

RealLegal Unlimited Workflow

featuring E-Transcript Manager version 8

Set-up Guide



RealLegal

1.888.584.9988
www.reallegal.com

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RealLegal

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

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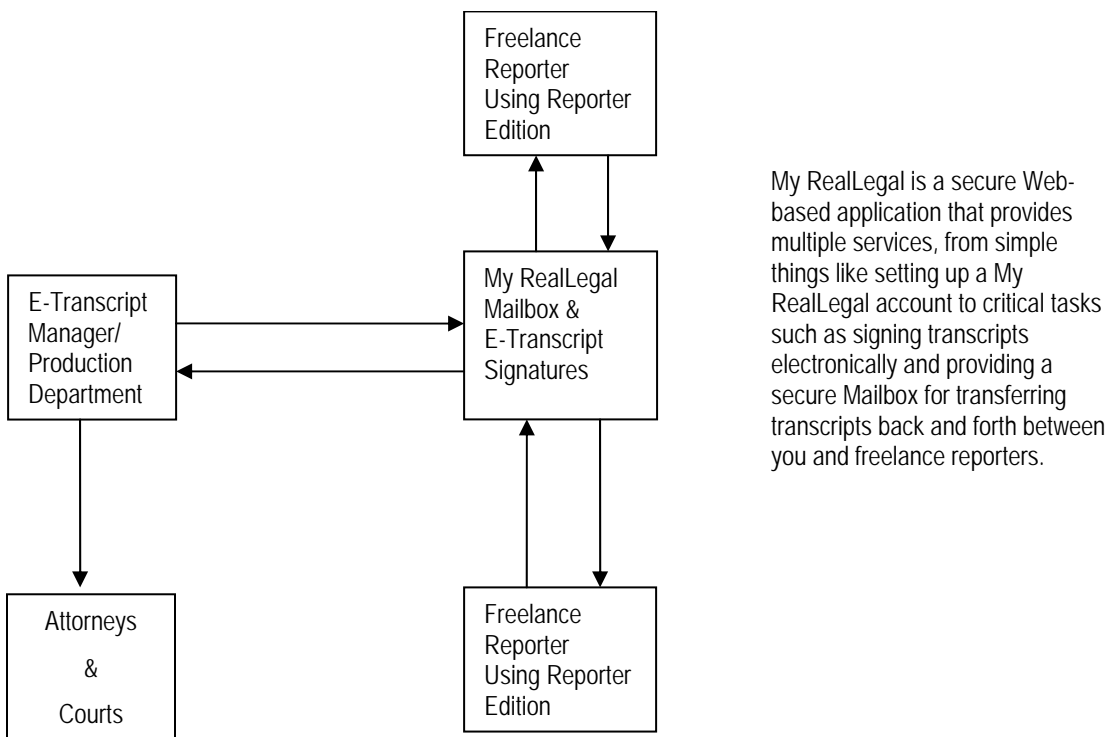
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Overview of Unlimited Workflow

Welcome to RealLegal Unlimited Workflow. Your Unlimited Workflow subscription includes E-Transcript Manager and all of the related RealLegal products that facilitate how you, your production department, and your freelance reporters prepare transcripts for your clients. Specifically, Unlimited Workflow allows you to collaborate with remote reporters who work for you, send transcripts back and forth, sign transcripts electronically, and deliver RealLegal E-Transcript files to attorneys and courts.

This document details how to set-up E-Transcript Manager and all of the related products and services, collectively called My RealLegal Web Services. The graphic below demonstrates how each person involved in the typical office workflow will use the technology. The arrows indicate how RealLegal E-Transcript files can travel back and forth between you, your team, and your clients.

Workflow for RealLegal E-Transcript Files



New Customer Overview

E-Transcript Manager interacts with your My RealLegal account to process E-Transcript Signatures. Your My RealLegal user ID and password allow you to log in to E-Transcript Signatures and to access your Mailbox from E-Transcript Manager.

Reporters use their My RealLegal user ID to log in to E-Transcript Signatures and to send transcripts from E-Transcript Reporter Edition. This document provides detailed procedures for getting everything set up, but as an overview:

1. Instruct your freelance reporters to create a My RealLegal account and enroll with E-Transcript Signatures. Having freelance reporters set up their account and enroll with signatures in advance saves time and prevents problems when you send E-Transcript Reporter Edition invitations to reporters. For detailed information refer to "Sending E-Transcript Reporter Edition Invitations" later in this document.

