

Unlimited Workflow™ & Unlimited Multimedia™

Getting Started Guide

March 2006



RealLegal
a division of LiveNote

1.888.584.9988
www.reallegal.com

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LiveNote, Inc.

7995 E. Prentice Ave.
Ste. 303
Greenwood Village, CO 80111
(888) 584-9988

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Welcome

Welcome to the *My RealLegal Getting Started Guide*.

Overview

This document explains:

- The difference between a My RealLegal account and RealLegal E-Transcript Signatures.
- Setting up a My RealLegal Account.
- Enrolling with RealLegal E-Transcript Signatures.
- Setting up Mailbox.
- Making turn-in sheets available to remote court reporters.
- E-mailing Reporter Edition Registrations to remote court reporters.
- Enrolling with DepoSchedule.
- Requesting StenoBank be set up for you.

Life of This Document, First Quarter 2006

If you are reading this document in March of 2006 or later, check to see if E-Transcript Manager Version 8 has been released. If so, some of what is discussed in this document will have been automated.

Quick Reference and Downloads

Set up a My RealLegal account: <https://my.reallegal.com>

My RealLegal administrator e-mail address: subscriptions@reallegal.com

Download My RealLegal Getting Started Guide (this document) in PDF Format:
http://www.reallegal.com/downloads/pdf/RUW_GettingStarted.pdf

Download RealLegal Download E-Transcript Manager Install Guide:
<http://www.reallegal.com/downloads/pdf/ETranscript70InstalGuide.pdf>

Publisher Install Guide (for Unlimited Multimedia subscribers).
<http://www.reallegal.com/downloads/pdf/PublisherInstallGuide32.pdf>

Download the iBinder Setup Form (for Unlimited Multimedia subscribers)
<http://www.reallegal.com/downloads/iBinderSetup.doc>

Unlimited Workflow Information Online
<http://www.reallegal.com/RUWsubscriber.asp>

Unlimited Multimedia Information Online
<http://www.reallegal.com/RUMsubscriber.asp>

My RealLegal Account vs. RealLegal E-Transcript Signatures

If you want to sign transcripts electronically, you need to enroll with RealLegal E-Transcript Signatures. Enrolling entails sending to RealLegal LLC a signed and notarized form that verifies your identity.

RealLegal E-Transcript Signatures Explained

RealLegal E-Transcript Signatures are a feature of a My RealLegal account (StenoBank, DepoSchedule, and Reporter Edition are features of a My RealLegal account as well). You can think of satellite TV as an analogy: You create an account and then you decide which channels you want. The difference is you do not have to pay extra for using RealLegal E-Transcript Signatures. RealLegal gives you at no extra charge electronic signatures to use. Creating a My RealLegal account does not mean you can use RealLegal E-Transcript Signatures right away. You must complete a form, have it notarized, mail the form to us (RealLegal LLC | 7995 E. Prentice | Ste. 303 | Greenwood Village, CO 80111), and then we enable RealLegal E-Transcript Signatures.

How Come I Have to Create a My RealLegal Account and Enroll with RealLegal E-Transcript Signatures?

Enrolling with RealLegal E-Transcript Signatures helps RealLegal verify your identity.

Some courts accept electronically signed transcripts, without having a paper transcript. The electronic signature verifies the authenticity of the transcript, that it has not been changed, and the signature verifies the identity of the court reporter. In short, RealLegal E-Transcript Signatures reduce the chance of forged or altered electronic transcripts.

Since RealLegal is playing an integral part in producing the electronic signature, it is incumbent upon RealLegal to verify the identity of the court reporter. A notarized form and physical signature is the most common way to verify someone's identity. After we receive the notarized form from you that includes a physical signature, we can allow you to sign transcript electronically.

How to Set up a My RealLegal Account

If you think you have a My RealLegal account but do not know your user ID, contact a RealLegal Sales representative at 1.888.584.9988 and ask someone to lookup your RealLegal account.

