THOMSON REUTERS

Case Notebook Quick Reference Card

You can print this card in Landscape view on 8.5" x 14" paper.

Import a Transcript, Document, or Pleading

1. Click the drop-down arrow next to the **Create New** button on the **Home** menu and select **Transcript (from File)**, **Document (from File)**, or **Pleading (from File)**.
2. Click **Browse** to select your file for import. To browse for a particular file type, click the **Files of type** drop-down at the bottom of the dialog and select the import file type.
3. Optionally, click **Groups** to add the transcripts to a data group.
4. Click **Next** to enter the file properties.
5. Click **Finish**. The document is listed in the appropriate category in the Navigation Pane.

Create an Issue (Ctrl+I)

1. Click the **Manage Issues** button on the **Top Issues** pane.
2. Click **New**, type a name for the issue, and select a color from the field provided. Click the **Repeat** button in the New Issue dialog to quickly create multiple issues with similar issue names. When creating new issues, ensure you do not duplicate previous issues.

Create a Data Group

Create groups and save selected data to those groups to organize data into categories.

1. Click the **Tools** menu and select **Manage Data Groups**.
2. Place your cursor at the level you wish to create the new group, then click the **New** button on the toolbar. Type a name for the data group (for example, "plaintiff expert witnesses") and hit **Enter** on the keyboard. The group is selected.
3. Select the case data you wish to add to or remove from the group. The **Type** column displays data grouped by type. Selecting a data type from this column selects and displays the related content in the last column.
4. When you have added the content to your data group, click **OK** to save the group.

DETERMINE DATA GROUP ASSIGNMENTS

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

Create a Key Fact (Ctrl+Y)

1. Click the drop-down arrow next to the **Key Fact** button on the **New** menu and select **Key Fact**.
2. Type the details for the key fact on the Details tab.
3. Optionally, click the **Issues** tab to assign issues to the key fact; click the **Sources** tab to associate defined full-text sources or annotation sources with the key fact, and click the **Characters** tab to associate defined characters with the key fact.
4. Click **OK**.

Batch Import Key Facts

You can also batch import key facts from a .csv file.

1. Click the drop-down arrow next to the **Key Fact** button on the **New** menu and select **Key Fact (from File)**.
2. Browse to the .csv file.
3. Click **Next**.
4. Review the key facts you are adding to the case. If the first row of the .csv file contains field names, select the **First row contains field names** option to map the data to existing properties for key facts. This option should only be selected if the first row contains headings, not data. You may also map columns to properties manually.
5. Click **Finish**.

Create Custom Properties

Retain and sort information contained in metadata, fields, and tags in files that are imported from another software application or external users.

1. Click the **Tools** menu and select **Manage Custom Properties**.
2. Click the **New** button.
3. Type a name for the property in the box provided.
4. Select a type for the property. Available types **include Date, Date & Time, Editable List, Fixed List, Number (Currency), Number (Decimal), Number (Integer), Text (256 character limit),** and **Text (Advanced)**.
5. In **Data** options, select the types of files where this custom property displays. The custom property is available to assign in the properties on the **Details** tab for all files of that type.

Edit and Delete Custom Properties

Select a custom property from the list and click **Edit** to edit the name, list entries, or data types for that property. Editing a value modifies that value in all files where it was applied in the properties.

Select a custom property from the list and click **Delete** to delete that custom property. Deleting a value warns you if that value has been applied to any files and, if delete is confirmed removes the value from those files.

Process Data with Optical Character Recognition (OCR)

A list of data that has been converted using OCR can be accessed via the **Tools** menu, **Advanced**, **OCR Status** option. A check mark is displayed next to content that has been through the OCR process. Select the check box to process the content using OCR or clear the check box to remove OCR text for that content from the Word Index.

Save a Transcript

Save a transcript as Amicable, Page Image (includes three options), Summation (includes options for page breaks), or Custom text file.

1. Click the drop-down arrow next to the **Save As** button on the **Home** menu, point to **Transcript**, and select **Text Only**.
2. Browse for a location to save the file.
3. Type a name for the file in the **File Name** field.
4. Select a file type from the **Save as type** drop-down list. Select to save as:
   - **Text File (.txt)**: saves text of the transcript only.
   - **E-Transcript XML (.xml)**: saves transcripts with synchronized video.
   - **E-Transcript File (.ptx)**: saves transcripts in format compatible with E-Transcript Manager and Bundle Viewer.

To download the free E-Transcript Bundle Viewer, visit https://legal.thomsonreuters.com/en/support/software-downloads/reallegal/e-transcript-bundle-viewer

Create Reports

To generate a report, click the **Report** menu and select a report type. Report types you can create in Case Notebook include:

- **All Annotations**: List all of the annotations in the case for the content you specify or create Verbatim Summary reports, Notes reports, or Attachments reports.
- **Issues**: List all of the annotations in the case for the content you specify, sorted by issue.
- **Full Text Search**: List all occurrences of a search term or phrase for the content you specify.
- **Designation Lists**: List all of the designations in the case for the transcripts you specify.
- **Key Facts**: List all or a selected subset of key facts defined in a case.
- **Case**: List all files, key facts, and characters in a case.

Create Outlines

Create outlines to organize information in one place such as task sheets, pleading indexes, pattern depositions, or to prepare for events such as trials, depositions, arbitration, or client interviews.

