# *STAR WEBINAR SERIES*

*Course Title: The Power of Panes*

November 17, 2020

7:00 – 8:30 p.m.

Presenter: Grace Molson

Certified Independent Training Agent

INDEX

# Viewing, Positioning and Auto Hiding Panes

To display a closed dialog pane, press **Alt + v, e** (**View/Panes**) and then select a pane from the submenu. A check mark shows next to the feature to indicate it is displayed. To close a dialog pane, click the X in the title bar or deselect it from the View/Panes submenu.

You can increase or decrease the horizontal size of the pane. If you see information in the pane followed by ... (ellipses) it is an indication that there is more information or data to be shown. To increase or decrease the horizontal size of a pane, position your cursor on the free edge (a side that is available to move) of the pane, your cursor will change to a horizontal double arrow. Left click and drag the edge to the horizontal position you want. Once the ellipses are no longer displaying, all the data in the pane can be seen.

## Auto Hide Dialog Panes

Dialog panes in auto hide mode quickly display when you hover your cursor on the auto hide tab. To auto hide a pane, click the push pin on the title bar of a dialog pane, changing it to a horizontal position . The horizontal position indicates the pane is in auto hide mode. Move the cursor off the pane to hide it as a tab along the edge of the Case CATalyst screen. Hover the cursor over or click the tab to temporarily display the pane. To return the pane to the fixed position on the screen, click the push pin from a horizontal to vertical position.

## Reposition Dialog Panes

A fixed or "docked" pane and a floating pane can be repositioned. You cannot reposition a pane that is in AutoHide mode. The Title bar of a dialog pane with a vertical push pin indicates the pane is in a "docked position. To return a dialog pane from AutoHide to a docked position, hover the cursor on the auto hide tab. When the pane displays, double click the Title bar of the pane or click the push pin to a vertical position.

To move a dialog pane, click the Title bar and hold the mouse button. As you move the pane, placement icons display on the screen. Single arrow icons display on each side of the screen and a multi-arrow icon displays in the center of the screen. These placement icons provide positioning options. Hover the cursor over an icon to view the new placement position. Release the mouse button to position the dialog pane in the new location.

## Position On Screen Edge

Use the single arrow icon to position a dialog pane along an edge of the Case CATalyst screen. Click the Title bar of a dialog pane and hold the mouse button as you move the pane. Place the tip of your cursor on the single arrow icon for the desired screen location. A transparent blue box displays, indicating the placement position. Release the mouse button to position the dialog pane in the current location.

When another pane or panes already display along the edge of the Case CATalyst screen, the moved dialog pane positions along the outermost edge of the screen.

## Position Next to Another Fixed Pane

Use the multi-arrow icon to position a dialog pane next to an existing fixed pane. Click the Title bar of a dialog pane and hold the mouse button. Place the tip of your cursor on one of the arrows in the multi-arrow icon. A transparent blue box displays, indicating the placement location. Release the mouse button. The moved dialog pane displays next to the existing fixed pane.

## Position to Share a Location

Use the multi-arrow icon position fixed dialog panes next to each other within the same location. Click the Title bar of a dialog pane and hold the mouse button as you move the pane to the desired fixed pane location. The multi-arrow icon displays in the center of the stationary pane. Place the tip of your cursor on one of the arrows. A transparent blue box displays, indicating the placement location. Release the mouse button. The moved dialog pane displays in the shared space.

## Position to Share a Location Using Tabs

Use the multi-arrow icon to position a dialog pane in the same location of another fixed pane and add tabs. The tabs allow you to toggle the display of panes. Click the Title bar of a dialog pane and hold the mouse button as you move the pane to the desired fixed pane location. The multi-arrow icon displays in the center of the fixed pane. Place the tip of your cursor on the center of the multi-arrow icon. A transparent blue box displays, indicating the placement location. Release the mouse button. Tabs are added for each pane in that location. If tabs for multiple panes already exist, a tab is added for the moved pane.

To separate an individual pane from a shared position, double click the dialog pane tab. The selected dialog pane displays on the screen where you can move it to a new location or close it. To separate all the tabbed dialog panes, double click the title bar of the open pane.

## Float Dialog Panes

You can place a floating pane anywhere on the Case CATalyst screen. A floating pane is not anchored to a location and may cover text or other screen items depending on its placement. Double click the Title bar when the pane is floating, to place it in a fixed position.

# REVEAL CODES

Reveal Codes is an Edit feature that displays formatting information along with the transcript text inside a dialog pane. Use the Reveal Codes pane to identify and delete unwanted formatting information such as paragraph styles, format symbols or headers.

The background color of the Reveal Codes pane is gray when the cursor focus is in the body of the transcript. When the cursor focus is in the Reveal Codes window, the background color is the same as the transcript background. You may want to create a key combination for the Set Focus to Edit keyboard command to move the cursor focus between the Edit screen and the Reveal Codes pane.

When you adjust the size of the Reveal Codes pane, the text remains the current size and the pane increases or decreases the number of lines of text displayed. Using the Display, Reveal Codes Font feature, you can change the font, font style and font size. To change the color of the font, it is necessary to modify a setting in your UserSettings file.

You can increase or decrease the horizontal size of the pane. If you see information in the pane followed by ... (ellipses) it is an indication that there is more information or data to be shown. To increase or decrease the horizontal size of a pane, position your cursor on the free edge (a side

that is available to move) of the pane, your cursor will change to a horizontal double arrow ( ). Left click and drag the edge to the horizontal position you want. Once the ellipses are no longer displaying, all the data in the pane can be seen.

Press **Ctrl + Shift, r** (**View/Panes/Reveal Codes**) to display the Reveal Codes dialog pane.

# VERTICAL NOTES

Vertical Notes is an Edit feature that displays the steno notes in paper tape format within the Vertical Notes dialog pane. The steno notes display in the Arial Monospaced font by default. You can change the font and font style using the Vertical Notes Font feature. By default, the Vertical Notes pane displays as a tab on the right side of the screen.

The vertical notes automatically scroll with the cursor movement on the screen and also allow for manual scrolling throughout the note file. You can edit the job, making dictionary definitions from vertical notes pane. Global definitions made from vertical notes apply throughout the job in the same manner as defining from the Edit screen. Use the Set Focus to Edit keyboard command to move the cursor focus from the Vertical Notes pane to the Edit screen.

You can increase or decrease the horizontal size of the pane. If you see information in the pane followed by ... (ellipses) it is an indication that there is more information or data to be shown. To increase or decrease the horizontal size of a pane, position your cursor on the free edge (a side

that is available to move) of the pane, your cursor will change to a horizontal double arrow ( ). Left click and drag the edge to the horizontal position you want. Once the ellipses are no longer displaying, all the data in the pane can be seen.

Steno outlines in the vertical notes that display in light gray can indicate the steno outline:

•was deleted using asterisk delete from the writer.

•was deleted using the Delete key on the computer keyboard.

•was written while power defining. These are not the initial strokes to invoke Power Define.

•is a number converted by a Number Conversion or Number Trigger.

•was written for an AccelerWriter.

To toggle the Vertical Notes display open and closed, press **Ctrl + n** (**View/Panes/Vertical Notes**). A check mark indicates that Vertical Notes is active.

# EZ TEXT

EZ Text displays the EZ Text table in a dialog pane on the Edit screen. The EZ Text table allows you to create up to 20 strings of text which you can insert into the transcript or the Text field of a dialog box. Each text line can contain up to approximately 900 characters including conflicts, scan stops, format symbols, etc. EZ Text lines are stored in the EZ Text table located in the Systems Files case.

To insert an EZ Text line into the transcript while editing, position your cursor at the location in the transcript where you want the text and do one of the following:

•Highlight the EZ Text entry and click Insert on the EZ Text toolbar.