Note: Everyone must enroll with E-Transcript Signatures individually. It is not possible to "trick" the system and have one person print the form, click the Back button, change the information, print again, and so forth. It will not work. It will cause problems for you and all your reporters. All your reporters must enroll with E-Transcript Signatures using their individual My RealLegal accounts user IDs. They must print their own forms and click all the links in the procedure.

2. Work with a RealLegal sales representative to set up a My RealLegal account. Call 1.800.548.3668.
3. Activate E-Transcript Manager.
4. Send E-Transcript Reporter Edition invitations to your freelance reporters.
5. Set up freelance reporters as authorized users of your signatures.

Activating E-Transcript Manager

Your subscription to Unlimited Workflow entitles you to multiple products and services, including E-Transcript Manager. Activating E-Transcript Manager:

- Automatically adds a supply of E-Transcript Signatures to your account.
- Automatically sets up a Mailbox that sends transcripts, turn-in sheets, graphics, and messages back and forth between you and freelance reporters. The Mailbox is accessed from within E-Transcript Manager.
- Automatically provides you with E-Transcript Reporter Edition licenses that you can access from within E-Transcript Manager. Using E-Transcript Manager and the Mailbox, you can then invite freelance reporters to install E-Transcript Reporter Edition.
- Other Web services are made available to you as well. For example, you can use the RealLegal StenoBank Web site to store steno notes online, and you can direct your clients to your DepoSchedule account where they can schedule depositions online.

To activate E-Transcript Manager:

1. Contact a RealLegal account manager at 1.800.548.3668 and start a subscription.
2. After the sale, the account manager will send you a New RealLegal Product Registration e-mail with an activation code in it. The code activates the E-Transcript Manager software included with your subscription. Save the e-mail.
3. When you receive the E-Transcript Manager software (via CD or downloaded from www.reallegal.com), install the software, open the e-mail from your account manager and copy the Invitation Code.
4. Open E-Transcript Manager. You are notified the application is not registered.
5. Click **OK**. The Company Information dialog box opens. You need this information to place on headers and footers, cover pages, and so forth.
6. Complete the information on the Company Information dialog box and then click **Close**.
7. Click **Activate**. The RealLegal Login page opens.
8. Type your My RealLegal user ID and password and then click the **Login** button. The Register RealLegal E-Transcript Manager page opens.
9. Click the second option **I have received an Invitation Code from RealLegal and my Invitation Code is** and then paste the Invitation code into the field.
10. Click **Next**. The Create a New Mailbox page opens (actually you are just giving your Mailbox a name).
11. Type a name for the Mailbox.
Remember: This name will be visible to reporters working for you who use E-Transcript Reporter Edition. Use a descriptive name that will help them identify your production department and differentiate it from other production departments.
12. Click **Finish**.
13. Click **Done**. You are notified that the application is registered.
14. Click **OK**. You are routed to the Reporter Edition List page. Continue with "E-Transcript Reporter Edition."

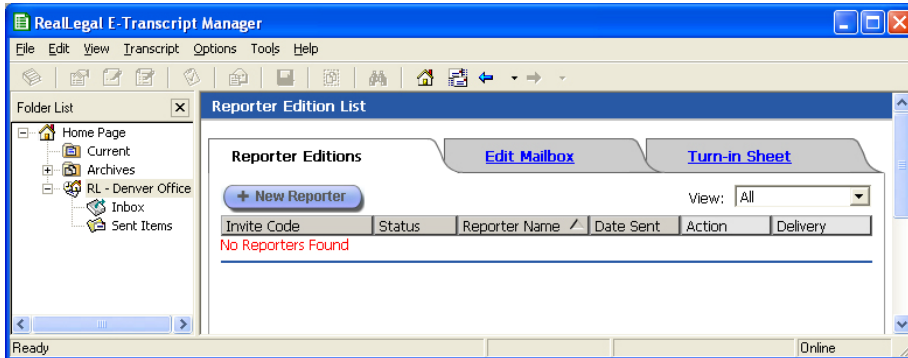
E-Transcript Reporter Edition

E-Transcript Reporter Edition is a "lite" version of the E-Transcript Manager software. It allows reporters to import ASCII files, RealLegal E-Transcript files, and so forth. Reporters can edit transcripts or even type new transcripts. Reporters can apply turn-in sheets that you make available from E-Transcript Manager, and, when they send transcripts to you or to other reporters, they have the option to sign or not to sign transcripts. You, in turn, using E-Transcript Manager, can edit transcripts and send them back to reporters when necessary.

