

Westlaw Case Notebook[®] v3

Quick Reference Card

Westlaw Case Notebook is an electronic organizer and discovery tool for saving and working with important documents, research and transcripts. With Westlaw Case Notebook, you and your team can enter and share key facts, insights, notes, documents, main characters, evidence, legal research and more.

Add Characters Manually

1. Click the **Characters** tab on the Navigation pane (left side).
2. Click the **New** button. The Character Properties dialog box appears. Fill in the blanks and click **OK**.

Add Characters from Smart Tags

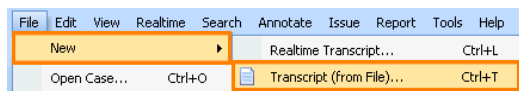
When you import transcripts, documents, or pleadings, Westlaw Case Notebook automatically identifies words that appear to be names of persons or companies. It then adds smart tags to them which are links to this information in the document. It also creates a smart tag list. Smart tags are displayed with a blue dotted underline. Right-click a smart tag to modify the info, delete the tag, create a character report or retrieve a character's profile on Westlaw.

Modify a Character's Details

1. Click the **Characters** tab on the Navigation pane (left side).
2. Right-click a character and select **Properties** from the menu. Modify the information in the Character Properties dialog box and click **OK**.

Import a Transcript

1. Click the **New** arrow, then click **Transcript (from File)** to display the Import Wizard–Transcript File dialog box.



2. Click **Browse** to display the Browse for Transcript Files dialog box, and then select a transcript to import.

Import a Document or Pleading

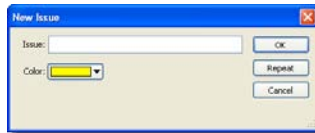
1. Click the **New** arrow, then click **Document (from File)** or **Pleading (from File)** to display the appropriate Data Import Wizard dialog box.
2. Click **Add**, then select a document in the Open dialog box and then click **Open**.

3. Click **Groups** to add the document or pleading to a group, and then click **OK**.
4. Click **Next**.
5. Enter your information into the appropriate boxes in the Properties dialog box and then click **Finish**.

Note: If you import multiple documents or pleadings, you must right-click each document or pleading in the left frame and click Properties in the menu to add related information.

Create an Issue (Ctrl+I)

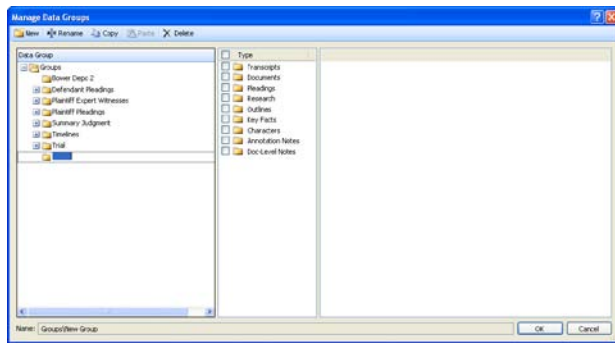
1. Click **Manage Issues** from the Issue menu to display the Manage Issues dialog box.
2. Click **New** to display the New Issue dialog box.



3. Enter a name for the issue into the **Issue** box, then select a color from the **Color** list and then click **OK**.

Create a Data Group

1. Click the **New** arrow, then click **Data Group** to display the Data Group Properties dialog box.



2. Enter a name for the data group into the Data Group box.
3. Click a data type in the centre pane, and then select the checkboxes for the data you want to include in the group or sub-group. If you select the checkbox for the data type, all data items are automatically selected.
4. Click **OK**.

Determine Data Group Assignments

Right-click a document, pleading, or research document and click **Groups** to display the Data Groups dialog box. A checked box indicates the data group to which the document is assigned.

Create a Key Fact (Ctrl+Y)

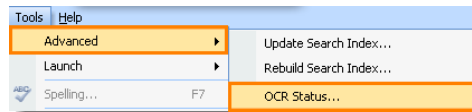
1. Click the **New** arrow and then click **Key Fact** to display the Key Fact Properties dialog box.
2. Enter your information into the boxes on the Details tab.
3. You can associate the key fact with issues, sources, and characters by clicking the appropriate tabs at the top of the dialog box and selecting the desired check boxes.
4. Click **OK**.

