

# REALLEGAL E-TRANSCRIPT BUNDLE VIEWER

## USER GUIDE

Version 6.9  
May 2024



# Customer Service

---

## Technical Assistance

If you have general, research, or technical questions about RealLegal E-Transcript Bundle Viewer, call Customer Technical Support at 1-800-290-9378, or send an email to [RealLegalSupport@thomsonreuters.com](mailto:RealLegalSupport@thomsonreuters.com). You can also visit our contact page at <https://legal.thomsonreuters.com/en/support>.

If you are researching an area of law you are unfamiliar with, it's not without its speed bumps. That's why we offer our customers free, unlimited, 24/7 access to Reference Attorneys, the industry's premier team of legal research assistance professionals. For research help, call the Reference Attorneys at 1-800-REF-ATTY (1-800-733-2889).

## Billing and Account Assistance

For billing and account assistance, call Customer Service at 1-800-328-4880 or email [customerservice@thomsonreuters.com](mailto:customerservice@thomsonreuters.com). Billing and account assistance is also available online at <https://legal.thomsonreuters.com/en/support>.

## Reference Materials

For free reference materials, visit the Product support section at <https://legal.thomsonreuters.com/en/support> or <https://legal.thomsonreuters.com/en/products/reallegal>.

Our products also contain comprehensive, searchable instruction available via the **Help** menu in the application.

## Disclaimer

Thomson Reuters disclaims any and all liability arising from the use of this document and does not guarantee that any information contained herein is accurate or complete. This document contains information proprietary to Thomson Reuters and may not be reproduced, transmitted, or distributed in whole or part, in any form or by any means, without the express written permission of Thomson Reuters.

The example companies, organizations, products, domain names, email addresses, logos, people, places, and events depicted herein are fictitious. No association with any real company, organization, product, domain name, email address, logo, person, place, or event is intended or should be inferred.

Information in this guide is current through May 2024 (version 6.9). L-391326  
Westlaw, Case Notebook, RealLegal, E-Transcript, E-Transcript Bundle Viewer, KeyCite, LiveNote,  
LiveNote Stream, RealLegal iBinder, RealLegal MediaSync, E-Transcript Manager,  
E-Transcript Reporter Edition are either registered trademarks or trademarks of Thomson Reuters in the  
United States and/or other countries. Other product and company names mentioned herein may be the  
trademarks of their respective owners.

# Contents

---

<b>1</b>	<b>ABOUT E-TRANSCRIPT BUNDLE VIEWER .....</b>	<b>1</b>
<b>2</b>	<b>WORKING WITH THE BUNDLE VIEWER .....</b>	<b>2</b>
	Opening E-Transcript Files, Bundles, and Portable Exhibit Files.....	2
	Viewing Cover Pages, Errata Sheets, and Witness Certificates .....	2
	Viewing Property and Signature Information .....	2
	Viewing Bundle Properties .....	2
	Viewing Transcript Properties .....	2
	Viewing Document Properties.....	2
	Viewing Signature Information .....	3
	Setting Options .....	3
	Transcript.....	3
	Word Index.....	3
	Save As.....	3
	Navigating in Transcripts.....	3
	Working with a Word Index .....	4
	Show/Hide the Word Index .....	4
	Search for a Word or Number Using the Word Index.....	4
	Go to a Search Term in a Transcript .....	4
	Working with Synchronized Video .....	4
	Play Synchronized Video.....	4
	Working with Video and Video Clips .....	4
<b>3</b>	<b>PRINTING TRANSCRIPTS AND DOCUMENTS.....</b>	<b>5</b>
	Print a full-sized or condensed transcript, word index, cover page, errata sheet, or witness certificate.....	5
	Page Setup .....	5
	Page Setup Options .....	5
	Full-sized Transcript Print Options.....	5
	Page .....	6
	Border.....	6
	Text.....	6
	Numbering.....	6
	Advanced .....	7
	Condensed Transcript Print Options .....	7
	Page .....	7
	Border.....	7
	Text.....	7
	Numbering.....	8
	Condensed .....	8
	Advanced .....	8
	Word Index Print Options .....	9
	Page .....	9
	Border.....	9
	Word Index.....	9
	Numbering.....	9
	Cover Page Print Options .....	9
	Page .....	10
	Border.....	10
	Errata Sheet Print Options .....	10
	Page .....	10
	Border.....	10
	Witness Certificate Print Options.....	10

