

Case Notebook Version Comparison

For assistance using Case Notebook, call 1-800-290-9378 or visit our contact page at <https://legal.thomsonreuters.com/en/contact>. For free reference materials, visit the Product support section at <https://legal.thomsonreuters.com/en/support>. Our products also contain comprehensive, searchable instruction available via the **Help** menu in the application.

VERSION 5.8

UPGRADE TO MICROSOFT® SQL SERVER 2019 EXPRESS

Case Notebook suite was upgraded from Microsoft® SQL Server 2014 Service Pack 3 (SP3) Express to Microsoft® SQL Server 2019 Express, which is a more powerful, reliable, and modern SQL solution.

The following enhancements were made in Case Notebook Administration to support this upgrade:

- SQL Server 2019 is supported only on 64-bit platforms, therefore an easy-to-use repository migration tool is available for users with an existing 32-bit SQL Server repository instance.
- Case Notebook automatically detects if the users' current repository resides on a SQL Server instance that is outdated.
- Upon login to Case Notebook Administration, users that are running the application on an outdated SQL Server instance are prompted to upgrade their repository to the current version of SQL Server for improved security and performance. Users have the option to start the migration process immediately, or do it later at their convenience. If they choose to proceed, a step-by-step wizard guides them through the migration process. Once the repository migration is complete, they are presented with an option to perform case migration immediately or later. For users that choose to perform the repository migration at a later time, a new menu item, Migrate Repository, is available in the existing list of options under the Repository menu.
- Users have the ability to perform case migration from a new menu item, Migrate, which is available in the existing list of options under the Case menu.
- Users have the ability to export cases in their entirety from a new menu item, Export, which is available in the existing list of options under the Case menu.
- A new file type, Cabinet files (.cab), was added to the list of existing file types which can be imported from the Case > Batch Import menu item which gives users the ability to import cases in their entirety.

Note: Users have the option to install Microsoft® SQL Server 2019 Express with the Repository. If they choose not to install Microsoft® SQL Server 2019 Express, then they can install Case Notebook Administration (NoSQL), and attach Case Notebook Administration to an existing repository (in Case Notebook Administration, close any open repositories, select the 'Repository' menu and then select 'Install SQL Server Repository').

The following enhancements were made in Case Notebook to support this upgrade:

- Once the repository migration is complete, upon login to Case Notebook, users are presented with a 'Repository Update Check' dialog box to inform them that the repositories in their list may be out of date.
- Users can click 'Yes' to check for updated repositories immediately. If users click 'No,' the dialog box is presented again at the next login, unless the 'Don't show me again' check box was selected previously.

COMPATIBILITY WITH MICROSOFT® SQL SERVER 2022

Case Notebook and Case Notebook Administration are now fully compatible with Microsoft SQL Server 2022 as part of our commitment to seamlessly integrate cutting-edge innovation across performance, security, and availability.

UPGRADE TO OPEN SSL (OPEN SECURE SOCKETS LAYER) 3.0.0 WITH TLS (TRANSPORT LAYER SECURITY) 1.2 ENABLED BY DEFAULT

Open SSL (Open Secure Sockets Layer) is a widely used set of encryption tools that provides secure communications using Transport Layer Security (TLS) and Secure Sockets Layer (SSL) protocols over the internet. The Case Notebook suite was upgraded to use Open SSL 3.0.0, which is the newest supported version of this security library, with TLS 1.2 enabled by default.

ABILITY TO CHANGE THE DEFAULT SETTING OF THE 'UNDISPUTED' OPTION FOR KEY FACTS IN CASE NOTEBOOK

Case Notebook users now have the ability to decide if they want to change the default setting of the 'Undisputed' option for Key Facts in the entire application. The 'Undisputed' option is selected by default. Users can contact Customer Technical Support (CTS) for assistance with changing this default setting.

SUPPORT

- Support Microsoft® SQL Server 2019 Express and Microsoft® SQL Server 2022

VERSION 5.7**UPGRADED NOVAPDF VERSION 11**

Case Notebook utilizes novaPDF to create high-quality searchable PDF files. This has now been upgraded to the newest version 11 in the Case Notebook suite of products to provide enhanced performance to users.

