case of a forgotten password.

### **Key Facts may now be saved and output in user-selected order**

Sort your facts in the Key Facts grid and print or save the list in the order you have selected.

### **Improved synchronization of annotations, designations, and summary items when updating a Transcript**

Draft transcripts with user-applied annotations, quick marks, designations, and summary items may need to be updated with a final version of the transcript that contains significant text changes. Case Notebook will now place annotations, quick marks, designations, and summary items with greater accuracy on the final transcript.

### **Case Notebook Administration User Group and Offline Cases reporting**

Admin users may now generate a report showing permissions for user groups in a case and a report for offline cases from the Case Notebook Admin tool.

*The following improvements correct known issues from earlier versions:*

### **Upgrade the version of print technology installed with Case Notebook**

Print technology installed with Case Notebook was upgraded.

### **Corrected error in highlighting search hits in the Navigation panel**

Search terms are now highlighting correctly and in full on the list of search results in the Navigation pane.

### **Improved the sort order for titles in grid lists that contain numbers**

Titles containing numbers now sort correctly in alphanumeric order rather than sorting based upon individual digits only.

### **Removed erroneous column header line in .csv output of Character list**

When saving the Character list in .csv format, Case Notebook no longer adds an additional header line.

### **Document-level notes now appear in .csv when reports are output**

When reports are output in .csv format, the document-level notes will now be included in the data output.

### **Corrected issues with printing and saving Outlines and linked Exhibits**

When saving or printing an Outline with linked Exhibits from Case Notebook, the correct number of copies of the Outline and Exhibits selected will print. The Exhibit copies will print in the order the Exhibits appear in the Outline.

### **Designation Report includes video position information when available**

Users will now receive video position information in a Designation Report if the transcript contains associated video data.

### **Key Fact Report sorts key facts by date when displayed in date order**

When the user selects the 'Sort by: Date' option to sort key facts by date, the key facts report will retain date order when output from Case Notebook.

### **OCR Content during import selection retains user-selected default**

The user's default choice whether to OCR content upon import is retained across Case Notebook sessions.

### **Create a new user with Active Directory authentication turned on**

When creating a new user with Active Directory authentication in Case Notebook Admin, the system will create a correct default password for the user and retain the permission settings selected.

*The following are known issues for Case Notebook 4.6:*

**Sending a Designation with video content to PowerPoint fails**

Using the 'Send to PowerPoint' function to send a designation with associated video content causes PowerPoint to crash.

**Sending an annotation to Word from a native document does not include the document citation**

When a user sends annotated text from a native format document to Word, the document citation to title and page number is not included with the text.

**Print to PDF for Reports**

When using the 'Case Notebook PDF Printer' for Reports, an incorrect watermark/license message shows at the bottom of the reports.

## Case Notebook 4.5.1 – Release information for May 2017

*The following improvements correct known issues from earlier versions:*

### **Corrected integration issue with Drafting Assistant Litigation version 4.360**

Corrected issue which caused installation of Drafting Assistant Litigation version 4.360 to fail if users have Case Notebook version 4.5 installed.

## Case Notebook 4.5 – Release information for February 2017

*The Westlaw Case Notebook release includes the following enhancements:*

### **Batch Import Key Facts via .csv file**

Quickly populate the Key Facts table with key descriptions, dates and create links to source information using a .csv file batch import option. Sources referenced in the .csv file will be automatically linked to existing documents in Case Notebook. Property names in the load file will be **automatically** mapped by title to matching Case Notebook Key Fact field names, or may be manually mapped by the user.

### **Full-text Documents, Transcripts, Pleadings and Research as Sources for Key Facts**

Assign full-text Documents, Transcripts, Pleadings and Research data items as Sources for Key Facts in Case Notebook. Data items may be associated with Key Facts in the Key Facts Properties dialog or in the properties dialog for any particular document. Users may search for documents by title or date on the Key Facts Properties > Sources tab.

### **Improved Integration with Case Timeline**

Full-text source Documents, Transcripts, Pleadings and Research data items may be exported with Key Facts from Case Notebook to Case Timeline. Custom properties created within Case Notebook may now be exported to Case Timeline, mapped to columns in the Timeline Event Entry Table and Chronology and displayed on charts.

### **Batch Import Data with Load File Improvements**

Property names in the load file will automatically be mapped by title to matching Case Notebook field names, or may be manually mapped by the user. Case Notebook will automatically recognize certain types of load files.

### **Reports - Batch Save Source Documents, Transcripts, Pleadings and Research**

Save Reports with all referenced source Documents, Transcripts, Pleadings and Research items as separate PDF files. The Report will serve as a hyperlinked table of contents, providing convenient linking to the saved source items. This new batch save feature will be available for Issues, Key Facts, All Annotations and other reports.