To ensure the production department maintains control of the look and feel of transcripts, E-Transcript Reporter Edition does not allow reporters to set up transcripts for printing, nor can reporters apply security features such as lockout codes and passwords to transcripts. Reporters cannot save transcripts they create to their desktop; they can only send them to the production department.

Sending E-Transcript Reporter Edition Invitations

After you activate E-Transcript Manager and your Mailbox, you are routed to the Reporter Edition List page:



As part of your subscription to RealLegal Unlimited Workflow, you are given multiple registrations (licenses) of E-Transcript Reporter Edition that you can distribute to freelance reporters who send you transcripts.

Ideally – and this is to save you time and effort -- before you send E-Transcript Reporter Edition invitations to the reporter, you want the reporter to:

- Create a My RealLegal account if the reporter does not already have one.
- Enroll with E-Transcript Signatures. Why should you care *when* the reporter enrolls? If the reporter is enrolled with E-Transcript Signatures *before* you send the E-Transcript Reporter Edition invitation, then the reporter is automatically added as an authorized user of your signatures. In other words, you do not have to add the reporter manually as an authorized user.

What is an authorized user? An authorized user is someone who draws E-Transcript Signatures from your account when signing transcripts. The actual signature and seal will be that of the reporter who signs the transcript. You are given E-Transcript Signatures as part of the subscription to Unlimited Workflow.

To send E-Transcript Reporter Edition to reporters:

1. Click **New Reporter**. The Invitation Method page opens.
2. Click the **Email** option and then click **Next**. The Send Email page opens.
3. Type the name of the reporter in the **Name** field and then type the reporter's e-mail address in the **Email** field.
4. Click **Finish**. E-Transcript Manager sends an e-mail to the reporter. The e-mail includes a link that, when clicked, installs E-Transcript Reporter Edition.

What E-Transcript Reporter Edition means to you: After the reporter installs E-Transcript Reporter Edition, your Mailbox name appears on the left of the reporter's version of E-Transcript Reporter Edition, and the reporter can send you RealLegal E-Transcript files. Transcripts sent from Reporter Edition appear in your E-Transcript Manager Inbox. Refer to "Overview of Reporter Edition" in E-Transcript Manager online help for more information.

Instructions for the Reporter:

The reporter who receives the E-Transcript Reporter Edition 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 log in to My RealLegal. The Mailbox details page opens.
Note: At this point you may see a message below the address bar in Internet Explorer that instructs you to install an ActiveX control. Please install the ActiveX control. You cannot install Reporter Edition without the ActiveX control.
3. Click **Install E-Transcript Reporter Edition for this mailbox**. The Reporter Edition Setup dialog box opens.
4. Click **OK**. E-Transcript Reporter Edition is installed, and the reporter is asked to enter his or her My RealLegal password.
5. Type the **Password** and then click **OK**. The reporter can now use E-Transcript Reporter Edition to send you transcripts and turn-in sheets. Instruct the reporter to view E-Transcript Reporter Edition's online help for detailed procedures.

Adding Authorized Signature Users

An authorized signature user is someone who draws E-Transcript Signatures from your account when signing transcripts. The actual signature and seal will be that of the reporter who signs the transcript.

Note: You need a person's My RealLegal user ID to add him or her as an authorized user of your signatures.

To add a reporter as an authorized user of your E-Transcript Signatures:

1. To open the E-Transcript Signatures Web site from within E-Transcript Manager, click **Tools** and then click **Signature Account**. Or, you can open Internet Explorer and visit <https://sign.reallegal.com>.
2. Log in with your My RealLegal user ID and password.
3. After you access the E-Transcript Signatures Home page, click **Edit My Billing Accounts**. The Billing Accounts page opens.

If you see names of reporters who work with you in the Account Name column, it means those reporters have been added as authorized users. One of the names is likely to be your name or the name of your company and it is colored, indicating it is a link.

Note: Although it is referred to as a “billing account,” you are not being charged extra for the signatures. The signatures are provided as part of your subscription to Unlimited Workflow.

4. Click the colored **Account name**. The Billing Account page opens.
5. Click the **Authorized users** link.
6. To add an authorized user, type the person’s RealLegal user ID in the available field and then click the **Add** button.
7. Click **Save**.
8. Click **Back**.
9. Click **Back** again. You are now on the E-Transcript Signatures Home page.