•Double click an EZ Text entry from the EZ Text dialog pane.

•Press F4 plus the EZ Text entry number; for example, F4 2. To insert EZ Text entry 10, press F4 0. To insert EZ Text entry 12, press F4 Shift + 2.

You can also insert EZ Text lines into the Text field of a dialog box. For example, you may want to create EZ Text entries that contain format symbols which do not have a shortcut key combination, allowing you to quickly insert the format symbols into dictionary definitions or a dialog box. To insert an EZ Text entry into a Text field of a dialog box, position the cursor in the Text field, press F4 and then press the EZ Text entry number.

You can increase or decrease the horizontal size of the pane. If you see information in the pane followed by ... (ellipses) it is an indication that there is more information or data to be shown. To increase or decrease the horizontal size of a pane, position your cursor on the free edge (a side

that is available to move) of the pane, your cursor will change to a horizontal double arrow ( ). Left click and drag the edge to the horizontal position you want. Once the ellipses are no longer displaying, all the data in the pane can be seen

## Create and Modify EZ Text Lines

1.Press **Alt + v, e, e** (**View/Panes/EZ Text**).

2.Use the fields and options as necessary:

Number

Identifies the number associated with the EZ Text line listed in the Text field. The first ten lines are numbered #1 through #10 and the next five lines are numbers Shift + 1- 0.

Text

The current text for the EZ Text entry, if any, displays in this field.

Insert

Insert the highlighted EZ Text line into the transcript. Case CATalyst places the entry into the job at the cursor location. You can also double click an entry to insert it into the transcript or press F4 plus the EZ Text line number; for example, F4 2.

Modify (Ctrl + m)

Highlight an EZ Text line and click the **Modify EZ Text Entry** icon. The EZ Text Assignment dialog box displays with the current text from the highlighted EZ Text line. Make necessary entries and press **Enter** (**OK**).

Text

Type new text or make changes as necessary. Each text line can contain up to approximately 900 characters including conflicts, scan stops, format symbols and extended characters. The maximum number of EZ Text lines is 15.

Insert Auto Include

Display the EZ Text Auto Include dialog box. Select an Include file to associate with the selected EZ Text key. Do the following:

a.Select **Browse** to display the Choose Include File dialog box.

b.Navigate to the location of the file you want to insert. This may be a credit or XDS file.

c.Select a file and press **Enter** (**Open**). The file name displays in the Entry Text field. The "at" symbol, @, at the beginning of the entry designates the file as an Include file and must precede the file name.

Insert Field

Display the Insert Field dialog box from which you can select a field to insert into the definition. For example, you may have entries for dropped examinations and want to use the EZ Speaker fields. You create the entry: <Centered Paragraph>DIRECT EXAMINATION<By-line>BY[!EZ SPEAKER 1]:<Question>

FS

Display the list of available format symbols. Double click the format symbol you want to use or highlight the format symbol and press **Enter**. You can insert a format symbol at any point in the text entry. To have the format symbol list always display, check the Always Show Format Symbols box. You can also use shortcut keys to insert a format symbol.

Insert Auto Include File

Highlight an EZ Text line and click the **Modify EZ Text Entry** icon. The EZ Text Auto Include dialog box displays with the current text from the highlighted EZ Text key. Choose an Include file to associate with the selected EZ Text key:

a.Select **Browse** to display the Choose Include File dialog box. To use the associated layout with the selected include file, check the box **Bring Layout**.

b.Navigate to the location of the file you want to insert.

c.Select a file and press **Enter** (**Open**). The file name displays in the Entry Text field. The "at" symbol, @, at the beginning of the entry designates the file as an Include file and must precede the file name.

Delete

Highlight the EZ Text line and press **Delete** or click the **Delete** icon. Choose **Yes** at the confirmation prompt.

Print

Print the EZ Text table. In the Print dialog box make any necessary changes and press **Enter** (**OK**).

3.Press **Ctrl + s** (**File/Save**) to save the changes.

4.Press **Alt + f, x** (**File/Exit**) to close and exit the EZ Text table.

# SPEAKER LIST

The Speaker List contains speakers created using the Create EZ Speakers feature, typed speaker names entered before translating in the Translate Speaker List and Common Speakers added in Field Options. The Speaker List pane in Edit allows you to insert speaker names or other fields directly into the job. For example, you may need to insert the speaker name for a dropped steno outline or misidentified speaker. Speaker fields from the Fill In Field List or Field List Groups used to identify speakers, can be added to the Speaker List. In addition to using EZ Speaker fields and Speaker fields from the Fill In Field List, you can add predefined fields such as the Seal Date field or a user define field such as Location. Speaker names and Speaker # fields display in the Speaker section of the Speaker List. All other fields display in the

Fields section. The Speaker List pane can display a total of 310 unique speakers. EZ Speakers 01 - 100 are standard (specific steno) speakers, 101 - 299 are super (placeholder in lieu of steno) speakers and 300 - 309 are common speakers.

The Speaker section of the Speaker List displays the speaker name along with the speaker number and the associated steno, if applicable. Speakers from the Speaker section insert into the transcript as Colloquy, unless the cursor location is immediately before or after a Question, then Case CATalyst inserts it as a By Line. To specify the By Line format, use the By Line Options. The speaker name displays in the job with the color assigned to it in the Speaker List. You can add and modify speaker entries in the Speaker List.

The Field section of the Speaker List displays the field value in the Name column and the empty field name in the Number column. Fields from the Field section insert into the transcript as text without formatting. Fields can be added to the list using the Settings option in the Speaker List dialog pane. Additional Field options are accessed through the Settings option.

When a speaker name in the Speaker List contains text that is part of a Personal Global or E-Define, the Personal Global or E-Define applies to the inserted speaker. The Advanced Global Option, *Use Personal Global*, must be active to automatically apply text that is part of a Personal Global. The Advance Global Option, *Apply E-Defines to typed-in text,* must be active to apply automatically apply text that is part of an E-Define. For example, you are required to bold the speaker name in Colloquy and By Lines. You include the bold attribute as part of your speaker definitions. Since the bold formatting attribute does not carry over to the Speaker List you create a Personal Global to apply the bold attribute.

Using the speaker names from the Speaker List, you can create a graphical Seating Chart, viewable in the MiniViewer at the top of the Speaker List dialog pane or on the computer screen. Speakers display in their assigned colors. When viewing the Seating Chart on the screen, the speaker indicator includes the speaker name, speaker number and, if applicable, the associated steno.

Brief it, when active, automatically creates a brief for a speaker when you create a new speaker using the Create EZ Speaker feature, insert a new speaker from the Speaker List dialog pane or modify a speaker name from the Speaker List. Briefs are not generated for Common speakers in the Speaker List.

The Speaker List works in conjunction with Spell Check during Edit. For example, you have a repeated speaker in colloquy. Spell Check displays speaker names from the Speaker List in the Suggestions field and allows you to change to another speaker name in that job.

Insert a speaker name or field into the job from the Speaker List by double clicking the entry or highlighting the entry and clicking the Insert button. To insert a speaker name into the transcript without opening the Speaker List, use the Insert Speaker command.

You can increase or decrease the horizontal size of the pane. If you see information in the pane followed by ... (ellipses) it is an indication that there is more information or data to be shown. To increase or decrease the horizontal size of a pane, position your cursor on the free edge (a side

that is available to move) of the pane, your cursor will change to a horizontal double arrow ( ). Left click and drag the edge to the horizontal position you want. Once the ellipses are no longer displaying, all the data in the pane can be seen.

To access the Speaker List pane in Edit, press **Alt + v, e, k** (**View/Panes/Speaker List**).