Before creating a new account, you should check to see if you already have one (over 4000 RealLegal customers already have an account). Questions you might ask yourself are:

- Am I a reseller? Resellers may have a My RealLegal account. Contact a RealLegal sales representative at 1.888.584.9988 and ask the person to help you find your user ID.
- Has a RealLegal employee ever sent me a link that I clicked and then went to My RealLegal? If so, you may have set up an account at that time.
- Has a RealLegal employee ever e-mailed me a product registration code? If so, you may have set up a My RealLegal account.
- Do you have your user ID for My RealLegal? If so, visit <https://my.reallegal.com> and click the **Forgotten your password** link that is below the RealLegal Login heading.

To set up a My RealLegal account:

1. Visit <https://my.reallegal.com>.
2. Click the **Create a RealLegal account** link that is below the RealLegal Login heading.
3. Complete the form, make a note of your user ID and password, and then click **Save**. You are sent a link in an e-mail to verify your e-mail address.
4. Open your e-mail, open the e-mail RealLegal sent to you, and click the **link** (or copy the link and paste it into your browser's Web address field). The My RealLegal E-mail Verification page opens.
5. Click **Continue**. The Welcome to My RealLegal page opens.
6. Type your user ID and password in the fields provided and then click **Login**.

You have successfully created a My RealLegal account.

Enrolling with RealLegal E-Transcript Signatures

To enroll with RealLegal E-Transcript Signatures, you need to:

1. If you have not already done so, you need to set up a My RealLegal account or retrieve your user ID and password for My RealLegal. If you do not know your user ID, contact a RealLegal Sales representative at 1.888.584.9988 and ask someone to lookup your My RealLegal account
2. Visit <https://my.reallegal.com>
3. Click **Signatures** on the left navigation bar.
4. If you have a My RealLegal account, type your user ID and password in the fields on the right and continue with Step 10.
5. If you do not have a My RealLegal account, click **Enroll Now**.
6. Click the link that reads **Click here to create your user profile**.
7. Complete the form and then click **Save**. You are notified that an e-mail has been sent to you. Open the e-mail, click the link or paste the link into your Web browser. The E-mail Verification page opens.
8. Click the **Continue** link. The E-Transcript Signatures enrollment page opens.


9. Type your Password and then click **Login**. You are directed to a page that has a link on it called **Yes, display form**.
10. Click **Yes, display form**. The form opens. Notice the **Print** link on the top left.
11. Click the **Print** link to print the form and then click **Done**.
12. On the E-Transcript Signatures Enrollment page, click the **Continue** link to open the E-Transcript Signatures Home page.
13. Follow the instructions on the form you printed and sign it in the presence of a notary public.
14. Mail the form to RealLegal (RealLegal LLC | 7995 E. Prentice Ave| Ste. 303 | Greenwood Village, CO 80111).
15. RealLegal will then approve you as an authorized signor of electronic transcripts.

Setting up Mailbox

Court Reporters and Production Department Personnel: After you have created a My RealLegal account (or received your user ID and password for your existing account), you need to set up RealLegal E-Transcript Manager Mailbox.

The Mailbox allows remote court reporters to send you E-Transcripts and turn-in sheets that E-Transcript Manager automatically imports, thereby bypassing problems that can occur when e-mailing transcripts (for example, e-mail firewalls sometimes block RealLegal E-Transcripts).

To set up a Mailbox from E-Transcript Manager:

1. Open E-Transcript Manager.
2. Under the Link heading on the Home page of E-Transcript Manager, click **Click to Activate**. You are prompted for a My RealLegal user ID and password.
Note: If you are working on a project, click the **Home Page** button () and then click the **Click to Activate** link.
3. Type the **user ID** and **password** and then click **Login**. You are prompted to create your Mailbox.
4. Type a name for the Mailbox in the **Mailbox Name** field (be sure to make a note of the Mailbox name) and then click **Save**. You are notified that you have successfully created a Mailbox.
5. Click **Continue**. The Mailbox has been created.

E-mailing Your Mailbox Name to the My RealLegal Administrator

E-mail your Mailbox name to subscriptions@reallegal.com.

After you set up the Mailbox, the My RealLegal site administrator can give you free Reporter Edition registrations that you can then forward to your court reporters who work remotely. Reporter Edition allows court reporters to create RealLegal E-Transcripts, sign them electronically, and then send them to you along with turn-in sheets.