IMPROVED THE UNLOCK CODE ENTRY FUNCTIONALITY

The Unlock code entry box, where users enter an unlock code for certain functions, was changed from three separate boxes to only one box. The 'Copy Unlock to Clipboard' function enables users to copy the entire code with just one click.

SUPPORT

Case Notebook is now compatible with Windows Server 2022 (64-bit) operating system. When users are ready to upgrade, Case Notebook will integrate correctly with the new environments and applications.

VERSION 5.6**IMPROVED SECURITY OF THE CASE NOTEBOOK APPLICATION**

Improvements were made to Case Notebook as part of our ongoing commitment to application security excellence and compliance using industry leading tools.

UPGRADED OCR (OPTICAL CHARACTER RECOGNITION) ENGINE IN CASE NOTEBOOK

Optical Character Recognition, or OCR, is a technology that enables you to convert different types of documents, such as scanned paper documents, PDF files or images captured by a digital camera into editable and searchable data. Case Notebook utilizes world leading OCR technology from ABBYY, which has now been upgraded to the newest version to provide enhanced performance to users.

OPTION TO DIRECTLY ASSOCIATE A NEW KEY FACT TO THE SOURCE

Once a new key fact is created from the Properties window of a content item, users will be presented with a Yes and No prompt to link this new key fact to the content item or annotation without having to search for it. If the user clicks Yes, then the newly created key fact is automatically selected in the Key Facts tab of the properties dialog for the content item or annotation. If user clicks No, then the new key fact is created, however, it is not selected in the Key Facts tab of the properties dialog for the content item or annotation.

AUTO TAGS CREATED IN TRANSCRIPTS ARE HIGHLIGHTED IN THE MULTI-MONITOR VIEWER WINDOW

Automatically tagged words or phrases in a case using the Auto Tag option are highlighted when the case content is opened in the viewer window.

MODIFIED PERMISSIONS IN MANAGED CASES FOR EXTERNAL AND READER USERS

External and Reader users will no longer have the ability to create, edit, or delete data groups and content items in data groups. In addition, the Create New Case button will be disabled in managed cases for External users. As a result, External users will not have the ability to create a new case when they are accessing a managed case.

CLARITY IN THE MESSAGE REGARDING ENABLING ACTIVE DIRECTORY AUTHENTICATION

Case Notebook Admin users who attempt to reach the Active Directory service with their local credentials will be shown a clear message to inform them that the Active Directory service cannot be reached if they log in as a local user (with their local credentials). They must log in as a domain user in order to reach the Active Directory service and enable Active Directory authentication.

SUPPORT

Compatibility with Windows® 11 Home and Pro (64-bit).

VERSION 5.5**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

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.

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

SUPPORT

- Compatibility with Windows® Server 2019 and Microsoft® Office 2016.
- Support Microsoft SQL Server 2017 and 2019.

VERSION 5.1 (LIMITED RELEASE)**COMPATIBILITY WITH TLS 1.2 PROTOCOL FOR INCREASED SECURITY FOR FIRMS TO CONNECT TO THEIR REPOSITORY**

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VERSION 5.0**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.

VERSION 4.7

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 and review important actions in the organization's case repository, like creating and deleting of cases, users, and groups.

VERSION 4.6

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. This feature is not available to Case Notebook Research-only, Case Notebook Transcripts, and Hosted environment customers.

DELETE LOCAL CASES

Purge unwanted local case files permanently with the **Delete Local Cases** option available from the **File** menu in the Case Notebook toolbar.

SEARCH CASE LIST BY NAME

Search for a case by typing the case name in the **Search Case Names** box. The results will be displayed in realtime in the **Open Case** list of cases. Once you find the case, simply double-click the case name to open it.

OPEN A RECENT CASE

Sort cases by most recent case to display up to 15 local or repository cases from most recent to least recent and double-click the case name to open it.