SPEAKER LIST PANE FEATURES

Name

In the Speaker section, the defined speaker name or the name of the speaker field. In the Field section, the value of  the field or the empty field name. Click the title bar to display the names in ascending or descending alphabetical order.

Steno

Type the steno, if any, you want to associate with the speaker. You can retain the association by checking the box in the Locked field. If you have your speaker identifications defined in a dictionary, most likely your Personal Dictionary, and you always want them to display in the speaker list, type the associated steno and select the Locked column. Instead of using the Create EZ Speakers feature, you will simply fill in the field in the transcript or Speaker List.

Locked

Check this box to retain the association of the steno entered in the Steno field with the speaker number. If you have your speaker identifications defined in a dictionary, most likely your Personal Dictionary, and you always want them to display in the speaker list, type the associated steno in the Steno field and select the Locked column. Instead of using the Create EZ Speakers feature, you will simply fill in the field in the transcript or Speaker List.

Insert

Insert the highlighted speaker name or field into the transcript. You can also double click an entry to insert it into the transcript. Speaker fields either insert as Colloquy or Byline depending on cursor location. If your cursor is located following a colloquy or question paragraph style, the speaker will be inserted as Colloquy. If your cursor is positioned after an answer paragraph style, the speaker will be inserted as a by line. To customize how your by line is inserted using this feature see By Line Options.

New Speaker

Create a new speaker name. The Select EZ Speaker dialog box displays with the next sequential speaker number. Use the displayed number in the Enter Value field or type a new number and press **Enter** (**OK**). Valid number are **1 - 99**. A new speaker name field displays with the assigned speaker number. Type the name in the field and press **Enter**.

Fill in Speaker

Modify an existing speaker or user defined field name. Highlight an entry and select **Fill in Speaker**. When you modify a speaker name, type the change and press **Enter**. When you modify a user defined field, the Fill in Field dialog box displays. Make necessary entries and select **OK**.

Change Color

Change the speaker name color. Highlight the field and select **Change Color**. Select a color from the color palette. The More Colors options displays the Color dialog box for additional and custom colors.

You can also change the field color assignment. Highlight a field and select **Change Color** to select a color from the color palette. The change affects the user color for all fields.

Delete

Delete an existing speaker name entry. Highlight the entry and press **Delete** or click the Delete icon. To remove a field from the list, click the Settings icon to uncheck the field from the list in the Choose Speaker List Fields dialog box.

Filter

Select this option to display all the available speakers with associated speaker numbers. Deselect this option to only display speaker numbers with assigned speaker names.

Allcap Text

Select this option to enter the speaker name in all capital letters. Deselect this option to enter the Speaker Name in upper and lower case letters.

Show/Hide Seating Chart MiniViewer

Select this option to display the Seating Chart MiniViewer above the speaker list in the Speaker List dialog pane. The MiniViewer shows the placements of the Seating Chart speakers. Deselect this option to hide the MiniViewer. You can still display the Seating Chart speakers.

Show/Hide Seating Chart Speakers

Select this option to display Seating Chart speakers on the screen. Deselect this option to automatically hide the Seating Chart speakers. This is the default. When you move your cursor over the MiniViewer, the Seating Chart speakers display on the screen for a few seconds and then automatically hide. You can change the number of seconds the Seating Chart displays before it automatically hides or have the Seating Chart continuously display.

Options

Display the Speaker List / Seating Chart Options dialog box where you can choose additional fields to add to the Speaker List. Click the option, *Add fields to Speaker List* and check the box next to the fields you want to add to the Speaker List. Click **OK** when finished. You can modify the name of new user defined fields. Field Options are also accessible from the Choose Speaker List Field dialog box.

# HIDDEN TEXT

The Hidden Text feature displays the Hidden Text dialog pane which shows all the Hidden Text in the transcript along with the page location. You can  search, modify, delete and print items.

The Hidden Text dialog pane displays the line of Hidden Text, the page and the line number on which it occurs and the section number. You can sort the list by clicking a column heading. Alternate ascending and descending order by clicking on the same column heading again. An arrow in the column indicates the sort order.

Double clicking an entry in the Hidden Text dialog pane moves the cursor to the location in the file where the selected Hidden Text occurs.

You can increase or decrease the horizontal size of the pane. If you see information in the pane followed by ... (ellipses) it is an indication that there is more information or data to be shown. To increase or decrease the horizontal size of a pane, position your cursor on the free edge (a side

that is available to move) of the pane, your cursor will change to a horizontal double arrow ( ). Left click and drag the edge to the horizontal position you want. Once the ellipses are no longer displaying, all the data in the pane can be seen

Access the Hidden Text dialog pane in Edit:

•Press **Alt + v, e, h** **(View/Panes/Hidden Text**).

•Double click a hidden text entry in the transcript.

## Hidden Text Dialog Pane Features

Modify (Ctrl + m)

Highlight an entry and click the Modify icon. Case CATalyst moves the cursor to the line in the job where the selected Hidden Text occurs and displays Hidden Text dialog box.

Add, delete or modify the Hidden text. Insert format symbols or fields as necessary. When finished, click **OK**.

Delete

Highlight an entry and press Delete or click the **Delete** icon to remove the Hidden Text entry from the transcript. Choose **Yes** at the confirmation prompt.

Search

Search the Hidden Text. In the Search dialog box make necessary entries and press **Enter** (**OK**).

Search

Type the text you want to locate in the Hidden Text dialog box. Use the remaining options, as necessary.

Entry Type

Check this box and select the criteria from the drop down list:

•Numbers — The first entry that contains numbers.

•Contain Format Symbol — The first entry that contains a format symbol.

•Contains field(s) — The first entry that contains a field.

•Phrase — The first entry that contains two or more words separated by a space.

Case Sensitive

Check this box to limit the search based on the upper and lower case letters of text typed in the Search field. If you do not select Case Sensitive, the search finds all words containing the indicated characters, regardless of the case typed into the field. This field is unavailable when you select to search by Entry Type.

Whole Word

Search only for the words that match the text typed in the Search field. If you do not select Whole Word, the search finds the word both as it stands alone and as part of another word. This field is unavailable when you select to search by Entry Type.

FS

Include a format symbol in the Search. Type the format symbol or display the format symbol list by clicking **FS** and double click a format symbol to choose it. It is unavailable when you select to filter by Entry Type.

Insert Field

Include a field in the Search. Click **Insert Field** and double click a field from the list to choose it. This field is unavailable when you select to filter by Entry Type.

Location

Limit the search to include one of the following criteria. These fields are unavailable when you select to search by Entry Type.

•Exact Match — Search for entries that exactly match the text entered in the Search field.

•Begins With — Search for entries that begin with the text entered in the Search field.

•Ends With — Search for entries that end with the text entered in the Search field.

•Contains — Search for entries that contain, anywhere in the entry, the text entered in the Search field.

Direction

Select one of the following:

Forward

Search forward from the cursor position to the end.

Backward

Search backward from the cursor position to the beginning.

Filter

Display the Hidden Text based on specific criteria.

Filter

Select a criteria from the drop down list and type the appropriate entry in the field to the right:

•Text — All entries for the specified text. Type the text. Include any other optional filtering features.

•Page — All entries on a specific page. Type the page number in the field.

•Line — All entries for a specific line number. Type the line number in the field.

•Sec— All entries for a specific section. Type the section number in the field.

Entry Type

Check this box and select the criteria from the drop down list:

•Text — All entries that contain specific text criteria. Select a criteria from the drop down box to the right:

⬩Numbers — The first entry that contains numbers.

⬩Contain Format Symbol — The first entry that contains a format symbol.
⬩Contains field(s) — The first entry that contains a field.
⬩Phrase — The first entry that contains two or more words separated by a space.