### **Outlines - Batch Save Source Documents, Transcripts, Pleadings and Research**

Save Outlines with all of the referenced source Documents, Transcripts, Pleadings and Research items as separate PDF files. The Outline will serve as a hyperlinked table of contents, providing convenient linking to the evidentiary source items referenced in the Outline.

### **Reports Usability Enhancements**

Reports now include options to select different report display fonts, to modify or remove the icon display in the report, and to display transcript dates with titles. Issue color display has also been improved to display the issue color of the reported item.

### **Compatibility with Windows Server 2016 and SQL Server 2016**

Added compatibility with Microsoft Windows Server 2016 operating system and SQL Server 2016.

*The following improvements correct known issues from earlier versions:*

**Removing erroneous PDF component licensing message from Batch Save documents**

Corrected issue which placed an incorrect message regarding NovaPDF licensing on the Batch Save as PDF output.

**Unassigned Annotations Removed from All Annotations Report when selection box is de-selected**

Corrected issue with All Annotations Report which persisted display of highlighted passages, which are not assigned to a named Issue, when the "Include Annotations or Doc-Level Notes with no Issues" is de-selected.

*The following are known issues for Case Notebook 4.5:*

**Inserting MPEG-2 video into Microsoft PowerPoint 2010 or 2013 presentation**

A known issue with Microsoft produces "PowerPoint cannot insert a video from the selected file" error when trying to insert an MPEG-2 video into a PowerPoint 2013 or 2010 presentation. Microsoft offers workarounds in their knowledge base.

## Case Notebook 4.0.1 – Release information for July 2016

*The Westlaw Case Notebook release includes the following enhancements:*

### **Video Position Information for Designations List Report**

The Designations List Report will now contain the specific video position information for each designation.

### **Designation Pattern Usability Improvement**

The patterns distinguishing designation bars in transcript display and printouts have been modified for increased visibility in the software and printouts.

*The following improvements correct known issues from earlier versions:*

### **Research from Westlaw with very long file names**

Case Notebook accepts Research data from Westlaw with very long file names by truncating file names with more than 256 characters.

### **The Designation List Report page breaks**

The designation list report has been corrected so that there is no incorrect page break inserted between page and line numbers of a single designation.

### **Batch saving PDF files with certain characters in the file name**

Batch saving PDF files in Case Notebook now creates valid links when the file name contains special characters recognized by Microsoft Word and WordPerfect.

*The following are known issues for Case Notebook 4.0.1:*

### **Inserting MPEG-2 video into Microsoft PowerPoint 2010 or 2013 presentation**

A known issue with Microsoft produces "PowerPoint cannot insert a video from the selected file" error when trying to insert an MPEG-2 video into a PowerPoint 2013 or 2010 presentation. Microsoft offers workarounds in their knowledge base.

## Case Notebook 4.0 – Release information for June 2016

*The Westlaw Case Notebook release includes the following enhancements:*

### **Customizable Properties**

Create custom data properties for Transcripts, Documents, Pleadings, Research and Key Facts.

### **Batch Save As PDF**

Save numerous file types to PDF at one time using the new **File** menu, **Batch Save as PDF** option. Upon save, a folder is created in the location you specify with a text file that provides a linked table of contents for the data you saved. Each file is saved into a subfolder for the data type as an individual PDF.

### **Tabular/Grid View for all Data Categories**

Grid views display a list of all of the files of a certain type in a case and allow you to save a CSV of all or some files in the list; sort files by title, date, issue, etc; add or remove columns; move columns; and freeze the first column in the List View. By default, you can click a category in the Navigation pane to display the List View for that category in the Display pane.

### **Designations Printing**

A new option allows you to select to print only the pages of the transcript that contain designated text.

### **Windows 10 Compatibility**

Added compatibility with Microsoft Windows 10 Home and Pro operating systems

### **Office 2016 Compatibility**

Added compatibility with Microsoft Office 2016.

### **Microsoft SQL Server 2014 and SQL Server 2014 Express Compatibility**

Added compatibility with Microsoft SQL Server 2014. Case Notebook and Case Notebook Administration now install with Microsoft SQL Server 2014 Express.

### **OCR Multiple Files at Time of Import**

Added a selection box to the new file import dialog which initiates Optical Character Recognition (OCR) processing for all imported image file formats.

### **Version Lock option**

A new option called “Version Lock” is added to the Case Notebook Administration tool. This option prevents unintended upgrades of a networked Case Notebook case, particularly by users of the desktop software.



### **Copy a secure case in Case Notebook Administration**

Added option in Case Notebook Administration tool to create a copy of any secure (Repository) case, with all of the same data, users and permissions in the original case.