In order to know where to deposit the Reporter Edition Licenses, the My RealLegal administrator must know your Mailbox name.

Note: To use Reporter Edition, your remote reporters must create a My RealLegal account. If you want your remote reporters to sign transcripts electronically, they must create a My RealLegal account and enroll with RealLegal E-Transcript Signatures.

Making Turn-in Sheets Available to Remote Court Reporters

If your firm uses turn-in sheets, then, after setting up the Mailbox, you must set up the turn-in sheet. If you, as a member of the production department, do not set up the turn-in sheet, it will not be immediately available to remote court reporters who use E-Transcript Reporter Edition. The reporters will have to contact you, request that you make the turn-in sheet available, and then download it from your Mailbox.

Types of Turn-in Sheets


Two types of turn-in sheets are provided:

Long Sheet: The Long Sheet provides many common fields.

Short Sheet: The Short Sheet is a blank turn-in sheet that remote court reporters can edit to meet their requirements.

Procedure

Use the following procedure to select the turn-in sheet:

1. From within RealLegal E-Transcript Manager, access the Mailbox.
 - If you are on the Home page, click the **Mailbox** link.
 - If you are working on a project, click the **Home Page** button () and then click the **Mailbox** link.
2. On the Mailbox Member List page, click the **Turn-In Sheet** link (colored background, top right).
3. Notice that to the right of each turn-in sheet is a View link and a Set link. You have the following options:
 - Click the **View** link to review a turn-in sheet.
 - Click the **Set** link to make the selected turn-in sheet the one that reporters using your Mailbox must use.
4. After you click the Set link, you have the following options:
 - Click the **View** link to view the turn-in sheet you have selected.
 - Click the **Remove** link to remove the turn-in sheet you have selected.
5. Click the **Done** button to complete the process.


Sending Reporter Edition Software to Court Reporters

As a member of a production department or as the owner of a court reporting firm, you may need to send Reporter Edition software to court reporters. Reporter Edition allows court reporters to create RealLegal E-Transcripts, sign them electronically, and then send them to you along with turn-in sheets.

As explained in the “E-mailing Your Mailbox Name to the My RealLegal Administrator” topic above, the RealLegal administrator gives you free registrations to Reporter Edition that you can forward to remote court reporters.

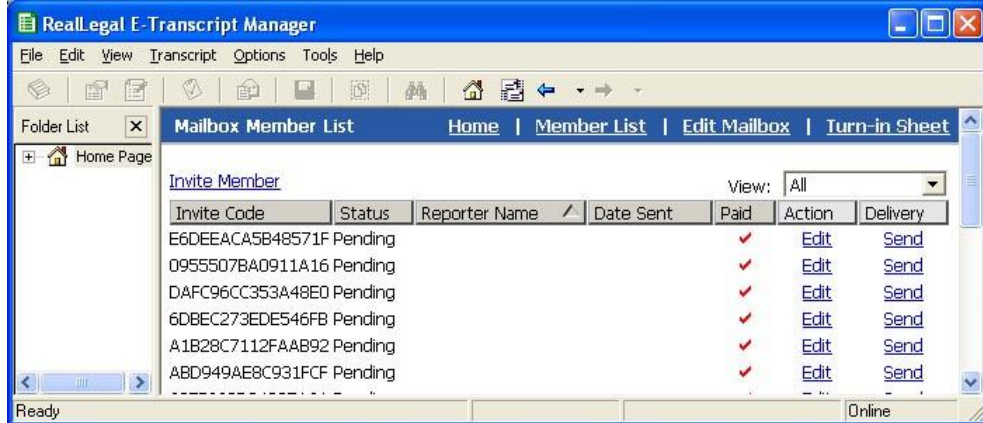
Note: Sending Reporter Edition registrations to court reporters is referred to as sending an invitation.

To send Reporter Edition invitations to remote court reporters:

1. From within RealLegal E-Transcript Manager, access the Mailbox.
 - If you are on the Home page, click the **Mailbox** link.
 - If you are working on a project, click the **Home Page** button () and then click the **Mailbox** link.