•Page — All entries on a specific page. Type the page number in the field.

•Line — All entries for a specific line number. Type the line number in the field.

•Sec— All entries for a specific section. Type the section number in the field.

Case Sensitive

Check this box to limit the filter based on the upper and lower case letters of text typed in the field. If you do not select Case Sensitive, the filter displays all words containing the indicated characters, regardless of case. This field is only available when filtering by typed text in the field.

Whole Word

Filter only for the words that match the text typed in the field. If you do not select Whole Word, the filter displays the word both as it stands alone and as part of another word. This field is only available when filtering by the typed text in the field. It is unavailable when you select to filter by Entry Type.

FS

To Filter with format symbol, type the format symbol or display the format symbol list by clicking FS and double click a format symbol to choose it. This field is only available when filtering by the typed text in the field. It is unavailable when you select to filter by Entry Type.

Insert Field

Filter with a field. Click Insert Field and double click a field from the list to choose it. This field is only available when filtering by the typed text in the field. It is unavailable when you select to filter by Entry Type.

Location

Filter by one of the following criteria. These fields are unavailable when you select to filter by Entry Type.

•Exact Match — Filter entries that exactly match the text typed in the field.

•Begins With — Filter for entries that begin with the text typed in the field.

•Ends With — Filter entries that end with the text typed in the field.

•Contains — Filter entries that contain, anywhere in the entry, the text typed in the field.

Remove Filter

Display all the Hidden Text.

Print

Print the Hidden Text. In the Print dialog box make any necessary changes and press **Enter** (**OK**).

# HOT SPOTS

Hotspots is a dialog pane that contains occurrences of the Oops format symbols (up to 10 Oops categories available), an empty (undefined) field or an untranslate in the transcript. For example, you might have an Oops format symbol category that you write when you need to check the spelling before someone leaves the proceedings. With the Hotspots pane, you can quickly find all the occurrences of where you need to check spellings before all participants leave the proceedings.

The Hotspots dialog pane displays the entire transcript line along with the page, line number and section number on which an Oops format symbol, empty field or untranslate occurs. The different entry types display in separate color coded groups. Lines containing the Oops format symbol display in the color selected in the Hotspots pane Options. Each Oops category can have a different color assignment and name. By default, the Oops categories display at the top of the list, followed by empty fields in blue and then lines containing untranslates in green. You can set the Hotspots options to hide item types you do not want displayed and you can also Filter in the Hotspots pane to see exactly what you want (see Filter/Sort before). The Hotspots options affect both regular CATalyst translation and CATalyst BCS captioning.

Double click a Hotspots entry to move the cursor to that location in the transcript. If the Hotspots entry is an undefined field Case CATalyst also opens the Fill-in-Field dialog box based on the field type. If the Hotspots entry is an untranslate, Case CATalyst positions your cursor immediately before the untranslate in the transcript. If there is more than one untranslate on a transcript line, a Hotspots entry displays for each untranslate. When the Hotspots audio option is active for the selected Hotspots entry, double clicking on the Hotspots entry plays the audio, if any, associated with the entry.

You can search, sort, modify, delete and print the Hotspots entries. Use the Hotspots icons on the title bar of the Hotspots dialog pane.

## Hotspots Pane Features

Click a column heading to sort the entries in ascending and descending order. An arrow in the column indicates the sort order.

Double click an entry to move the cursor to the location in the file where the selected Hotspots occurs. Review the line and make any necessary changes.

Modify (Ctrl + m)

Highlight an entry and click the **Modify** icon. Case CATalyst moves the cursor to the line in the job where the selected Hotspots entry occurs.

Delete

Highlight an entry and press **Delete** or click the **Delete** icon to remove the Oops format symbol from the transcript. By default, a confirmation prompt displays. Choose **Yes** to delete the entry. You can change the display of the confirmation prompt by changing the Hotspots Pane option, *Prompt before deleting Oops format symbol?*. The Delete feature is only available for Oops entries.

Search

Search the Hotspots entries . In the Search dialog box make necessary entries and press **Enter** (**OK**).

Filter / Sort

When displaying the Hotspots pane in Edit, you can easily sort the entries by category. Simply click the **Type** column heading and the entries will sort in either ascending or descending order based on the alphabetic name of the type of item displayed in Hotspots.

To Filter the Hotspots pane:

1.With your cursor focus in the Hotspots pane, press **Ctrl** + **f** or click the Filter icon ( ).

2.The Filter dialog box displays. Do **any** of the following:

- The Filter dialog box defaults to a Text filter with the cursor in the Text field. Type the text you want to filter on that may be in an entry in the Hotspots pane. **Go to Step 4**.

- To Filter on a specific type of item in the Hotspots pane such as an Oops format symbol assigned to "spelling", click the down arrow next to Text and select Type. In the Text field type the item name to which you want to filter. **Go to Step 4**.

- To Filter on the type of item in the Hotspots pane and select from a list of items (such as untranslates or empty fields or a particular Oops category), click the down arrow next to Text and select Type and then press **Alt** + **e** to select the Entry Type option. The Text field will display an entry. Click the down arrow at the end of the Text field to see additional items. Select the type of Hotspots item. **This is the most popular filter option**. All other options are disabled, **go to Step 6**.

- This is a universal Filter dialog box so there may be additional filter options that do not necessarily apply in the Hotspots pane. For example, you can filter base on a page number, line number or section number. These additional Filter options don't usually apply when filtering in Hotspots.

3.If in Step 3 you selected Text and typed the text in which you wanted to filter, you can narrow the filter:

- Press **Alt** + **v** to filter on the specific text based on the case of the letters typed.

- Press **Alt** + **o** to filter on the specific text as a whole word.

4.If, based on your Filter options, the Location field is available, do **one** of the following:

- Press **Alt** + **x** to filter on an exact match of the text typed.

- Press **Alt** + **b** to filter on entries that begin with the typed text.

- Press **Alt** + **n** to filter on entries that end with the typed text.

- Press **Alt** + **i** to filter on entries that end with the typed text.

5.To filter, press **Enter** or click **OK**.

6.To remove the filtered display in the Hotspots pane, click the Remove Filter ( ) icon.

Remove Filter

Display all the Hotspots entries.

Print

Print the Hotspots. You can print Hotspots entries to a printer or to PDF. In the Print dialog box make any necessary changes and press **Enter** (**OK**).

Settings

Modify the Hotspots dialog pane options.

# CLIPBOARD

Clipboard is an Edit feature that allows you to copy and cut text, storing up to ten items while editing. There is no limit to the amount of text you can copy or cut for each item. Selecting Copy twice on the same highlighted text automatically opens the Clipboard. Selecting Copy again, toggles the display of the Clipboard. Items sent to the Clipboard remain available for all edit files during the current Case CATalyst session. Once you close Case CATalyst, the Clipboard items are deleted unless you lock one or more items.When you lock Clipboard items, those items will remain on the clipboard even when you close Case CATalyst. For example, you are working on a case that is expected to last a week. There are a few lengthy text items that need to be added to each job. You copy those items to the Clipboard and lock them. Every time you open a job, even after closing and reopening CATalyst, those items are available for pasting. When you no longer need them, you simply unlock the items and when you close CATalyst, they will be removed from the Clipboard..