Page .....	10
Border.....	10
Full-sized Document Print Options.....	10
Page .....	10
Border.....	11
Numbering.....	11
Condensed Document Print Options.....	11
Page .....	11
Border.....	11
Numbering.....	11
Condensed.....	11
Previewing a Transcript or Document and Modifying Print Settings Before Printing.....	12
<b>4 ABOUT SAVING.....</b>	<b>13</b>
Saving Bundles.....	13
Saving Transcripts.....	14
Saving Documents .....	15

# 1 About E-Transcript Bundle Viewer

---

E-Transcript Bundle Viewer allows anyone to view transcripts, exhibits, and video created with the RealLegal line of products.

Use E-Transcript Bundle Viewer to open and work with E-Transcript .ptx files, E-Transcript .ptz Bundles and related exhibits, and Portable Exhibit .pex files.

No subscription is required to download and use this free software.

The software can be downloaded here:

<https://legal.thomsonreuters.com/en/support/software-downloads/reallegal/e-transcript-bundle-viewer>

Version number, copyright information, support contact information, and registration information for your copy of E-Transcript Bundle Viewer can be viewed by clicking the **Help** menu and selecting **About RealLegal E-Transcript Bundle Viewer**.

## 2 Working with the Bundle Viewer

---

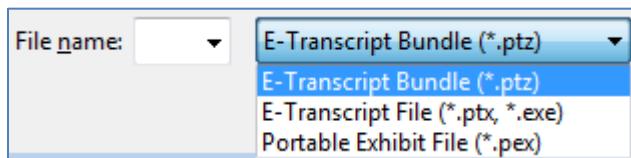
Use E-Transcript Bundle Viewer to open and work with:

- E-Transcript files (.ptx or .exe): Files created using E-Transcript Manager.
- E-Transcript Bundles (.ptz): Bundles created with Publisher. Bundles can contain documents, transcripts, and synchronized video information (i.e. if a transcript has been synchronized with a video and the video is available to your computer, you can watch the video while the transcript scrolls in sync with the video). You can also make video clips of the testimony and export them to PowerPoint. For more information, see "Working with Synchronized Video" on page 4.
- Portable Exhibit Files (.pex): Files (frequently an exhibit) created by a Thomson Reuters application, for example, Westlaw Case Notebook.

### Opening E-Transcript Files, Bundles, and Portable Exhibit Files

Double-click on a supported file type received from your agency to open the file in E-Transcript Bundle Viewer. Open files from within E-Transcript Bundle Viewer:

1. Click the **File** menu and select **Open**.
2. Select the file type to search for using the file of type field at the bottom of the dialog.



3. Select the file and click **Open**.

**Note:** If a dialog displays prompting you to enter a password or obtain an unlock code, contact the reporter who sent you the transcript.

### Viewing Cover Pages, Errata Sheets, and Witness Certificates

View cover pages and errata sheets in the E-Transcript Bundle Viewer by clicking the **View** menu and selecting one of the following options:

- **Bundle Cover Page:** View the cover page for a bundle, if present. The bundle cover page includes contact information for the court reporter, as well as the version and date. The version and date update each time you save the bundle.
- **Transcript Cover Page:** View the cover page for a transcript, if present.
- **Errata Sheet:** View the errata sheet for a file, if present.
- **Witness Certificate:** View the witness certificate for a file, if present.

### Viewing Property and Signature Information

View the properties for bundles, transcripts, or documents. Properties information displayed was added by the file creator. If no information is available, it was not added by the file's creator/editor.