DUPLICATE AN EXISTING KEY FACT

Use an existing key fact as a template, duplicate the properties of a key fact, and create new key facts quickly with the **Duplicate** feature.

VERSION 4.5**BATCH IMPORT KEY FACTS**

Quickly populate the Key Facts table with key descriptions and dates. Create links to source information with the .csv file batch import feature.

ASSOCIATE DATA WITH KEY FACTS

Assign full text documents, transcripts, pleadings, and research data items as sources for Key Facts.

IMPROVED INTEGRATION WITH CASE TIMELINE

Export full-text source documents, transcripts, pleadings, and research data items with Key Facts from Case Notebook to Case Timeline.

NEW BATCH SAVE FEATURE FOR REPORTS AND OUTLINES

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

REPORT ENHANCEMENTS

Choose different fonts and modify or remove the icons in your reports to represent transcript dates and titles in addition to an improved color display.

SUPPORT

- Compatibility with Windows Server 2016.
- Support Microsoft SQL Server 2016.

VERSION 4.0.1**DESIGNATIONS ENHANCEMENTS**

- The Designations List Report now includes specific video position information for each designation.
- The visibility of patterns distinguishing designation bars in transcript display and printouts have been improved.

SUPPORT

Compatibility with Windows® 10 Home and Pro (32- or 64-bit).

VERSION 4.0

CUSTOMIZABLE PROPERTIES

Create custom properties for specific metadata, fields, or tags. This feature allows you to retain and sort information contained in metadata, fields, and tags in files being imported into Case Notebook from another software application or external users.

BATCH SAVE AS PDF

Save multiple Case Notebook file types to PDF at one time.

LIST VIEWS FOR ALL DATA CATEGORIES

List 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.

DESIGNATIONS PRINTING

Select to print only the pages of the transcript that contain designated text.

SUPPORT

Compatibility with Windows® 10 Home and Pro (32- or 64-bit) and Microsoft® Office 2016.

VERSION 3.6.1

PRINT DESIGNATION DETAILS

Case Notebook 3.6 included a new Designations feature that will help litigators and their support teams create and print designations in preparation for trial. Version 3.6.1 added the ability to select options to print designation details.

SUPPORT

- Support Windows Server 2012 and Windows Server 2012 R2.
- Support Microsoft SQL Server 2012.

VERSION 3.6

DESIGNATIONS

Case Notebook 3.6 includes a new Designations feature that will help litigators and their support teams create and print designations in preparation for trial:

- Create designations and apply them to important transcript text.
- Import and export opposing counsel designations.
- Create a Designations List report and save it to a variety of formats.

DOCUMENT MANAGEMENT AND ANALYSIS

- Total page counts displayed for image files and all document types.
- Jump-to-page functionality for all document types.

INTEGRATION

- Send Firm Central™ documents directly to Case Notebook.
- Choose where you want to send Firm Central documents: Document, Pleading, or Research categories in Case Notebook.
- Option to include notes and highlighting when sending to Case Notebook.

SUPPORT

Compatibility with Windows® 8.1 Home and Pro (32- or 64-bit) and Microsoft® Office 2013.

VERSION 3.5

IMAGE TO TEXT CONVERSION

Case Notebook 3.5 converts image files, e.g., PDF, TIFF, and JPEG, to text so you can:

- Copy text directly from an image file and paste it in your word processor.
- Send the converted text of an annotation directly to your word processor.
- Send the converted text of an entire image brief to Drafting Assistant to allow citation recognition.

DESIGNATIONS

- Designate passages of deposition transcript testimony using an annotation import process.
- Export designated passages to a CSV file.

DOCUMENT EXPORT

Export documents from the Document List to a CSV file.

SEARCH TERM HIGHLIGHT COLOR

Select and save a different color for highlighted search terms.