The Clipboard displays in a dialog pane. As you copy and cut items to the clipboard, the newest item is stored at the top of the list. Items are added to the list, regardless of the clipboard being displayed or hidden. If you copy and cut more than 10 items, Case CATalyst removes the oldest item and adds the new text to the top of the list. You can lock a Clipboard item, preventing it from being removed from the list as new entries are added. The appearance of an entry changes to identify the item as locked. When you lock Clipboard items, those items remain on the clipboard even when you close Case CATalyst. For example, you are working on a case that is expected to last a week. There are a few lengthy text items that need to be added to each job. You copy those items to the Clipboard and lock them. Every time you open a job, even after closing and reopening CATalyst, those items are available for pasting. When you no longer need them, you simply unlock the items and when you close CATalyst, they will be removed from the Clipboard.Items remained locked until they are individually unlocked or the Unlock All button is used.

You can paste any of the 10 items into the job using the Clipboard or by pressing an assigned keyboard command. Invoking the Paste command inserts the last item copied into the job. The text of Clipboard entries can be pasted into the Text field of a dialog box. In the Text field of a dialog box, press F11 and then type the number for the clipboard item. Numbers 0 - 9 are valid. For example, you want to copy exhibit descriptions into the Make Exhibit Index Entries dialog box. Copy each description to the clipboard. Open the Make Exhibit Index Entries dialog box and in the description text field press F11 and then press the desired Clipboard number.

## Using the Clipboard

1.Press **Alt + v, e, b** (**View/Panes/Clipboard**) to open the Clipboard dialog pane.

2.Highlight the text you want to copy or cut and press **Ctrl + c** (**Edit/Copy**) or **Ctrl + x** (**Edit/Cut**). Case CATalyst adds the item to the list in the number one position. Repeat copying and cutting text as necessary. Selecting Copy twice on the same highlighted text automatically opens the Clipboard. Selecting Copy again, toggles the display of the Clipboard.

To lock a Clipboard item, right click the item in the Clipboard dialog pane and select **Lock**. You can also invoke the assigned Toggle Clipboard Lock keyboard command for that item while editing. You must first create a keyboard map assignment.

To unlock a Clipboard item: Right click the item in the Clipboard dialog pane and select **Unlock**. To unlock all locked items, click the **Unlock All** button. You can also invoke the assigned Toggle Clipboard Lock keyboard command for that item while editing. You must first create a keyboard map assignment.

You cannot delete individual items from the Clipboard. Use **Clear All** to remove all the items from the Clipboard.

3.To paste a Clipboard item, position your cursor in the job at the point you want to insert the text.

4.In the Clipboard dialog pane, position your cursor in the box that contains the text you want to insert and press **Enter**. Case CATalyst inserts the text immediately after the last cursor location in the job.

**Things to know**:

•Items sent to the Clipboard remain available for all edit files during the current Case CATalyst session.

•Locked Clipboard items remain in the Clipboard when Case CATalyst is closed.

•Locked Clipboard items will have brackets [ ] around the Clipboard item number.

•Keyboard Map functions are available for locking/unlocking Clipboard items and for pasting Clipboard items.

•Selecting Copy twice on the same highlighted text automatically opens the Clipboard. Selecting Copy again, toggles the display of the Clipboard.

## BRIEF IT

The Brief It translation feature that suggests conflict free brief forms for words and phrases that you write during a realtime job. When you write three or more steno strokes, Case CATalyst generates a brief form or reminds you of an existing brief form and displays it in the Brief It dialog pane. The Brief It option on the Case CATalyst Translate Options Realtime tab must be checked for Brief It to be active during realtime writing. By default, the option is active. Live Suggestions are also displayed in the Brief It pane.

Brief It Options determine certain customized settings that control how Case CATalyst suggests briefs in the Brief It dialog pane during realtime. You can create Personal Briefs, include and exclude keys in suggested briefs, suggest only one stroke briefs and identify common words that occur at the beginning or end of phrases to prevent a brief from being suggested. You may want to customize Brief It before beginning translation.

You can increase or decrease the horizontal size of the pane. If you see information in the pane followed by ... (ellipses) it is an indication that there is more information or data to be shown. To increase or decrease the horizontal size of a pane, position your cursor on the free edge (a side that is available to move) of the pane, your cursor will change to a horizontal double arrow

( ). Left click and drag the edge to the horizontal position you want. Once the ellipses are no longer displaying, all the data in the pane can be seen.

Access the Brief It dialog pane in Edit. Press **Alt + v, e, t** (**View/Panes/Brief It**). The Brief It dialog pane can be set to float or be docked anywhere on the screen.

**Brief It Dialog Pane**

The briefs in the dialog pane have a color-coded background for easy identification. The more often the same brief is offered and not used, the darker the background color.

Brief It dialog pane colors include:

•Green — indicates a Reminder brief. This is a brief that exists in a dictionary being used for translation.

•Yellow — indicates a Suggested brief. This is a brief Case CATalyst generates.

•Orange — indicates a Personal brief. This is a brief you created and entered in the Briefs.txt file.

•Gray — indicates a Used brief. This is any type of brief displayed in the Brief It dialog pane you used in this job.

•White with strike out — indicates a Rejected brief. A rejected brief occurs when you use the Reject Suggestion or New Suggestion command.

## Brief Details

Rest the cursor on an entry in the dialog box to display information about the brief, including the type of brief, the steno and text contained in the brief, and how often the brief has been suggested in this job.

Right click a single entry in the Brief It dialog pane to take an action on the brief. Available actions depend on the type of brief selected. To take an action on multiple entries at once, use Windows conventions to highlight multiple briefs. Only actions applicable to all the selected entries are available. For example, if you highlight a Reminder brief and a Suggested brief, the only feature available is, Send to Cat Scratch. If you highlight several Suggested briefs, the available actions include, Send to Cat Scratch, J-define Suggestions, Reject Suggestions and New Suggestions.

Entry Type

Identifies the type of brief: Reminder, Personal, Suggested or Used.

Send to Case Cat Scratch

Depending on your Cat Scratch pane scope, Send to Job Cat Scratch, Send to Case Cat Scratch or Send to Cat Scratch displays.

Lookup Steno

Displays the entry in the dictionary where the existing brief entry is located. This action only displays for Reminder entries. The dictionary, that contains the entry, opens with the entry highlighted.

J-Define Suggestion

Create a J-Define from the brief. Displays the Add Dictionary Definition – Job Dictionary dialog box with the brief form in the Steno field and the definition in the Text field. This action is available for Suggested and Personal briefs.

If you have the Brief It Option, *Define to Case Dictionary,* selected, right click displays K-define Suggestions.

Reject Suggestion

Reject the Suggested brief. Case CATalyst strikes through the brief form, changes the background to white and makes the brief unavailable. When you use the reject suggestion command, the steno and text brief combination will not be suggested again during the current realtime session.This action is available for Suggested and Personal briefs.

New Suggestion

Automatically rejects the brief and suggests a new brief; or suggests a new brief for a brief already rejected. This action is available for Suggested and Personal briefs.

J-Define Rejection

Create a J-Define from a rejected brief. Displays the Add Dictionary Definition – Job Dictionary dialog box with the brief form in the Steno field and the definition in the Text field. This action only displays for rejected briefs.

DIALOG PANE FEATURES

Filter Type

Filter allows you to display the briefs by category or with specific criteria. Click the down arrow to select the type of entries to display. A check mark next to the item indicates it is selected to be included in the filter. Filter hides the display of specified items in the Brief It dialog pane. It does not remove them. All entries display when you return to Show All. By default, the Filter is set to Show All entries except Live Suggestions. Live Suggestions is a filter option that allows you to see Live Suggestions in the Brief It pane while you are writing realtime. In order to see Live Suggestions, this option must be selected.

If you write a brief generated by Brief It that is not displayed in the Brief It dialog pane because the Filter is hiding the entry, Case CATalyst job defines.

If you are showing Live Suggestions and the Rejected filter type is not selected, when you replace/define a Live Suggestion all the other Live Suggestions offered for that steno are no longer displayed in the Brief It pane. If the Rejected filter type is selected, when you replace/define a Live Suggestion all the other Live Suggestions offered for that steno are crossed out and display in the Brief It pane until the next Live Suggestion.