Verifying Your Identity to Sign Transcripts

If you plan to sign transcripts, you need to verify your identity with RealLegal. This procedure may have already been completed. Before performing the tasks listed below, please contact a RealLegal account manager at 1.800.548.3668.

To verify your identity:

1. Visit <https://sign.reallegal.com/>
2. Log in with your My RealLegal user ID and password.
3. Click **Enroll Now**.
4. Click **Yes, display form**. The form opens. Notice the **Print** link on the top left.
Note: If the form window does not open, please disable your popup blocker. On the menu bar of your Web browser, click **Tools** and turn your pop-up blocker off.
5. Click the **Print** link to print the form and then click **Done**.
6. On the E-Transcript Signatures Enrollment page, click the **Continue** link to open the E-Transcript Signatures Home page.
Note: The “Pending Approval” message indicates RealLegal must receive and approve your notarized form before you can sign transcripts electronically.
7. Follow the instructions on the form you printed and sign it in the presence of a notary public.
 - You cannot notarize the form for yourself.
 - RealLegal does not accept handwritten forms.
 - Sign in black ink on the line and press hard. Signing on the line benefits you, because, after your signature has been scanned and uploaded to My RealLegal, you can attach the signature to transcripts. Signing on the line makes it easier to align the signature on the transcript.
 - Mail the original notarized form. Faxes and e-mails are not accepted. The notarized seal must be in its original form.
8. Mail the form to RealLegal (RealLegal | 221 Main Street | Suite 1250 | San Francisco, CA 94105).
9. RealLegal will then approve you as an authorized signor of electronic transcripts.

Making Turn-in Sheets Available to Remote Court Reporters

You set up a turn-in sheet in E-Transcript Manager, and the Mailbox makes the turn-in sheet available to freelance reporters who use E-Transcript Reporter Edition.


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.

To set up 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. 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.

Customers Currently Subscribed to Unlimited Workflow Upgrade Procedure

You will receive an e-mail with "RealLegal Product Subscription" in the Subject line. The e-mail includes your activation code for RealLegal E-Transcript Manager Version 8. Download the software from www.reallegal.com/download.asp or contact your RealLegal account representative at 1.888.584.9988 to request the software.

Note: Be sure to back up your existing E-Transcript files before you upgrade.

To activate the software:

1. Install E-Transcript Manager Version 8.
2. Open the RealLegal Product Subscription e-mail and copy the Invitation Code.
3. Open E-Transcript Manager. You are notified the application is not registered.
4. Click **OK**. E-Transcript Manager opens, and the General Contact Information dialog box opens.
5. Complete the company information and contact information.
6. Click **Activate**. The RealLegal Login page opens.
7. Type your My RealLegal user ID and password.
8. Click the second option **I have received an Invitation Code from RealLegal and my Invitation Code is** and then paste the Invitation code into the field.
9. Click **Next**. The Subscription Name page opens.
10. You have the following options:
 - Click the **first option** to upgrade your existing Mailbox. This option is the most common option to select.
 - Click the **second** option to create a new Mailbox.
11. Click **Finish**. E-Transcript Manager is activated.
12. Click **Done**.

Other My RealLegal Web Services

Your Unlimited Workflow subscription also entitles you to use DepoSchedule and StenoBank.

DepoSchedule

DepoSchedule is a Web site (<http://deposchedule.com>) where your clients can contact you online and schedule a deposition.

Enrolling with DepoSchedule

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.

To create your scheduling page:

1. Visit <https://my.reallegal.com>.
2. Click the **login** link. The Login Page opens.
3. Type your My RealLegal **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.
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, for example "All Write Reporting Scheduling 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 a RealLegal E-Transcript file. 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**, click **Transcript Themes**, and then click the **Edit** button to the right of **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. For detailed instructions refer to E-Transcript Manager online help.

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 My RealLegal **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.

The StenoBank Service

StenoBank is included with your Unlimited Workflow subscription. It provides a secure Web site to store your stenographic 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.

Requesting the StenoBank Service

Send an e-mail to 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.

Accessing StenoBank

If you discussed StenoBank with your account manager and requested that you be enrolled in StenoBank as part of your subscription, 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 text and a link that reads **Subscribe to StenoBank**. **Do not click the link** because it will attempt to charge you. To avoid the charge, follow the instructions immediately above for the service to be set up (at no additional charge) as part of your subscription.