VERSION 3.0

DOCUMENT MANAGEMENT AND ANALYSIS

- Create Doc-Level Issues and Doc-Level Notes in transcripts, documents, pleadings, and research documents.
- View documents in the Document List:
 - Sort documents by columns.
 - Freeze first column.
 - Multi-select documents for deletion.
- Create sub-categories in data groups.
- Add new properties for documents and pleadings, e.g., custodian, dates, and time.
- See an overview of all properties in Properties dialog boxes.
- View a summary of case contents in the Case Properties dialog box.
- Display any properties in reports.
- Sort Full Text Search, Issues, All Annotations, Auto Tags, and Quick Marks reports.
- Group annotations by issue.

INTEGRATION

- Send Case Logistix® version 5.4 or later documents to Case Notebook using corresponding properties, e.g., tags and IntelliFolders in Case Logistix correspond to issues and groups in Case Notebook.
- Link back to original documents in Case Logistix version 5.4 or later.
- Deliver Westlaw notes and highlights to Case Notebook.
- Import load files with document-level notes and issues.

ADMINISTRATIVE

- Batch print exhibits linked to transcripts.
- Add a header and footer for each page of a printed transcript.
- Rebuild the search index in Case Notebook Administration.

LIVENOTE REALTIME

- Use LiveNote™ Local Stream to connect to LiveNote Realtime by a local area network.
- Use Realtime Refresh to update edited transcripts during Realtime sessions Version 2.6.
- Sort Full Text Search results, search reports, and Auto Tag reports.
- View legacy attachments in transcripts.
- Add documents sent from Microsoft® Outlook and Case Logistix to groups.
- Play video from anywhere in a transcript with a single click.
- Edit video clips.
- Copy transcript text with citations.
- View the annotation range when printing transcripts.
- Link from annotations sent to CaseMap® from LiveNote version 8.3, 9, or 10 to Case Notebook version 2.6.
- Link to online lessons in the Help menu.

VERSION 2.6

- Sort Full Text Search results, search reports, and Auto Tag reports.
- View legacy attachments in transcripts.
- Play video from anywhere in a transcript with a single click.
- Edit video clips.
- Copy transcript text with citations.
- View the annotation range when printing transcripts.
- Link from annotations sent to CaseMap® from LiveNote version 8.3, 9, or 10 to West Case Notebook® version 2.6.
- Link to online lessons in the **Help** menu.

VERSION 2.5

- Send research documents to Case Notebook from Windows® Explorer.
- Print directly from transcripts, documents, and pleadings.
- Add multiple files and load files to data groups during import.
- Compatible with Microsoft Office 2010.
- Increased capacity for cases.
- Integration with CaseMap®.

VERSION 2.1

Integration with Drafting Assistant.

VERSION 2.0

OUTLINES

Add document text, reports, potential exhibits, transcript questions, and Westlaw documents.

CHARACTERS

- Import from comma separated value (CSV) files.
- Add automatically when importing transcripts, documents, or pleadings.
- Add automatically when changing properties of transcripts, documents, or pleadings.
- Add from smart tags list.
- Create aliases.
- Create Characters report.
- Retrieve character profiles from Westlaw.

MISCELLANEOUS

- Create transcript summaries.
- Organize data in folders using the Groups feature.
- Send key facts to Microsoft Word and Corel® WordPerfect®.
- Create sub-issues.
- Select individual cases and data when replicating offline.
- Send research documents from Westlaw to Case Notebook.
- Optical character recognition (OCR) technology upgraded for improved speed and accuracy.
- Remote Access Service (RAS) available.

VERSION 1.5

- Send documents and pleadings to Case Notebook from Windows Explorer and Microsoft Outlook.
- Send key facts from Case Notebook to Case Timeline™.
- Access LiveNote Stream™ through Case Notebook Terminal Service.
- Faster word indexing and report generation.
- Compatible with 64-bit systems.
- Automatic uninstallation of older versions.
- Version without Microsoft SQL Server® 2005 Express available.

VERSION 1.1

- Import RealLegal® Binder 5.0 and later files.
- Use Find&Print® to export Westlaw research to Case Notebook.
- Print transcripts with annotations in footer.
- Export key facts to Case Timeline file.
- Create key facts with start dates and times and end dates and times.
- Import E-Transcript Bundle (PTZ) files from West Publisher™.