Print

Display the Print dialog box allowing you to print the list of briefs. If you select to print to PDF, by default Case CATalyst uses the current job name followed by "_Brief It.pdf". You can modify the name.

Select Font Type

Select a font type from the drop-down list to affect all the steno and text in the Brief It dialog pane. Depending on the font style selected, briefs in the Brief It pane may wrap. Two stroke briefs wrap the second steno stroke after the slash (/). If a format symbol exists, the text wraps after the format symbol.

Select Font Size

Select a font size from the drop-down list to affect all the steno and text in the Brief It dialog pane. Depending on the font style selected, briefs in the Brief It pane may wrap. Two stroke briefs wrap the second steno stroke after the slash (/). If a format symbol exists, the text wraps after the format symbol.

Options

Display the Realtime Aids Options dialog box which provides access to Brief It and Live Suggestions options. Brief It options allow you to customized settings that control how Case CATalyst suggests brief and Live Suggestions option allow you to customize the number of Live Suggestions that display, defined suggestions go to the job or case dictionary, etc.

Export to CSV

Allows you to export the contents (whatever type of briefs are displaying in the Brief It pane) to a CSV (comma separated value) file type which can be opened in Microsoft Excel or a compatible file type.

# CAT SCRATCH

The Cat Scratch dialog pane is designed to be a virtual scratch pad. You can add notes, names, job orders that you normally would jot down on paper or the job sheet to the Cat Scratch pane. The notes remain with the job and cannot become misplaced. In addition to personal notes, the Cat Scratch pane provides quick access to briefs, dictionary entries, power define definitions or newly created AccelerWriter definitions.

There are two sections to the Cat Scratch dialog pane. A Text section and a Text/Steno section. The Text section holds all text items without steno, such as copied or text typed directly into the Cat Scratch pane such as a name, transcript order instructions, terminology or anything you want to remember. The Text/Steno section holds all items containing text and steno that are sent to the Cat Scratch pane such as used briefs, sent briefs, most used Case dictionary entries, newly created AccelerWriters, Power Defines or manually selected dictionary entries. The Brief It option, Show Phonetic Steno, determines whether the steno displays in steno characters or the "phonetic" sound of the combined letters. For example, let's say you have the Show Phonetic Steno option selected and you write the phrase "large imbalances", Brief It displays the suggestion as "LARJ" instead of "HRARPBLG." And in the Steno field of the Text/Steno section, you would see "LARJ". And when you send that brief to the Cat Scratch pane, the steno displays as "LARJ" in the Text/Steno section.

Each section separately numbers items and is separately sortable by column. Click on a column heading to change the sort order. The Search features allows you to quickly locate specific items within a section. Pinning an item locks it to the top of the respective section for quick accessibility. Locked items do not scroll off the screen when more item are added to the Cat Scratch pane.

The availability of information in the Cat Scratch dialog pane for the job depends on the selected Cat Scratch scope: job, case or user. When the scope is set to job, items in the Cat Scratch pane are available for that job and the information is stored in the Job History. When the scope is set to Case, items in the Cat Scratch pane are available for any job related to the case and the information is stored in the Case History. When the scope is set to User, items in the Cat Scratch pane are available for all jobs in the current user and the information is stored in the User History, System Files_Case. Set the scope in Cat Scratch options. The default scope setting is Case. When the job is not in a case, the existing CAT Scratch information is available in the job. The Cat Scratch options affect both regular CATalyst translation and CATalyst BCS captioning.

Action commands in the Cat Scratch pane are available by right-clicking an item. You can insert text from the Cat Scratch pane into the job, case or your Personal Wordlist. Each word in the selected item is analyzed and sent to a wordlist only if it is not recognized. For example, you have "Susan Zorne." Susan is a recognized word, so it is not added to the wordlist. Zorne is not recognized so it is added. Other right-click commands allow you to insert the text portion of a steno/text entry into the transcript, add the entry to the job, case or Personal dictionary and suggest a brief for the selected entry, which is added to the Brief It pane. Available right-click actions depend on the item selected.

You can copy an individual item, multiple items or all the entries in the Cat Scratch pane from your job and paste them into the Cat Scratch pane of another job regardless of scope. For example, you are working on the RWAnderson case with the scope for the Cat Scratch pane set to Case. You work on this case for a week. You have various information such as names, addresses, dictionary definitions and briefs. Each day you open a new job file, the items in the Cat Scratch pane from the previous days are available. The next week you work on a new case, JDorsinski. You copy and paste selected new briefs from the RWAnderson Cat Scratch dialog pane to the Cat Scratch pane for the new case.

You can quickly send text from the transcript to the Cat Scratch pane by highlighting the text, right-clicking the mouse and selecting Send to Cat Scratch. The keyboard command, Send Steno & Text to Cat Scratch Pane, sends highlighted text with the underlying steno in the transcript to the Steno/Text section of the Cat Scratch pane. You must create a keyboard command to use this feature.

The Cat Scratch toolbar is customizable. Click the down arrow located on the right side of the toolbar. Select **Add or Remove Button** and choose the toolbar to modify. Click a command to show or hide it from the toolbar. A check mark indicates the icon shows on the toolbar.

You can increase or decrease the horizontal size of the pane. If you see information in the pane followed by ... (ellipses) it is an indication that there is more information or data to be shown. To increase or decrease the horizontal size of a pane, position your cursor on the free edge (a side

that is available to move) of the pane, your cursor will change to a horizontal double arrow ( ). Left click and drag the edge to the horizontal position you want. Once the ellipses are no longer displaying, all the data in the pane can be seen.

To display the Cat Scratch pane in Edit, press **Alt + v, e, c** (**View/Panes/Cat Scratch**).

Entry/Text

All text items without steno, such as transcript text sent to the Cat Scratch pane or typed text like a witness names, transcript order information or personal notes.

Entry/Text/Steno

All items containing text and steno that are sent to the Cat Scratch pane such as most used dictionary entries, briefs you want to remember or new AccelerWriters. The Brief It option, Show Phonetic Steno, determines whether the steno displays in steno characters or the “phonetic” sound of the combined letters. For example, let’s say you have the Show Phonetic Steno option selected and you write the phrase “large imbalances”, Brief It displays the suggestion as “LARJ” instead of “HRARPBLG.” And when you send that brief to the Cat Scratch pane, the Steno field of the Text/Steno section would display as "LARJ".

If you edit the steno field in Cat Scratch, the steno will temporarily change to all steno characters instead of phonetic. Once your edit is complete, the display changes back to phonetic if that Brief It option is selected.

Insert

Insert an item from the text section into the transcript. Position the cursor in the transcript where you want to insert the text. Highlight the Cat Scratch item and click the Insert icon or right-click and select **Insert**.

New

Create a new text item. A blank line displays where you can type the text.

Modify

Modify an existing item in the Text or Text/Steno section. Highlight the item and click the Modify icon. Type the new text or steno.

Delete

Delete an existing item in the Text or Text/Steno section. Highlight the item and press **Delete** or click the Delete icon. At the Delete confirmation message, press **Enter** to delete.

Copy

Copy an individual item, multiple items or all the entries in the Cat Scratch pane from one job and paste them into the Cat Scratch pane of another job. Use Windows conventions to highlight the desired items and click the Copy icon.

Paste

Paste copied items from another Cat Scratch pane into the current Cat Scratch pane.

Search

Search the Cat Scratch pane. Depending on your cursor focus, the Search looks in the Text or the Steno/Text section.