1. Click the drop-down arrow next to the Create New button on the **Home** menu, and select **Outline** to create a new blank outline or select **Outline (from File)** to import an outline.
2. Enter the **Deponent** and **Outline** information into the boxes provided, then click **OK**.

Batch Save as PDF

Save multiple data types to PDF at one time.

1. Click the **Delivery** menu and select **Batch Save as PDF**.
2. Select the data to save. Select the check box in the header of either table column to select all items in that column. Select an entire folder of data or select individual items within folders.
3. Optionally, click **Groups** to include content from specific groups.
4. Select **Save Exhibits linked to Transcripts** to save exhibits.
5. Click **Save**.

Save Reports and Outlines as PDF files

Save reports and outlines as PDF files containing table of contents with hyperlinks to all referenced source documents, transcripts, pleadings, and research items.

1. Click the **Save A**s toolbar button at the top of the report display or click the **File** menu, point to **Save As**, and select **Report with Documents (PDF)** to save the report and associated documents to PDF. Associated documents appear as links in the report.
2. Click the **Save As** toolbar button at the top of the outline display or click the **File** menu, point to **Save As**, and point to **Outline**. Select to save **Outline with Exhibits (PDF)** to save the outline and associated exhibits to PDF.

Work with Designations

By default, Case Notebook includes three designation types: **Plaintiff**, **Defendant**, and **Plaintiff Objection**.

1. Open a transcript, click the drop-down arrow next to the **Transcript Designation** button on the **New** menu, and select **Transcript Designation**. The Designation section is displayed below the transcript.
2. Click **Manage Types** to create designation types, edit or delete existing types, and sort types in the Types drop-down list on the Designation section toolbar.

Apply Designations to Transcript Text

1. Open a transcript, click the drop-down arrow next to the **Transcript Designation** button on the **New** menu, and select **Transcript Designation**. The Designation section is displayed below the transcript.
2. Apply a designation using any of the following:
   - Select a start and end page:line from drop-down lists in the toolbar, then select a designation from the **Type** list.
   - Scroll to a location in the transcript, click on a line number to set the start point, click on a line number to set the end point, then select a designation from the **Type** list.
   - Type a page:line number in the start and end fields, then select a designation from the **Type** list.
3. Type designation notes in the field provided and later choose if you want to include them in printed output.
4. Close the Designation section using the close button on the top right of the section.

Search Content

Conduct a number of different searches from Case Notebook. Use the **Search** toolbar (to display it, click the **Home** menu and select the **Full Text Search** or **Search Westlaw** button on the **Search** tab to search across case content and access search options including searching Westlaw.

- Search across case content, in data associated with a defined group, or selected data for a word or phrase using the **Search** menu or **Search** toolbar drop-down arrow, **Full Text Search** option.
- Find a particular word in a transcript, pleading, document, or research file by typing the search word in the search field at the top of the Word Index. Once you find your search word, click the page: line number or page number to go to that word in the data type. The word is highlighted in the display.

CONDUCT A FULL TEXT SEARCH (CTRL+F)

1. Click t the **Full Text Search** button on the **Search** tab.
2. Type a search term into the **Terms** field. Use the **Connect** options at the bottom of the dialog to insert a connector into the Terms field. Noise words are ignored when using connectors.
   - **& AND**: Finds multiple search terms.
   - **space OR**: Finds either search term or both terms.
   - **! Root expander**: Finds any form of the root word.
   - *** Universal character**: Represents one variable character.
   - **" " Phrase**: Finds an exact phrase
   - **% But not**: Excludes any terms that follow %.
   - **/n Within n terms of**: Finds either term within the specified number of words from the other term.
   - **+n Preceding within n terms of**: Finds either term when the first term precedes the second term within the specified number.
3. Click **OK** to close the search properties and execute the search.

Open Content in New Window

View transcripts, documents, pleadings, or research files side by side or create, edit, and delete annotations on a dual monitor or on the same screen with the **Open in New Window** feature. Re-size and re-position the new window at your convenience.

To open content in a new window, right-click on the content in the Navigation pane and select **Open in New Window** from the drop-down menu. You may also select **Open in New Window** from the toolbar of a content item you have open in the Display pane. Right-clicking on an item in a grid list will also offer the **Open in New Window** option. You may have multiple viewer windows open at the same time. Hyperlinks to content within a report, full-text sources, and annotation sources under key facts may also be opened in a new window. Simply right-click on the hyperlink and select **Open in New Window** from the drop-down menu.

Customize Keyboard Shortcuts and Quick Access Toolbar

Click the **Tools** menu, select the Customize tab, and click the Ribbon Options button to customize keyboard settings and how you want the toolbar to display.

CUSTOMIZE KEYBOARD SHORTCUTS

1. Click the **Tools** menu, select the **Customize** tab, and click the **Ribbon Options** button.
2. Click the **Keyboard** tab.
3. Select the category containing the command from the **Category** drop-down list.
4. Select a command from the **Command** list. The key assignment (if a key is assigned) displays in the **Key assignments** list. To assign a new keyboard shortcut, type the shortcut in the **Press new shortcut key** field and click **Assign**.

CUSTOMIZE THE QUICK ACCESS TOOLBAR

1. Click the **Tools** menu, select the **Customize** tab, and click the **Ribbon Options** button.
2. Choose commands from the drop-down list provided, and select the command you wish to add/remove to the toolbar.
3. Click the **Add** >>> or **Remove** >>> button to add or remove the command to the toolbar.
4. Click **OK**.

Published 5/24 (version 5.8). L-367967

THOMSON REUTERS®