### **Batch upgrade cases in Case Notebook Administration**

A new option in the Case Notebook Administration tool permits administrators to upgrade multiple cases at a time.

*The following improvements correct known issues from earlier versions:*

### **Designation Printing displays bars incorrectly when Designation ends on line 25**

Corrected issue where a Designation ending on line 25 of the transcript incorrectly appears to display the bar ending on line 24.

### **Case Notebook Administration cannot fetch user list from a long Active Directory list**

Corrected issue causing import of groups and users from Active Directory to fail when a very long list of Active Directory groups or users exists.

### **Send to Video file from Annotations Report**

Corrected issue where video clips are not properly named.

### **Installation of Remote Access Server (RAS) on Windows Server 2012**

Corrected issue when installing RAS on Windows Server 2012.

### **Annotation highlights are misplaced in print preview and printout**

Corrected issue where the highlighted areas of annotations are incorrectly placed on certain native format documents (e.g. Microsoft Word), when printing.

*The following are known issues for Case Notebook 4.0:*

### **Inserting MPEG-2 video into Microsoft PowerPoint 2010 or 2013 presentation**

A known issue with Microsoft produces "PowerPoint cannot insert a video from the selected file" error when trying to insert an MPEG-2 video into a PowerPoint 2013 or 2010 presentation. Microsoft offers workarounds in their knowledge base.

## Case Notebook 3.6.1 – Release information for March 2015

*The Westlaw Case Notebook release includes the following enhancements:*

### **Print Designation details on every page for multi-page Designations**

New Page Setup option to print the Designation details in the footer of each page on which the Designation is present.

### **Option to always Print Designation details in footer**

New Page Setup option to print Designation page:line range in the transcript footer regardless of whether the Designation includes a Note.

### **Shorter application startup time when computer is not connected to a network**

Open Case dialog now opens in seconds even when computer is offline.

### **Compatibility with Windows Server 2012 and Windows Server 2012 R2**

Added compatibility with Microsoft Windows Server 2012 and 2012 R2.

### **Compatibility with Microsoft SQL Server 2012**

Added compatibility with Microsoft SQL Server 2012.

### **Open a secure case directly from an .lns file**

Navigate directly to a secure case and bypass the Open Case dialog (assuming the user has that repository in their list) by opening the .lns file associated with that case.

*The following improvements correct known issues from earlier versions:*

### **Reports saved to CSV file do not contain column headings**

Corrected issue where saving a Report to a CSV file resulted in loss of the column headers in the CSV file.

### **Using Send feature from certain text documents does not send complete text to Word or Reports**

Corrected issue where using the *Send* feature from certain text documents resulted in the beginning or ending portions of selected or copied text to be dropped.

### **Word Index will not update if multiple users simultaneously edit same document properties**

Corrected issue with secure cases where Word Index corruption was possible when multiple users simultaneously made edits to the properties of the same document.

### **Missing 'Send to ...' context menus in Outlook 2013**

Corrected issue where the right-click 'Send to Case Notebook as Document' and 'Send to Case Notebook as Pleading' menu options were not present for users of Outlook 2013.

**Print Preview for transcript Word Index printing always displays column headings**

Corrected issue where generating a Print Preview for transcript Word Index always resulted in the display of column headers in the margin.

**Selection of Case Notebook transcript text within Drafting Assistant causes Microsoft Word to become unresponsive**

Corrected issue where selecting text from a Case Notebook transcript within Drafting Assistant caused Microsoft Word to become unresponsive.

**Case Notebook hangs when editing a Designation Type with same name**

Corrected issue causing Case Notebook to become unresponsive when editing a Designation Type that shares an exact title with another Type in the case.

**Outlines cannot print to Adobe PDF printers**

Corrected issue where Outlines could not be printed to Adobe PDF printers.

**Incorrect Send menu options in Hosted Case Notebook**

Corrected issue in Hosted Case Notebook where the Send menu included incorrect options and did not include the Video option.

**Incorrect Designation page numbers display in the transcript footer when printing transcripts that do not begin on p. 1**

Corrected issue with printing Designation details in the transcript footer for any transcripts not beginning with p. 1.

**Unable to scroll through certain transcripts using the arrow keys or the trackball on the mouse**

Corrected issue where the arrow keys and trackball would not properly scroll through the transcript text.

**Video clips created from files accessed through VideoSite are empty**

Corrected video clips created from files accessed through VideoSite were empty.

*The following are known issues for Case Notebook 3.6.1:*

**Case Notebook Administration fails to export Case List to CSV file**

In Case Notebook Administration, the Export Case List option fails to create the Case List CSV file.

