

# LiveNote Stream Manager Quick Reference Guide

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This guide provides an overview of LiveNote™ Stream Manager™ and describes how to set up a LiveNote Stream Manager session. For information on installing LiveNote Stream Manager, download a free copy of the *LiveNote Stream Manager Installation Guide* at <http://legalsolutions.thomsonreuters.com/law-products/c/LiveNote-Stream-Manager-Installation-Guide/p/990001276>.

For assistance using LiveNote Stream Manager call 1-800-290-9378 or e-mail [westlaw\\_software.support@thomsonreuters.com](mailto:westlaw_software.support@thomsonreuters.com).

For free reference materials, visit [store.westlaw.com/westlaw/guides](http://store.westlaw.com/westlaw/guides).

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## Introduction

### OVERVIEW OF LIVENOTE STREAM MANAGER

LiveNote Stream Manager enables you to transmit live deposition transcripts. Transmitting a live transcript is referred to as streaming. LiveNote Stream Manager streams transcripts to Westlaw Case Notebook and Westlaw Case Notebook (Transcripts), both referred to in this guide as Case Notebook.

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

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

LiveNote Stream Manager allows you to conduct two types of sessions, either simultaneously or separately:

- **Global Stream**—The transcript is streamed to Case Notebook through the Internet. To conduct a Global Stream session, you must schedule it at LiveNote Stream or LiveNote Central. See “Scheduling a LiveNote Stream Manager Session” below.
- **Local Stream**—The transcript is streamed to Case Notebook through a local area network (LAN). You can start a Local Stream session at any time. You do not need to coordinate the session with anyone at Thomson Reuters or schedule a session at LiveNote Central. For further information, see “Starting a Local Stream Session” on page 8.

## Starting a Global Stream Session

To start a Global Stream session, you must

- have a LiveNote Central account; if you do not have an account, you can send an e-mail to [support@livenote.com](mailto:support@livenote.com) to request one.
- schedule a session for LiveNote Stream Manager.
- access the session you want to conduct.
- configure LiveNote Stream Manager to be compatible with your computer-aided transcription (CAT) system.

## SCHEDULING A GLOBAL STREAM SESSION

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

### Scheduling a Session at the LiveNote Stream Website

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

1. Go to [stream.livenote.com](http://stream.livenote.com). The LiveNote Stream home page is displayed (Figure 1).

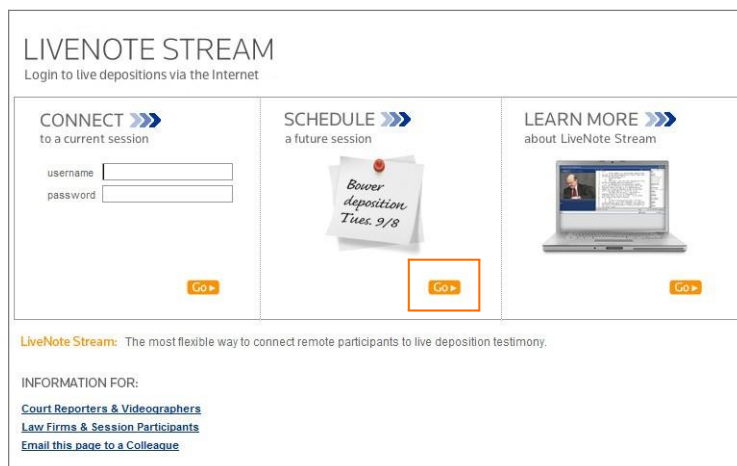


Figure 1. LiveNote Stream home page

2. In the Schedule a Future Session section, click **Go**. The Schedule Transcript Stream Event page is displayed.

3. Complete the form as appropriate, considering the following information:
  - **Video streaming:** If you intend to stream live video from the deposition, you must click Yes next to Video Streaming? under Event Details.
  - **Email addresses and video:** You must type an email address for each person attending the deposition. If you do not enter an email address, that person will not have access to the session. Additionally, if live video is part of the session, you must select the Video check box for each person who wants to view the video.
  - **Instant messaging group:** When you assign individuals to instant messaging groups, it is recommended that you assign opposing parties to different groups.
4. Click **Submit**. The form is submitted to LiveNote.