Notes:

- If you are prompted for a My RealLegal account and do not have (or do not know) your user ID and password, refer to “How to Set up a RealLegal Account “ in this document.
- If the RealLegal site administrator has issued free Reporter Edition registrations to you, you see a page that looks similar to the following:



2. Click **Send**. You are given options for sending the invitation.
3. Click **Email** and then click **Next**. The Send Email page opens.
4. Type the person’s name and e-mail address, customize the message as necessary, and then click **Finish**. The e-mail is sent to the person.

The recipient of the invitation needs to:

1. Click the **link** in the e-mail (or copy the link to his or her Web browser). The Welcome to Invitation page of My RealLegal opens.
2. Click **Submit** and login to My RealLegal if he or she has an account. Or, if the reporter has a My RealLegal account but does not know the user ID, the person needs to call RealLegal at 1.888.584.9988 and ask a sales representative to look up the user ID.

After the reporter successfully logs in to My RealLegal, a prompt asks to install Reporter Edition.

3. Click **Yes**. The Mailbox Details page opens.
4. Click **Install E-Transcript Reporter Edition for this mailbox**. The Reporter Edition Setup dialog box opens.
5. Click **OK**. Reporter Edition is installed and the user is asked to enter the RealLegal Password for the account.
6. Type the **Password** and then click **OK**. The reporter can now use Reporter Edition to send you transcripts and turn-in sheets. Instruct the reporter to view Reporter Edition's online help for detailed procedures.

Note: If you want your remote reporters to sign transcripts electronically, they must enroll with RealLegal E-Transcript Signatures.

Enrolling with DepoSchedule

DepoSchedule is offered at no extra charge. Enrolling with DepoSchedule gives you a free Web site address where clients can book you for a deposition.

There are three basic steps for enrolling with DepoSchedule:

1. Create a Scheduling Page.
2. Access page after approval.
3. Edit account after approval.

Detailed procedures are provided below.

Note: Use your existing My RealLegal account for DepoSchedule. If you have already created a My RealLegal account, please do not create another one. Use your existing user ID and password. If you do not remember your user ID, contact a RealLegal sales representative at 1.888.584.9988 and ask him or her to look up your user ID. Once you know your user ID, visit <https://my.reallegal.com> and click the **Forgotten your password** link. An e-mail that contains your Password will be sent to you. If you *do* need to create a My RealLegal account, refer to "How to Create a My RealLegal Account" in this document.

To create your scheduling page:

1. Visit <https://my.reallegal.com>.
2. Click the **login** link. The Login Page opens.
3. Type your **user ID** and **password** and then click the **Login** button.
4. Click the **DepoSchedule** link on the left navigation bar. The Welcome to DepoSchedule page opens.
5. Click **Create or edit your schedule page**. The **Schedule Page Setup** page opens. Notice that the first step is to create a My RealLegal account. This procedure assumes you have created a My RealLegal account. If you have not done so, create the account and follow the instructions on the screen.
6. Click **Create Your Scheduling Page**.

7. To see a sample of how a scheduling page looks to clients who are scheduling a deposition, click **View a sample of the scheduling page**.
8. Complete the fields as follows:
 - Page title:** Type a title for your Web page.
 - Scheduling e-mail:** Type the e-mail address you want clients to use when they schedule a deposition.
 - Confirm e-mail:** Retype the e-mail address to verify its accuracy.
 - Company name:** Type the name of your company.
 - Address:** Type the address of your company.
 - City, State, Zip:** Type the city, state and zip.
 - Web site URL:** Type your company's Web address. This must be an existing page on the World Wide Web. If your company does not have a Web site, leave this field blank.
 - Logo (gif/jpg):** You can brand your scheduling page with a company logo or other image. Click the **Browse** button to navigate to the location of the image and open it.
 - Page Caption:** Type a page caption. After DepoSchedule is setup, the page caption appears near the top of the scheduling page.
9. Click the **Terms and Conditions** link and read the provided information.
10. Close the Terms and Conditions page and then click the **I accept the Terms and Conditions** checkbox.
11. Click the **Save** button. The **Court Reporter Home** page opens, and you are sent a notification e-mail of your pending approval for the DepoSchedule Web page.