## Case Notebook 3.6 – Release information for October 2014

*The Westlaw Case Notebook release includes the following enhancements:*

### **Transcript Designations Feature**

New feature allows users to mark and add notes to important transcript text for use as trial designations. Designated text is indicated both in Case Notebook and in printed transcripts by colored and textured vertical bars in the margin. The transcript with designations and notes can be submitted to the court before trial. Batch import/export designations as CSV to/from opposing counsel and review summaries of all designations via the Designations List Report.

### **Firm Central Integration**

The Case Notebook delivery option in Firm Central enables the export of Firm Central user documents directly to Case Notebook. Users can deliver document originals or web versions that include Firm Central notes and highlighting. Firm Central markup will import to Case Notebook as Annotations and Notes.

### **Display page counts for all Documents, Pleadings, Research**

Total page count and current page number information is displayed when viewing the contents of the Documents, Pleadings, and Research folders.

### **Go to First/Last Page options for all Documents, Pleadings, Research**

Scroll one page at a time or jump to the first or last page for all content in the Documents, Pleadings, and Research folders.

### **Office 2013 Support**

Case Notebook 3.6 supports Microsoft Office 2013.

### **Change to OCR column display in Documents table**

OCR column in the Documents table displays *OCR*, *N/A*, or blank to make it easier to identify the OCR status of a document.

### **CSV added to dropdown list of File Types when importing a Load File**

Added .csv to the list of File Types when importing a load file to Documents, Pleadings, or Research.

### **Updated Case Notebook Help System**

The contents of the Case Notebook help system were reorganized and expanded to provide quick access to all the features and functions of Case Notebook. All content is indexed, searchable, and cross-referenced with other topics.

*The following improvements correct known issues from earlier versions:*

**Video not scrolling text when transcript does not begin on page 1**

Corrected an issue where video playback did not scroll through the transcript text for transcripts that do not begin with page 1.

**Word crashes after using the html send function in Drafting Assistant**

Corrected an issue causing Word to crash when sending text from a Case Notebook document within Drafting Assistant.

**Application becomes non-responsive when tabbing through Transcript Summaries**

Corrected an issue where tabbing through certain Transcript Summary fields caused the application to become non-responsive.

**Data loss when importing 3.5 local case using 3.0 Admin**

Corrected an issue that caused potential data loss when importing a 3.5.x local case using a 3.0 version of Case Notebook Administration.

**4-term searches in quotes crashing Case Notebook**

Corrected an issue where running 4-term searches in quotation marks caused the application to become non-responsive.

**Unable to import a LEF file made with LiveNote Central online LEF Maker**

Corrected an issue where LEF files made with LiveNote Central online LEF Maker could not be imported into Case Notebook.

*The following are known issues for Case Notebook 3.6:*

**Video performance through Citrix**

Transcripts with synchronized video experience a variety of playback problems on Citrix. Saved video clips from transcripts with synchronized video experience a variety of playback problems on Citrix.

**Formatting issues resulting from full-document OCR conversions for certain documents types**

Full-document OCR conversions through Drafting Assistant for documents with certain formatting (eg. tables, multiple columns, line numbering, text boxes) can result in improper text conversions in the resulting document.

**Cannot send MPEG-2 video clips to PowerPoint**

"PowerPoint cannot insert a video from the selected file" error when inserting an MPEG-2 video into a PowerPoint 2013 or 2010 presentation.

**Cannot import transcript designations from PCF files**

Designations do not import when importing PCF files.

**Sending video to TrialDirector does not work on Windows 8**

Case Notebook supports versions of Trial Director which are not compatible with Windows 8. Sending annotations to TrialDirector will not work on Windows 8.

**Sending video to PowerPoint not functional without "Office Shared Features" installed from Microsoft Office**

Transcript text with synchronized video cannot be sent to PowerPoint unless the "Office Shared Features" option in Microsoft Office is installed.

**Overlapping Designation Note text in transcript footer in Print Preview**

Designation Note text can sometimes overlap the page:line range in the transcript footer when viewing in Print Preview (no impact to print output).

## Case Notebook 3.5.1 – Release information for September 2013

*The following improvements correct known issues from earlier versions:*

### **Saving Transcript Annotations Files**

Corrected issue which caused Transcript Annotations Files to list incorrect page numbers and Issue names.

### **Importing Transcript Annotations Files**

Corrected issue which caused Case Notebook to create Annotations on incorrect pages when importing from a custom-created CSV file.

### **Blank End Position Field in Transcript Annotations Files**

Changed behavior of Transcript Annotations Files so that a blank 'End Position' field in a CSV file will mark the transcript through the end of the selected line.

### **RAS Connection Changes**

Prevent certain RAS connection errors by not allowing Case Notebook to connect to any older version of RAS.

### **Importing Lextranet Load Files**

Corrected issue which caused errors when importing Lextranet load files.