### Scheduling a Session at LiveNote Central

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

1. Go to [www.livenotecentral.com](http://www.livenotecentral.com). The **Login** page is displayed (Figure 2).

Figure 2. Login page

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

Figure 3. New Session page

4. Type your information in the appropriate text boxes.

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

Figure 4. New Session–Add Groups page

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

Figure 5. Add Participants dialog box

8. Type the email address or LiveNote Central user ID for each participant, separated with a comma or semi-colon, in the box.
9. Select the check boxes next to **Realtime**, **Chat**, and **Video**, if available, for the services you want the participants to access.
10. Click **OK**. The participants are listed under the group.
11. Repeat steps 7–10 to add participants to other groups.

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

**Notes:**

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

**ACCESSING THE SESSION**

To access the session you want to conduct, complete these steps:

1. Double-click the **LiveNote Stream Manager** icon (📁) that was installed on your desktop. The LiveNote Server Options dialog box is displayed.

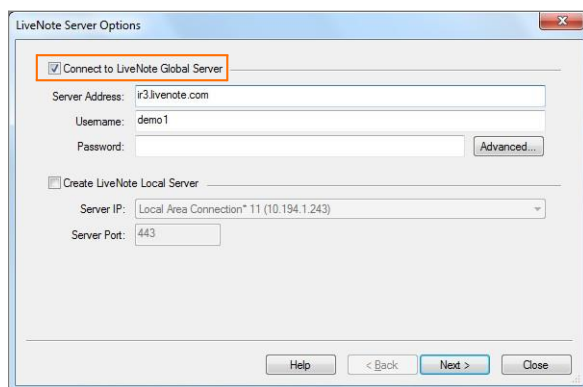


Figure 6. LiveNote Server Options dialog box

2. By default, the **Connect to LiveNote Global Server** check box is selected.
3. Type your username and password in the appropriate boxes.
4. Click **Next**. The Select Session dialog box is displayed.
5. Click the session you want to join and click **Next**. The Realtime Options dialog box is displayed (Figure 7).

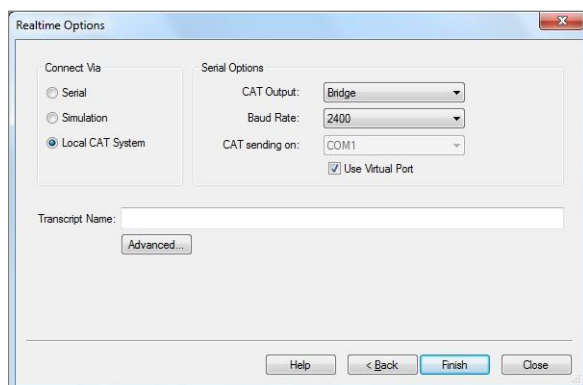


Figure 7. Realtime Options dialog box

## CONFIGURING LIVENOTE STREAM MANAGER

- **Virtual port:** For LiveNote Stream Manager and the CAT system to communicate via virtual ports, you must access LiveNote Stream Manager and set the options below before starting the CAT system software.
  - **Make a note of the port:** When you select a port in the procedure below, write down the name of the port. Then, after you configure LiveNote Stream Manager, you enter the same port in the CAT system.
1. Set the following options:
    - **Serial:** Click this option if the CAT system is on one computer, LiveNote Stream Manager is on a different computer, and you are connecting these computers with a serial connection.
    - **Simulation:** Click this option to view the simulation feed.
    - **Local CAT System:** Click this option if the CAT system and LiveNote Stream Manager are on the same computer. Note that when you click this option, the Use Virtual Port check box is displayed. As mentioned previously, you must configure this setting before you start the CAT system and before you define the output port for the CAT software.
      - **Use Virtual Port:** Select this check box if the CAT system and LiveNote Stream Manager are installed on the same computer and you are not using a serial connection at the deposition, e.g., you are not connected to a computer with Case Notebook via a serial port. In some cases, even if the Case Notebook computer is in the same room, you may find it easier to connect via LiveNote Stream™ instead of using a serial connection. As mentioned previously, you must configure this setting before you start the CAT system and before you define the output port for the CAT software.
    - **CAT Output:** If you use CaseView, click CaseView in the list. If you use an output type other than CaseView, click ASCII Wrap.
    - **Baud Rate:** The most common baud rate is 2400. Refer to the CAT system's operating instructions for the appropriate setting.
    - **Serial Port or CAT Sending On:**
      - If you clicked **Serial**, Serial Port is displayed; click the serial port sending information to the CAT system.
      - If you clicked **Local CAT System**, CAT Sending On and the Use Virtual Port check box are displayed. Select the **Use Virtual Port** check box if Case Notebook is not on a computer in the same room receiving the stream, e.g., if you are streaming to Case Notebook off site. Whichever port you click, make a note of the number. You will need to enter the number when setting up the CAT system. If you select the Use Virtual Port check box, then the number is gray, but you will still need to enter the number in the CAT system as the output port.
    - **Transcript Name:** Type the name for the transcript.
  2. Click **Advanced**, if desired. The Advanced Options dialog box is displayed (Figure 8).