To Access your Scheduling page via the approval e-mail:

1. Later when you receive the actual approval, open the e-mail, and read its instructions. Notice that you are instructed to include the scheduling page URL in RealLegal E-Transcript Manager. This scheduling information will then be available to your clients when they open an E-Transcript. To include the scheduling information in E-Transcript Manager, copy the complete Schedule Page URL from the e-mail, and then, in E-Transcript Manager, click **Options** and then click **Company Information**. Notice the **Scheduling page** field near the bottom of the General Contact Information dialog box. Paste the Schedule Page URL into the **Schedule Page** field, and then click the **OK** button.
2. Return to the e-mail and then click the **link** that allows you to administer your site.
 - Note:** If you have trouble making the link work, visit <https://my.reallegal.com>, login, click **DepoSchedule** on the left navigation bar, and then click **Create or edit your schedule page**.
 - The Court Reporter Home page opens.

3. You have the following options:
 - To view your scheduling page, click the **View** link.
 - To edit your identifying information, click the **Edit** link.
 - To view new requests for depositions, click the **New** link.
 - To view depositions you have accepted, click the **Accepted** link.
 - To view depositions you have declined, click the **Declined** link.

To edit your DepoSchedule page at any time after approval:

1. Open your Web browser and visit <https://my.reallegal.com>
2. Click the DepoSchedule on the left. The Welcome to DepoSchedule page opens.
3. Click the **Create or edit your schedule page** link. The Schedule Page Setup opens.
4. Click the **login** link. The Login Page opens.
5. Type your **user ID** and **password** and then click the **Login** button.
6. You have the following options:
 - To view your scheduling page, click the **View** link.
 - To edit your identifying information, click the **Edit** link.
 - To view new requests for depositions, click the **New** link.
 - To view depositions you have accepted, click the **Accepted** link.
 - To view depositions you have declined, click the **Declined** link.

Requesting the StenoBank Service

StenoBank is free with Unlimited Workflow. It provides a secure place to store your steno notes and dictionaries. Why do you need this service? Imagine you were a court reporter in New Orleans during the hurricane and floods of 2005. All of your steno notes could have been lost during the disaster; however, if you had uploaded your steno notes to StenoBank, they would have been safe.

StenoBank Explained

StenoBank is your own private Web site. Customers cannot access it. You can place steno notes images, or anything else on the site. If you are familiar with FTP sites, then you know what StenoBank is; it is a customized FTP site. If you are not familiar with FTP sites, do not be deterred; it simply means a place on the Internet where you store files for safe keeping.

Accessing StenoBank

If you discussed StenoBank with your sales representative and requested that you be enrolled in StenoBank, the service may be already accessible to you.

To find out, visit <https://my.reallegal.com> and click StenoBank on the left navigation bar.

- If you have been enrolled in the service, the Welcome to StenoBank page opens and you see headings such as **Upload File, Transcripts, Dictionaries**.
- If you have *not* been enrolled in the StenoBank Service, you see a bunch of text and a link that reads Subscribe to StenoBank. **Do not click the link** because it will attempt to charge you. Get the free version instead by following the instructions immediately below.

How to Request the StenoBank Service

Send an e-mail the subscriptions@reallegal.com and request that you be enrolled in the StenoBank service. Be sure to include your My RealLegal user ID in the e-mail.

Requesting iBinder

If you subscribed to Unlimited Multimedia, download the iBinder Setup form, complete it, and e-mail it to subscriptions@reallegal.com. You can also fax it to 303.584.9988, ATTN: My RealLegal Administrator. The Web address for the iBinder form is:

<http://www.reallegal.com/downloads/iBinderSetup.doc>

iBinder is a Web-based application that accepts Publisher Bundles and works with RealLegal Binder, a desktop application for attorneys.

Court Reporters use iBinder as a Web-based repository for Publisher Bundles. Once a Bundle is uploaded to iBinder, court reporters can designate which attorneys have access to a Bundle.

Attorneys use iBinder to collaborate on cases over the Web. Attorneys can use a court reporter's iBinder repository to access Publisher Bundles. Or, attorneys can purchase an iBinder repository of their own and then upload Bundles they receive from court reporters to iBinder.