### **Opening Annotations Folder in Navigation Pane**

Corrected issue which caused slowness in opening Annotations folder in Navigation Pane for certain large image files.

### **Send to Realtime Chat**

Corrected issue which caused Send to Realtime Chat to fail to send the text to chat.

### **Importing Older RealLegal Binder Projects**

Corrected issue which caused errors with transcript dates when importing older RealLegal Binder projects that have a date associated with the time.

### **Issues Report**

Corrected issue which caused Issues Reports to omit data when choosing a subset of all available documents.

### **Word Index Display when Importing through RAS**

Corrected issue which caused the display of an empty Word Index when importing long text files and OCR'ed image files through a RAS connection.

## Westlaw Case Notebook 3.5 – Release information for May 2013

*The Westlaw Case Notebook release includes the following enhancements:*

### **OCR Text Delivery**

Image converted to text using Case Notebook's Optical Character Recognition (OCR) technology can be delivered directly to the word processor. Converted OCR text from Case Notebook documents can also be delivered to work product via the Case Notebook integration with Westlaw Drafting Assistant.

### **Portal**

The Case Notebook Portal component facilitates building of custom web parts into matter-centric intranet pages, allowing intranet users to view lists of Case Notebook matter-centric information and open the full text of the Case Notebook materials in the desktop client.

### **Batch Transcript Annotation Import (Designations)**

Import CSV files containing annotations or designations from opposing counsel. Imported data becomes Transcript Annotations in Case Notebook. Transcript annotations can also be exported to a CSV file from Case Notebook to provide to opposing counsel or other Case Notebook users.

### **Save Documents List as CSV**

Save Documents grid to a CSV file for creating exhibit lists or advanced sorting and filtering.

### **Search Highlighting**

Customize search highlighting color and choose default color.

### **Updated SQL Express**

Case Notebook now installs SQL Server Express 2008.

### **OCR Options**

New OCR processing options to improve handling of low resolution images, rotated pages.

### **Default Settings for Issues Reports**

All issues and options are deselected by default when first opening the Issues Report dialog.



*The following improvements correct known issues from earlier versions:*

#### **Autotags Report**

Changed the way hits are displayed when Autotag consists of a multiple words in quotes.

#### **Updating Linked Transcripts with Publisher Bundles**

Corrected issue which caused links to exhibits in a transcript to break when updating the transcript with a Publisher bundle.

#### **Updating Linked Transcripts with LEF Files**

Corrected issue which caused duplicate exhibit links to be created when updating a transcript with a LEF file.

#### **Character Recognition in Repository Cases**

Corrected issue which caused a system failure when a user attempts to open a document in a repository case while another user uses the Character Recognition tool in the same case.

#### **Quick Mark Display in Printed Transcripts**

Corrected issue which prevented Quick Marks from displaying in printed transcript even if *Include Quick Marks* option is selected.

*The following are known issues for Case Notebook 3.5:*

#### **Small Business Server Compatibility**

2003 Small Business server 32-bit and 2008 R2 Small Business server 64-bit do not support the installation of SQL Server Express 2008.

## Westlaw Case Notebook 3.0.1 – Release information for August 2012

*The Westlaw Case Notebook release includes the following enhancements:*

### **French Canadian Operating System Support**

Westlaw Case Notebook supports installation on French Canadian language versions of Windows 7, Vista and XP operating systems.

*The following improvements correct known issues from earlier versions:*

### **Transcript Dates Changed During Legacy LiveNote Upgrade**

Corrected an issue which caused incorrect Transcript dates to transfer to Case Notebook 3.0, when upgrading from legacy versions of LiveNote software.

### **LiveNote Realtime Refresh**

Corrected text transcription issues with the LiveNote Realtime refresh feature, which was implemented in Case Notebook version 3.0.

## Westlaw Case Notebook 3.0 – Release information for April 2012

*The Westlaw Case Notebook release includes the following enhancements:*

### **Westlaw CaseLogistix Integration**

Send to Westlaw Case Notebook from Westlaw CaseLogistix delivers additional work product and metadata properties, including Tags, Intellifolders, Notes, Redacted text locations, Date Sent, Date Received, Date Created, Date Accessed, Date Modified, Date Printed and Custodian.

### **WestlawNext Integration**

Send to Westlaw Case Notebook from WestlawNext delivers additional work product added in WestlawNext as text highlights, notes pertaining to highlighted text and notes pertaining to the entire document. Exporting this information to Case Notebook allows access to the work product added to WestlawNext research with a click of a button.

### **Data Groups Sub-categories**

Case Notebook supports sub-categories for Data Groups (folders), allowing support of imported Intellifolders from Westlaw CaseLogistix and offers new options familiar to Microsoft Outlook users.