**Note:** Click this option if the session participants are using an older version of LiveNote. See the information under Page Options in the dialog box.

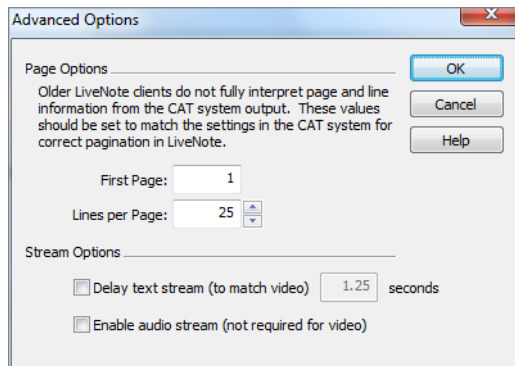


Figure 8. Advanced Options dialog box

Set the following options:

- **First Page:** Type the number of the first page of the transcript.
  - **Lines Per Page:** Type the number of lines per page in the transcript or click the arrows to set the page number.
  - **Delay text stream (to match video):** Select this check box if you have streaming video with the transcript and you want to slow down the text stream to keep it in sync with the video stream. You may need to experiment with this feature. For example, before the deposition begins, set the buffer at three seconds, ask a receiver of the stream to watch the stream, turn on the video, have someone speak, and type what the person is saying. Ask the receiver of the stream if the text is in sync with the person speaking. You can adjust the buffer up to 30 seconds. You can return at any time and adjust this option.
  - **Enable audio stream (not required for video):** Select this check box if you have streaming audio but not video for the deposition. It is not necessary to select this check box when you have streaming video. Video includes the audio automatically.
3. Click **OK** in the Advanced Options dialog box.
  4. Click **Finish** in the Realtime Options dialog box.

### Defining the Output Port in the CAT System

When setting up the CAT system

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

### USING REALTIME REFRESH

You can use the Bridge feature to refresh the real-time transcript when you make any corrections or changes during a session. To use the Bridge feature, complete these steps:

1. In the Realtime Options dialog box (Figure 7), in the **CAT Output** list, click **Bridge**.
2. To start the session immediately, click **Finish**.
3. To save the information and start the session at a later time, click **Close**.

## Starting a Local Stream Session

To start a Local Stream session using a LAN, you must:

- access LiveNote Stream Manager
- add participants for this session
- assign the participants to groups
- configure LiveNote Stream Manager to be compatible with your CAT system
- send the participants their passwords

To start a Local Stream session, complete these steps:

1. Access LiveNote Stream Manager by double-clicking the **LiveNote Stream Manager** icon  that was installed on your desktop. The LiveNote Server Options dialog box is displayed (Figure 9).