Pin/Lock

Highlight entries and click the Pin icon to lock the items at the top of their respective sections. Locked items do not scroll when other entries are added to the Cat Scratch pane. Locking items may be useful when you have key briefs or dictionary entries that you want displayed first. Use the Unpin icon to unlock an item.

Unpin/Unlock

Highlight entries and click the Unpin icon to unlock the items from the top of their respected section. Unpinned items display in the list with their original sorting number.

Add Most Used Dictionary Entries

Automatically copy the most used Case Dictionary entries to the Steno/Text section of the Cat Scratch dialog pane. The most used entries count is based on the Usage Count information in the Case Dictionary. For example, you have an on-going case in which two weeks passed since the last proceeding. As a quick reference to the way you wrote the most commonly used names and terminology in the case, you click the Add Most used Dictionary Entries icon. The most used entries in the Case dictionary automatically display in the Cat Scratch dialog pane. The number of entries that display is determine by the setting in Cat Scratch Options.

Font Type

Select a font type for all the characters in the Cat Scratch pane. This affects both sections.

Font Size

Determine the size of the font for all the characters in the Cat Scratch pane. This affects both sections.

Print

Print the items in the Cat Scratch dialog pane.

Options

Display the Cat Scratch Options dialog box to customize the options for the Cat Scratch dialog pane.

## Cat Scratch Options

Cat Scratch Scope

Determine the availability of information in the Cat Scratch dialog pane. This option is available from the Cat Scratch Options or Advanced Edit Options dialog box. Changing the option in one location changes it in the other location.

Select one of the following:

Case

Items in the Cat Scratch pane are available for any job related to the case and the information is stored in the Case History. The default scope setting is Case. When the job is not in a case, the CAT Scratch information is available in the job.

Job

Items in the Cat Scratch pane are available for that job and the information is stored in the Job History.

User

Items in the Cat Scratch pane are available for any job in the current user and the information is stored in the User History, System Files_Case.

Number of Case Dictionary entries to add

Specify the number of Case Dictionary entries to automatically add to the Cat Scratch dialog pane. Click the Add most used entries from case dictionary icon to automatically add the specified number of most used entries. Valid settings are 1 - 25. The default is 10.

Display text section first

Select **Yes** to display the text section first in the Cat Scratch pane. Select **No** to display the Steno/Text section first. Changing the setting applies to any new jobs opened in Edit. It does not apply the currently open file.

# SEARCH RESULTS

When you invoke a Search in Edit with the *List Search Results* option selected, Case CATalyst searches the transcript and automatically displays the results of the Search in the Search Results dialog pane. The text content, page, line and section reference display for each occurrence of the searched item. When performing a Wildcard or Regular Expression search with the List Search

Results option selected, the Wildcard and Regular Expression matches will be underlined. If you search for Q, A or Colloquy format symbols, the first letter following the format symbol will be underlined.

If you use the Mistran Minder feature, the Mistran Minder matches display in the Search Results pane and are underlined.

Double click an entry to move the cursor to that location in the current transcript. You can also use the Search Next and Previous Search Result to move your cursor from the current position in the transcript to the next occurrence.

To manually open the Search Result pane, press **Alt + v, e, s** (**View/Pane/Search Results**).

## Search Results Dialog Pane Features

Font Type

Select a font type for all the characters in the Search Results pane.

Font Size

Determine the size of the font for all the characters in the Search Results pane.

Print

Print the items in the Search Results pane.

# TRACK CHANGES

The Track Changes feature, when active, tracks non-global changes made to a transcript. The changes display in the body of the transcript when in Normal view and with the Display Changes feature selected. The Track Changes pane provides a summary of all the changes made while the Track Changes feature was active. The changed items can include deletions, inserts, including a file, replacing and adding spaces. To activate Track Changes while editing, select **Special Edit/Track Changes**.

Details for each change display in the Track Changes pane and are organized into three columns: Change, Page and Editor. Each change, except for deletions, display in the assigned color for the active editor. All deletions display in the assigned deletion color regardless of the editor. When replacing steno or text, the replaced item is considered deleted. Replacement text is considered an inserted change. Inserted and included text show editor color with the initial words followed by an ellipsis (...) and then the last words. Global definitions, undo last global, layout changes and filling in fields are not tracked, however, if you use the Undo Global Once command, the action is recorded a Replace. The display color for changes made with Undo feature depends upon the resulting action. For example, if you delete a word but then Undo it, the change displays in the editor color because Undo inserts the word back into the transcript. If you type a word and then Undo it, the change displays in the deletion color because the Undo removes the word from the transcript.

The current user name identifies the current editor of the tracked changes unless a name is specified in Application/Computer option, *Editor ID*. The *Editor ID* option allows you to specify an editor name. The editor name applies to all users on the system who select to use the Track Changes feature. If you are exchanging files with another Case CATalyst user, you can track the changes for the multiple editors. The first person that edits the file is Editor 1. The next person that edits the file is Editor 2. You can assign up to five editor colors. For example, Track Changes is active when the reporter makes small changes to the transcript before sending the transcript to the scopist. The change is recorded in the pane using the editor name and assigned color for Editor 1. The reporter sends the file to the scopist. The scopist becomes the second editor. Changes are recorded using their editor name in the assigned color for Editor 2. When the transcript is returned to the reporter, scopist changes are displayed in the Editor 2 color.

The changes in the pane are organized into three columns: Change, Page and Editor. Click a column heading to sort the entries in ascending and descending order. An arrow in the column indicates the sort order. Double click an entry to move the cursor to the location in the file where the selected edit occurs. When you Arrow Up and Arrow Down in the Track Changes pane, the cursor scrolls in the transcript, vertical notes pane and reveal codes pane.

The Track Changes default colors include:

•Pink — deleted item or item removed for a replacement.

•Light Green — inserted item or replacement item for Editor 1.

•Light Blue — inserted item or replacement item for Editor 2.

•Light Purple — inserted item or replacement item for Editor 3.

•Gray Row — current or last change location.

•Gray Column — sort column.

Filter

Display entries based on page number, the editor or changes. Click the Filter icon to display the Filter dialog box.

Remove Filter

Display all the entries.

Select Font Type

Select a font type from the drop-down list to affect all the steno and text in the pane. Depending on the font style selected, entries in the pane may wrap.

Select Font Size

Select a font size from the drop-down list to affect all the steno and text in the pane. Depending on the font style selected, entries in the pane may wrap.

Search

Search the entries . In the Search dialog box make necessary entries and press **Enter** (**OK**).

Print

Display the Print dialog box allowing you to print the list of changes. If you select to print to PDF, by default Case CATalyst uses the current job name followed by the text, "TrackChanges." For example, SMP122811_TrackChanges. You can modify the name.

Case CATalyst Help

Display the Case CATalyst help

Toolbar Options

Click the down arrow on the right side of the toolbar to add or remove icons from the dialog pane toolbar.

Display entries based on specific change, page number, editor, or entry type.

1.In the Track Changes dialog pane, click the Filter icon. The Filter dialog box displays.

2.Select a filter criteria from the drop down list.

Page #

All entries on a specific page. Type the page number in the field.

Editor

All entries for the specified editor. Type the name of the editor in the field.

Change

All entries for the specified change. Type the text.

Case Sensitive

Check this box to limit the filter based on the upper and lower case letters of text typed in the field. If you do not select Case Sensitive, the filter displays all words containing the indicated characters, regardless of case. This field is only available when filtering text.

Whole Word

Filter only for the words that match the text typed in the field. If you do not select Whole Word, the filter displays the word both as it stands alone and as part of another word. This field is only available when filtering by the typed text in the field.

Location

Filter by one of the following criteria. These fields are only available when filtering by text.

Exact Match

Filter entries that exactly match the text typed in the field.