### **Data Properties Overview**

View all Properties of Transcripts, Documents, Pleadings and Research on an Overview tab, with links to view and edit existing Properties on their respective tabs.

### **Document Properties List**

View Document Properties in a tabular list, allowing flexible sorting options and multi-selection and deletion options.

### **Realtime Rapid Refresh**

The court reporter can make updates to the text of the Transcript during breaks in a Realtime deposition and the attorney will see the updates in Realtime and in the rough draft at the end of the Realtime session.

### **LiveNote Local Stream**

The court reporter can broadcast LiveNote Realtime Stream on a local area network at deposition location, without need for a serial connection cable or an internet connection.

### **Batch Print Options**

New batch print option allows printing of the linked Exhibits in the same print request with the Transcript.

### **Sorting for Reports**

New sorting options for the following reports: Issues, All Annotations, Characters, Transcript Summaries & Quick Marks.

### **Reports Display Options**

New display options for Reports include the option to display data Properties in the Report result.

### **Header and Footer on Printouts**

Display descriptive information about a Transcript (e.g. deponent name, deposition date) in the header and footer of each page for easy identification of printouts of selected Transcript pages.

### **Issues Sub-folder in Navigation Pane**

Annotations can be viewed in folder categories in the left Navigation Pane, using the new option found in View > Display Options.

### **Case Summary**

A new option found in File > Case Properties displays a summary of the case contents, including the number of Transcripts, Documents, Pleadings and Research in the case.

### **Administration Search Index Rebuild**

The administrator can rebuild the search index for a secure Case Notebook case as a background process during the repository upgrade.

### **Supported Platforms**

In Terminal Server mode, Case Notebook will run on Windows Server 2008 R2 and Windows Server 2008 R2 SP1 for Citrix XenApp version 6.

### **Branding Updates**

New product icons and branding standardize display of the product name to Westlaw Case Notebook.

### **OCR Engine Upgrade**

Upgrade the built-in Optical Character Recognition (OCR) technology to the latest version.

*The following improvements correct known issues from earlier versions:*

### **Transfer to PowerPoint**

Improved display issues when sending certain annotation to PowerPoint.

### **Full Text Search**

Improved slow Full Text Search performance with certain types of quotation search operator and near operator searches.

### **Rebuild Character Smart Tags**

Corrected error when trying to use the Tools > Advanced > Rebuild Character Smart Tags...using a Citrix client.

### **Annotation Display on Printouts**

Corrected error printing Documents with Annotations displayed in the footer to correctly display the annotation information on the same page as the annotated passage of text.

### **Realtime Transcript Format after Disconnection**

Corrected behavior which caused a Transcript formatted for a number other than 25 lines per page to be re-formatted to 25 lines per page, after disconnection from Realtime session.

### **Annotations of Single Alpha-Numeric Characters**

Corrected issue which did not allow users to open or access the right-click menu for annotations of single alpha-numeric characters.

### **Printing Individual Transcript Pages with Annotations**

Corrected issue which caused the incorrect pages of Transcripts to print when annotations are added to the footer and individual pages are selected for printing.

### **Full Text Search using Accent Marks**

Corrected issue which did not return Full Text Search results when searching native text containing accented words, using search characters which also contain the same accent marks.

### **Upgrading Repository User Transfer**

When performing a Repository upgrade from legacy LiveNote 10 to Case Notebook 3.0, group users from the LiveNote 10 case are no longer incorrectly added as individual users to the Case Notebook case. Note, this issue will still occur if attempting to upgrade from legacy LiveNote 10 to Case Notebook 1.6 or 2.6.

### **Auto Tag Character Limitation**

Corrected issue which caused an incorrect limitation on the number of alpha-numeric characters which can be marked as an Auto Tag.

### **Sorting Data in Left Navigation Pane**

Corrected issue which caused a system failure when sorting a Document, Pleading or Research item, when only one item exists in the case.

*The following are known issues for Case Notebook 3.0:*

**Microsoft Office 2010 64-Bit Compatibility**

The Case Notebook integration with Drafting Assistant will not be available in the Microsoft Word interface for the Office 2010 64-bit version. The workaround for Drafting Assistant users, with Case Notebook, will be use of the full desktop Case Notebook client.

## West Case Notebook 2.6 – Release information for September 2011

*The West Case Notebook release includes the following enhancements:*

### **Sorting Options**

Sort Full Text Searches, Full Text Search Reports & Auto Tag Reports by Number of Hits, Date, Reverse Date and Title.

### **Legacy LiveNote Repository Upgrade Improvements**

Legacy LiveNote Repository upgrade process is streamlined with enhancements to the Administration software.

### **Play Video and Edit Video Clip Updates**

Right-click anywhere in a video-synchronized transcript and select Play Video. Edit the start and end point of annotated video clips.