Process a Single Document with Optical Character Recognition (OCR)

1. Right-click the document in the left pane and click **Properties**.
2. Select the OCR check box and click **OK**.

Process Multiple Documents with OCR

1. Click **Advanced** and then click **OCR Status** on the Tools menu.



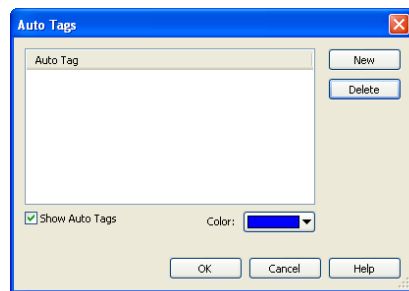
2. Select the documents you want to process with OCR in the OCR Status dialog box and then click **OK**.

Save a Transcript as an E-Transcript (PTX) File

1. Open a transcript.
2. Click **Save As, Transcript**, and then **Text Only** on the File menu.
3. Select **E-Transcript File (.ptx)** in the *Save as type* drop-down list and then click **Save**.

Create an Auto Tag

1. Click **Auto Tags** on the Annotate menu to display the Auto Tags dialog box.



2. Click **New** and enter a name for the Auto Tag.
3. Click **OK**.

Create Outlines

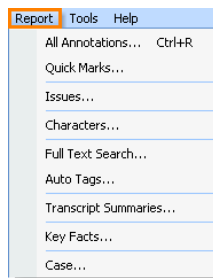
1. Click the **New** arrow and choose **Outline**.
2. Enter information into the Create New Outline dialog box and click **OK**.

Insert information into an Outline

- Potential Exhibits: From the outline, click the **Insert** button and select **Insert Potential Exhibits**.
- Transcript Questions: From the outline, click the **Insert** button and select **Insert Transcript Questions**.
- Text from a Document: From the document, click the **Copy** tool, highlight the text to copy and paste it into the outline.
- Westlaw Document: From the outline, click the **Insert** button and select **Insert Westlaw Outline**.
- A Report: From the report, click the **Send** button and select **Outline or Outline (Questions only)**.

Create Reports

Select a report type in the **Reports** menu.



Summary Report

1. Select **Transcript Summaries** from the Report button on the Main Menu.
2. Select the transcript on which you want to run the report.
3. Click **Groups** to include the data in a data group in your outline. Select the group you want to include in the outline and click **OK**.
4. Click the **Display** tab to view a list of display options. Enter a title for the report in the **Title** box, if desired. Select or clear the appropriate check boxes and click **OK**.

Notes Report

1. Create an Annotations Report.
2. Click the **Properties** button to display the All Annotations Report Properties dialog box.
3. Click the **Issues** tab, and then select the **Only include Annotations that contain Annotation notes or Doc-Level Notes** checkbox.
4. Click **OK**.

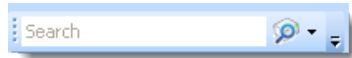
Attachments Report

1. Create an Annotations Report.
2. Click the **Properties** button to display the All Annotations Report Properties dialog box.
3. Click the **Issues** tab and clear the **Include Quick Marks** check box.
4. Click **OK**.

Discovery Preparation Report

1. Create a Characters Report.
2. Click the **Properties** button to display the Characters Report Properties dialog box.
3. Click the **Display** tab and select all the check boxes.
4. Click the **Context** tab, then select **QA Pairs (where available)** and a number.
5. Click **OK**.

Full Text Search Connectors and Expanders



root expander (!)	Use the root expander to retrieve words with variant endings.
universal character (*)	Use the universal character to represent one variable character.

Enter:	To search for documents that contain:
& (AND)	both terms
a space (OR)	either term or both terms
/n	terms within n terms of each other (where n is a number)
+n	the first term preceding the second by n terms (where n is a number)
" "	terms appearing in the same order as in the quotation marks
Type	To exclude documents that contain
% (BUT NOT)	the terms following the percent symbol