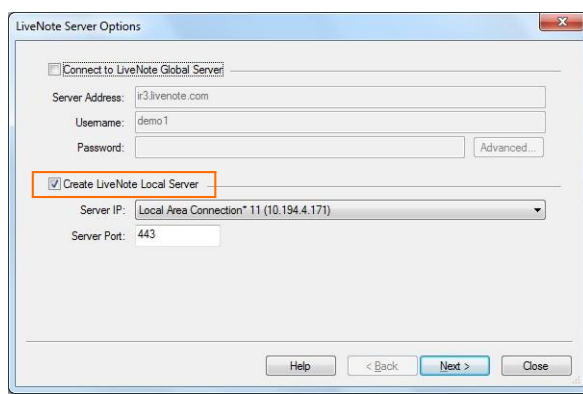


Figure 9. LiveNote Server Options dialog box

2. By default, the **Connect to LiveNote Global Server** check box is selected. Clear the **Connect to LiveNote Global Server** check box if you want to conduct only a Local Stream session. You can conduct a Global Stream session with a Local Stream session, if desired.
3. Select the **Create LiveNote Local Server** check box.
4. Click **Next**. The Select Local Groups dialog box is displayed (Figure 10).

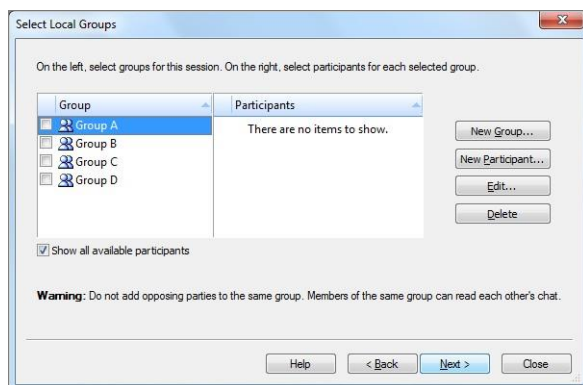


Figure 10. Select Local Groups dialog box

- Click **New Participant**. The New Participant dialog box is displayed (Figure 11).

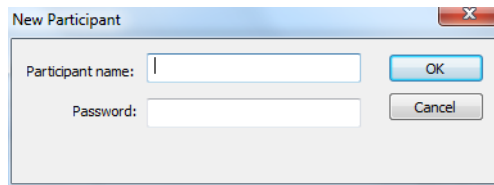


Figure 11. New Participant dialog box

- Type a name and password in the appropriate boxes and click **OK**. The Select Local Groups dialog box is redisplayed with the participant.  
**Note:** You must give the participants the passwords you create for them before the session.
- Repeat steps 5 and 6 for each participant you want to add to the session.  
**Note:** To change the name or password for a participant, in the Select Local Groups dialog box, click the participant name in the right pane, then click **Edit**. The Edit Participants dialog box is displayed. Change the appropriate information, then click **OK**.
- To add participants to a group, click the group name in the left pane, then select the check boxes next to the participants in the right pane you want to add to the group (Figure 12).



Figure 12. Group with participants

- Note:** By default, the groups are named for you, e.g., Group A. To change the name of a group, click the group name in the left pane, then click **Edit**. The Edit Group dialog box is displayed. Type a different name for the group in the **Group Name** box, then click **OK**.
- Repeat step 8 for each group for which you want to add participants.
- After you have finished adding the participants to their groups, select the check boxes next to the groups that will be participating in the session.  
**Note:** The dialog box allows you to set up sessions in advance. You can add participants and groups and save them for later use. Click **Close** to save the participants and groups.
- Click **Next**. The Realtime Options dialog box is displayed.
- Configure the options for your CAT system as described in "Configuring Manager" on page 6.

## Connection Scenarios

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

### SCENARIO 1: TESTING LIVENOTE STREAM MANAGER WITH A SIMULATION FILE

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

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

### SCENARIO 2: SERIAL CONNECTION AND GLOBAL STREAM CONNECTION

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

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

To establish the connections, complete these steps:

1. Access Stream Manager. The LiveNote Server Options dialog box is displayed.
2. By default, the **Connect to LiveNote Global Server** check box is selected.
3. Type your username and password in the appropriate boxes.
4. Click **Next**. The Select Session dialog box is displayed.
5. Click the session you want to join and click **Next**. (If you have not set up a session, see "Scheduling a Global Stream Session" on page 2.) The Realtime Options dialog box is displayed.
6. Click **Local CAT System**.
7. Clear the **Virtual Port** check box, if necessary.
8. In the **CAT sending on list**, click a serial port. Make a note of the serial port you select. The CAT software output serial port must match the CAT sending port.
9. In the **Transcript Name** box, type a name for the transcript.
10. Click **Finish**.
11. Connect the computer where the CAT software is installed to Attorney A's computer using serial cables and adaptors.
12. Instruct Attorney A to complete these steps:
  - Access Case Notebook.
  - Click the **New** arrow, then click **Realtime Transcript** on the menu to display the Connect to Realtime dialog box.
  - Click **Serial**.