### **Attachments**

Attachment locations will display an icon in the left margin of Transcripts.

### **Add to Data Groups**

Categorize data sent from Outlook & CaseLogistix into Data Groups.

### **Annotation Changes Offline**

Change and delete annotations (with proper user rights) while replicated offline.

### **Copy with Page & Line Citation**

Copy with Page & Line for Transcript text also delivers a citation to the passage.

### **Online Lessons**

Access free online training via the "Online Lessons" option in the Help menu.

*The following improvements correct known issues from earlier versions:*

### **CaseMap Links**

Convert links sent to CaseMap from legacy LiveNote versions 8.3, 9 & 10 to ensure working links back to West LiveNote/Case Notebook.

### **Reports for Drafting Assistant**

Corrected linking issues in the Key Facts Report created for Drafting Assistant.

### **Full Text Search Wildcard**

Corrected search issues related to the character wildcard (\*).

**Print Dialog Window**

Corrected the Print dialog window display slowness for Reports with video.

**Data Groups Display Performance**

Data Groups performance improved when editing certain Groups data.

**Realtime Word Indexing**

Corrected errors with Realtime word index if connecting an existing transcript.

**OCR and PDF Documents**

Updated process for recognizing borders between image and text in PDF files.

**Outlook 2010 Send to Case Notebook Integration**

Updated Send to Case Notebook from Outlook 2010 to correct set up error occurring in limited circumstances.



## West Case Notebook 2.5 – Release information for March 2011

*The West Case Notebook release includes the following enhancements:*

### **Enhanced Performance**

Improved system performance and increased capacity.

### **Support for Office 2010**

West Case Notebook 2.5 supports Microsoft Office 2010.

### **Print from Display Pane**

Print and Print Preview options available on the display pane toolbar.

### **Send as Research**

Send data to the West Case Notebook “Research” category from Windows Explorer.

### **Load Files Support for Groups**

Add batches of information to Data Groups while importing Load Files or multiple files.

### **Export Key Facts to CSV**

Improved display for Key Facts saved as .CSV.

### **Spell Check all of a Transcript’s Summaries**

Spell check all Transcript Summary items.

### **iManage DMS DeskSite and FileSite Integration**

West Case Notebook iCommand allows users to send data to Case Notebook from iManage DeskSite and FileSite.

*The following improvements correct known issues from earlier versions:*

### **CaseMap Links**

Send to CaseMap creates a working link back to West Case Notebook 2.5.

### **Full Text Search Results**

The Full Text Search Results list does not collapse after making an annotation.

### **Full Text Search Data Selections**

Data selections for Full Text Search carry over to Full Text Search Report.

### **Remote Access Server (RAS)**

Corrected issues which occurred under specific circumstances when multiple users accessed Remote Access Server (RAS).

### **OCR File Replication**

Corrected issues related to replication of OCR files.

### **LEF Files**

Corrected handling of LEF files with four character file extensions.

## West Case Notebook 2.1 – Release information for October 2010

Below is a list of some minor new features and bug fixes in West Case Notebook v2.1. The primary purpose of v2.1 is to integrate with Westlaw Drafting Assistant – allowing you to bring West Case Notebook case files into a word processor (Word and WordPerfect).

### Updated Gil Bower Demo Case Materials

Enhancements to the demo case make it easier to work with Transcript Summaries and Key Facts.

- All Transcript Summaries removed for the Transcript of the “Cynthia Roth” deposition, leaving space to create new Transcript Summary items.
- Removed the last Transcript Summary entry for each deposition Transcript, leaving space to create new Transcript Summary items.
- Deposition Transcript annotations added as sources for some Key Facts.

*The following improvements correct known issues from earlier versions:*

### Annotation Highlights and Notes in Reports

Corrected display issues with annotation highlights and notes occurring in some reports.

### Changed User Name when Case Offline

Corrected issues related to logging into an offline database if the user name is changed in West LiveNote Administration while the user is offline.

### Selective Replication of Data Groups and Outlines

Corrected issues related to selective replication of data groups and outlines.

### PowerPoint Integration

Corrected issues related to sending information to PowerPoint from some Reports and Key Facts.

### Character Recognition

Improvements to the Character recognition processing and accuracy.

### Annotation Note, Full Text Search, Right-click Options

Full right-click menu options are displayed when right-clicking the Annotation Note hit within a full text search result list.

### Annotation Full Text Search, Annotation Dialog

The annotation property dialog opens, allowing editing of the annotation, when clicking an Annotation Note hit within a full text search result list.

### **Transcript Summary**

No longer able to change the first page/line of an existing Transcript Summary item to be in a range of another existing transcript summary item.