Begins With

Filter for entries that begin with the text typed in the field.

Ends With

Filter entries that end with the text typed in the field.

Contains

Filter entries that contain, anywhere in the entry, the text typed in the field.

Search the Track Changes dialog pane for specific text. You can search forward or backward for a whole word, part of a word or multiple words. Once a searched entry displays, you can repeat Search for the same text and search parameters by using Repeat Search Forward or Repeat Search Backward.

To search entries:

1.In the Track Changes dialog pane, click the Search icon. The Search dialog box displays.

2.Select the method by which you want to search the entries.

3.In the *Search* field, type the text you want to find.

4.Use the remaining fields as necessary:

Case Sensitive

Check this box to limit the search based on the upper and lower case letters of text typed in the *Search* field. If you do not select Case Sensitive, the search finds all words containing the indicated characters, regardless of the case typed into the field. This field is only available when you select to search for text.

Whole Word

Search only for the words that match the text typed in the *Search* field. If you do not select Whole Word, the search finds the word both as it stands alone and as part of another word. This field is only available when you select to search for text.

Location

Limit the search to include one of the following criteria. These fields are only available when you select to search for text.

Exact Match

Search for entries that exactly match the text entered in the *Search* field.

Begins With

Search for entries that begin with the text entered in the *Search* field.

Ends With

Search for entries that end with the text entered in the *Search* field.

Contains

Search for entries that contain, anywhere in the entry, the text entered in the *Search* field.

Direction

Select one of the following:

Forward

Search forward from the cursor position to the end.

Backward

Search backward from the cursor position to the beginning.

5.Press **Enter** (**OK**) to start the search. If no match is found for the search item, a message displays.

6.To repeat the same search, press **F3** (**Edit/Repeat Search Forward**) or **Shift + F3** (**Edit/Repeat Search Backward**).

# CASEVIEWNET CONNECTED USERS

The CaseViewNet section of the Connected Users dialog pane displays the connection status of CaseViewNet/iCVNet users connected via a network connection (wireless or Ethernet cable)

and/or Cloud connection.
If there is a Cloud connection, a 'cloud' icon will display. User connection status includes connected with save rights, connected without save rights, disconnected and blocked information.

Connection details for each CaseViewNet user is viewable in the CaseViewNet Connected User dialog pane for the current session. Basic and Advanced Modes display detailed connection information in a message bubble that is available by resting the cursor on a user name. In Advanced mode, the information for each user also displays in columns. You can select which columns display and modify the display order.

Right clicking on a user name in the CaseViewNet Connected User dialog pane allows you to manage user connections. You can change the selected user's save rights or disconnect and block the connection making your Case CATalyst server inaccessible to the selected user. You might block a user when working in a courthouse. When you block a user, you can send a message explaining the reason. For example, you were in a courtroom yesterday where the judge received your wireless feed for the proceedings. Today you are in a different courtroom and the judge from yesterday automatically connects to you by mistake. You can block that judge from

connecting and send a message to explaining the reason for blocking.

A blocked CaseViewNet user will get a message stating the connection has been blocked and if the reporter wrote message as to why the user was blocked, that information will display. An iCVNet user will not get a blocked message but they will immediately be disconnected and will not be able to connect until the reporter unblocks the user.

To open the CaseViewNet Connected User dialog pane in the Case CATalyst realtime session, press **Alt + v, a, u** (**View/CaseView Options/CaseView Connected Users**).

CASEVIEWNET USER INFORMATION

Connection Status

Connected

The user is connected to the current CaseViewNet session with save rights as indicated by a floppy disk icon ( ) or no save rights as indicated by a floppy disk icon with a red X ( ).

Disconnected

The user was connected to the current session but is not connected at this time.

Blocked

The user is blocked by the court reporter and cannot connect to the CaseViewNet session as indicated by a user icon being moved under the heading Disconnected and the icon marked with a red X.

The CaseViewNet Dialog pane displays connection information in either Basic or Advanced mode.

Basic Mode

The CaseViewNet Connected User dialog pane, by default opens in Basic Mode with users grouped by connection status, Connected, Disconnected and Blocked. Click on the plus sign

next to the status heading to expand or collapse the list of user names. You can sort by name within each group. Case CATalyst identifies the sort column with a triangle to the right of the column heading. Click the Name column heading until the triangle points up for ascending order or down for descending order.

Each user name displays with an icon, indicating their current save rights. These include:

- Save Rights - A diskette icon before the user's name indicates the CaseViewNet user has the ability to save CaseViewNet file.

- No Save Rights - A diskette with a red X icon before the user's name indicates the CaseViewNet cannot save the CaseViewNet file. The client <u>can</u> save a report that includes page and line number references for their marks, issue codes and their notes.

- Blocked - A red X on top of a silhouette icon before the user's name and the user name with a line through it indicates the CaseViewNet user is disconnected from the CaseViewNet session and is blocked from connecting.

Advanced Mode

The Advanced Mode contains additional options that allow you to group users by various connection details. Use the following options as necessary:

Filter

Filter allows you to display users by specific criteria contained in the entries. Type the criteria by which you want to filter. Filter hides the display of items not specified. It does <u>not</u> remove them. All entries display when you remove the typed entry. For example, to filter all users that have Save rights, type **save** in the Filter field. Switching to Basic Mode removes the text from the Filter field.

Column List

Display the Column Chooser dialog box where you can click and drag a heading to the CaseViewNet Connected User dialog pane. Position the heading as a column to display the indicated information for each user or position the heading in the Advanced Grouping field to create a grouping.

## Advanced Grouping

Display the Advanced Grouping field where you can create groups and subgroups by which you can sort the users by various connection details. Click the Column List icon to display the Column Chooser dialog box and drag a heading from the list to the Advanced Grouping field located above the user list. For example, you can create a group by all users with save rights based on the current connection status.

To remove the groups and subgroups, click the column list names in the CaseViewNet Connected User dialog pane and drag them out of the dialog pane.

Position the cursor on a user name and right click. Select one of the following actions from the menu.

Has Save Rights

Change the current save rights for the selected user. Right click the user name. A check mark displays next to the option, *Have Save Rights, w*hen the selected user currently has save rights. If the user does not have save rights, no check mark displays. Click **Have Save Rights** to permit or revoke the user's current rights status. CaseViewNet users will not be able to save the transcript except for marks and notes the user made. iCVNet users will not be able to e-mail the transcript.

A floppy disk icon (      ) next to the user name indicates they have save rights. A floppy disk icon with a red X (      ) indicates they do not have save rights.

Block User

Block and disconnect the selected user. Right click the user name and select **Block User**. A check mark before the option indicates the user is blocked. When you block a user, the Block CaseViewNet User dialog box displays in Case CATalyst indicating you are blocking the user and provides the opportunity to include a message. If desired, type a message to the CaseViewNet user explaining the reason for blocking the connection. For example, “Please connect to the Linda Server, she is your court reporter today.” When finished typing your message, click **Block & Logoff User** to active the block. When Case CATalyst blocks the user, a blocked connection message displays in CaseViewNet along with the reporter's message, if applicable.

To remove the block and allow connection for a selected user, right click the user name and click **Block User**. No check mark displays in front of the option when a user has an active CaseViewNet connection. When removing the block, it is necessary for the CaseViewNet user to reconnect in order to receive the realtime transcript. iCVNet users will not be able to connect or receive the realtime feed until they are unblocked. The iCVNet iPad will not indicate that it is blocked.

When using the Block feature with a version of CaseViewNet other than 2.1.1 or higher, the CaseViewNet user does not receive get the blocked message. The CaseViewNet user is disconnected and the Login dialog box displays. If the user attempts to reconnect, the Login dialog box displays.