- Click **Connect**.
13. Instruct Attorney B to complete these steps:
- Access Case Notebook.
  - Click the **New** arrow, then click **Realtime Transcript** on the menu to display the Connect to Realtime dialog box.
  - Click **LiveNote Stream**.
  - Click **Connect**.

**Notes:**

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

**SCENARIO 3: LOCAL STREAM CONNECTION AND GLOBAL STREAM CONNECTION**

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

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

To establish the connections, complete these steps:

1. Access Stream Manager. The LiveNote Server Options dialog box is displayed.
2. By default, the **Connect to LiveNote Global Server** check box is selected.
3. Select the **Create LiveNote Local Server** check box.
4. Type your username and password in the appropriate boxes.
5. Click **Next**. The Select Session dialog box is displayed.
6. Click the session you want to join and click **Next**. (If you have not set up a session, see "Scheduling a Global Stream Session" on page 2.) The Realtime Options dialog box is displayed.
7. Click **Local CAT System**.
8. Select the **Virtual Port** check box, if necessary.
9. In the **Transcript Name** box, type a name for the transcript.
10. Click **Finish**.
11. Instruct Attorney A to complete these steps:
  - Access Case Notebook.
  - Click the **New** arrow, then click **Realtime Transcript** on the menu to display the Connect to Realtime dialog box.
  - Click **LiveNote Local Stream**.
  - In the **Server IP** box, type the server IP address that you provide.

**Note:** To access the server IP address and port information, click the **Configuration** icon  on the LiveNote Stream Manager toolbar. The Local CAT System Options dialog box is displayed with the information. In the alternative, Attorney A can click **Find** to retrieve the server IP address once the session has started, if necessary.

- In the **Server Port** box, type the server port number.
  - Click **Connect**.
12. Instruct Attorney B to complete these steps:
- Access Case Notebook.
  - Click the **New** arrow, then click **Realtime Transcript** on the menu to display the Connect to Realtime dialog box.
  - Click **LiveNote Stream**.
  - Click **Connect**.

#### SCENARIO 4: GLOBAL STREAM CONNECTION ONLY

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

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

1. Access Stream Manager. The LiveNote Server Options dialog box is displayed.
2. By default, the **Connect to LiveNote Global Server** check box is selected.
3. Type your username and password in the appropriate boxes.
4. Click **Next**. The Select Session dialog box is displayed.
5. Click the session you want to join and click **Next**. (If you have not set up a session, see “Scheduling a Global Stream Session” on page 2.) The Realtime Options dialog box is displayed.
6. Click **Local CAT System**.
7. Select the **Virtual Port** check box.
8. In the **Transcript Name** box, type a name for the transcript.
9. Click **Finish**.

#### Notes:

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

## Slowing the Text Stream

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

1. Click the **Configuration** icon  on the LiveNote Stream Manager toolbar. The Local Cat System Options dialog box is displayed (Figure 13).

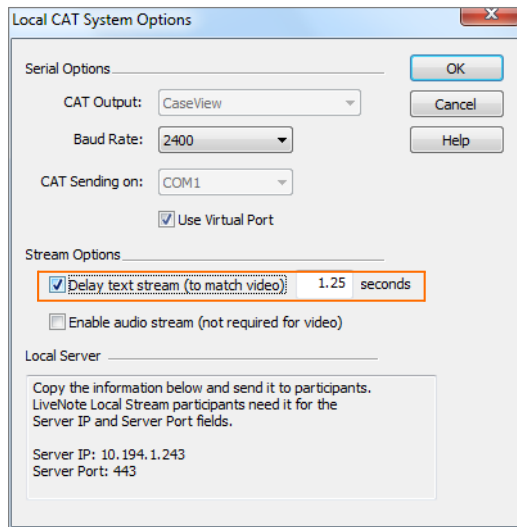


Figure 13. Local Cat System Options dialog box

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