### **OCR and PDF Documents**

Updated process to better recognize existing OCR from Adobe PDF documents.

## West Case Notebook 2.0 – Release information for August 2010

*The West Case Notebook release includes the following enhancements:*

### Folder options

- Folder display in the left-hand navigation pane.
- Use Data Groups to organize display.
- Organize display in navigation pane by data properties.

### Characters

- Import Characters in batch from Microsoft Outlook Contacts.
- Identify Person and Company names in West Case Notebook data during indexing.
- Generate Character reports from the automatically tagged names.

### Selective Replication

You can select specific documents for use in an off-line mode.

### Remote Access Server (RAS)

- West Case Notebook 2.1 desktop application can remotely access centralized West Case Notebook Repository data via HTTP or HTTPS.
- RAS uses a set of components running on IIS T that act as a web service to communicate with Repository.

### Outlines

- Insert links to exhibits in the Outline.
- One print window for the Outline, annotated work-product copies of the exhibits and sets of original exhibits for distribution.
- A basic word processor to create outlines of witness examination questions and topics.

### Transcript Summary Tool

- Built-in Transcript Summary tool allows you to summarize depositions without switching between applications.
- Create and save a useful pre-formatted Transcript Summary report.

### Print Word Index

Transcript printing and page setup options now allow you to append and print the word index for full-sized and condensed Transcripts. The word index prints at the end of the printed Transcript.

### Indexing and OCR in Background

The search index is built in the background, allowing you to keep working while the build/rebuild takes place.

### **Sub-Issues**

Create numbered subcategories for Issue highlighting.

### **Send to Word**

File name and page references are now included for Documents, Pleadings and non-Westlaw Research. This feature makes it easier to cite to Exhibits and Pleadings in drafting projects.

### **OCR Processing Error Handling**

If you import multiple image documents and an OCR processing error occurs on one or more of those images, West Case Notebook silently skip the file with the OCR error until the entire process has completed. After the OCR process completes, a dialog lists all of the skipped documents that could not be OCR'd. You have the option to copy the list to a clipboard for further review of the underlying data. The items with OCR errors do not have a check box in the OCR status list.

### **Single Character Indexing**

West Case Notebook can index single alpha-numeric characters.

### **Create Characters from CSV**

West Case Notebook can import CSV files created from exporting contacts in Microsoft Outlook, as well as custom CSV files created with the same formatting as the Outlook export format.

### **Data Selection List Sorting**

The data tab selection lists for Reports, Search and so forth is now displayed in columns that you can sort by Title and Date.

### **Adding to Data Groups**

Add items to a Data Group using the context menus available for data listed in left navigation pane.

### **Linked Exhibits Display Order**

Exhibits are linked in the order of their appearance in the transcript, in the left navigation pane.

### **OCR Upgrade**

The ABBYY OCR engine has been upgraded to latest SDK. The latest versions increase processing speed and accuracy.

### **Key Facts Report**

Key Facts Report allows you to create a summary report of some or all of the Key Facts of the case.

### **Send Key Facts**

The option to Send Key Facts to Word and WordPerfect allows you to select one or more Key Facts and send them directly to their drafting project.

### **Case Reports**

Case Reports allow the selection of individual Key Facts.

### **OCR Information Imported**

When PDF imports contain embedded OCR data that West Case Notebook can recognize, the import procedure does not re-OCR the data; in other words, the import is faster.

### **Update KeyCite Flags**

- Update KeyCite Flags menu option is now under the Tools dropdown.
- The login for the Update KeyCite Flags process allows you to enter OnePass information.

### **Foreign Character support**

Support for Latin-based foreign language characters in serial Realtime and data properties.

### **Support for Additional Systems**

West LiveNote Repository will support SQL Server 2005 or SQL Server 2008 if a named instance (for example, WESTLIVENOTE) exists on the server.

*The following improvements correct known issues from earlier versions:*

### **Support for Additional File Formats**

West Case Notebook supports JPEG2000 or JBIG2 images embedded in PDFs.

### **Pausing Realtime**

Clicking a paused Transcript does not cause the Transcript to continue scrolling; the Transcript remains paused.

### **Installation**

The West Case Notebook installer detects the current operating system and stops the installation when the operating system is not supported.

### **LEF Files from Publisher 5.x**

Corrected errors with native file formatted Documents importing from a LEF file created with Publisher 5.X.

**LEF Files with Linked TIFF Exhibits**

Corrected errors with LEF files retaining \*.tiff file format linked Exhibits.

**Transcripts with More Than 85 Characters in a Line**

Corrected import processing of Transcripts with more than 85 characters in a single line.

**Westlaw Research Data and Word Index**

Corrected Word Index processing for certain Westlaw research data which previously caused the system to hang up.