#### VIEWING BUNDLE PROPERTIES

View the properties for a bundle (plaintiff, defendant, case title, matter #, case type, client, reference) by clicking the **File** menu and selecting **Properties**. Alternatively, click the **Properties** toolbar button (  **Properties** ) on the main toolbar.

#### VIEWING TRANSCRIPT PROPERTIES

View the properties for a transcript (type of transcript, status, last and first name of witness, volume number of the transcript, date of the proceeding, title of the transcript, the taking attorney/deposing attorney, who the transcript was taken for, comments, and electronic signature information) by clicking the **Properties** toolbar button (  **Properties** ) in the transcript viewing window. Alternatively, right-click on a transcript and select **Properties**.

#### VIEWING DOCUMENT PROPERTIES

To view the properties of a document (title, type, author, recipient, bates range, document date, OCR information), right click on the document in the Navigation pane and select **Properties**.

## VIEWING SIGNATURE INFORMATION

Electronic or digital signatures often refer to signing your name electronically on a computer form using a mouse. In RealLegal E-Transcript applications, a digital signature instead refers to a method for authenticating that a transcript was created electronically on a certain date, by a certain person, and that measures have been taken to protect the authenticity of the transcript. Signed transcripts display with a signed icon (✓) to the right of the transcript name in the Navigation pane. From within the properties dialog, click the **Signature** button to view and verify the authenticity of a signature on a signed transcript.

- Click **Verify Signature** to view the status of a signature.
- Click **Certificate Page** to view the certificate page.
- If a transcript has been signed by multiple parties, click **Signature 2** to view the status of a second signature.

You can also view a signature by clicking the **View** menu and selecting **Signature**.

## Setting Options

Set options that affect the display of transcripts, printing, and save as. Click the **Tools** menu and select **Options**.

### TRANSCRIPT

Set display and print options for transcripts.

- **Transcript Bolding:** Define font characteristics for questions and answers. Select an option for Question, Answer, and Text bolding in the display. Selecting **No Bolding** ensures questions, answers, and text are not displayed in bold.
- **Transcript Timestamps:** Enable the **Show timestamps if available** option to display the timestamps.
- **Print Settings:** In most cases, the original writer/court reporter establishes the page setup and sends the transcript you, who then uses the writer/court reporter's print settings. Occasionally, however, you may choose to customize your print settings. Disable the **Use court reporter settings if present** option to use your own page setup settings. Note, if this option is enabled and the writer/editor of the transcript attached a cover page to the transcript, the cover page will always print with the transcript, even if you attempt to disable printing of the cover page in Page Setup.
- **Clipboard Copying:** Enable options to **Include page and line numbers from the transcript** and/or **Include citation** (the name of the transcript and page range) when copying and pasting text from a transcript.

### WORD INDEX

Set display options for the Word Index.

- **Show Preview:** Enable this option to initiate a pop-up display of the indexed word in context upon mouse hover. Enable the **QA Pair** option to display the full question and answer in which the word is mentioned. Enable the **Number of lines above and below** to display a defined number of lines of text above and below the indexed word.
- **Display Word Index:** Enable the display of the Word Index in **Transcripts** and/or **Documents**.

### SAVE AS

Publisher 4.0 requires that imported bundles are in .pdf or .tiff format. Set save as options for 4.0 Bundle PDF Files.

- **Convert scanned PDFs using raw image extraction:** Select this option for PDFs exported from scanned documents or images. The first image from each page is saved in its original format (e.g. .jpg or .tiff).
- **Convert text-generated PDFs by printing to a file:** Select this option for PDFs created from a word processing application or other non-scanned source. Each page is saved as a separate .jpg or .tiff image. Select the image type (JPEG or TIFF), color format (color, grayscale, or monochrome), image resolution (DPI), and image quality (format) using the drop-down fields provided.

## Navigating in Transcripts

Go to a specific page in an open file by clicking the **File** menu, selecting **Go To**, and typing a page number in the field provided. Alternatively, access the **Go To** feature by clicking **Ctrl+G** on your keyboard.

Search for every occurrence of a specific word or phrase in an open file by clicking the **Edit** menu, selecting **Find**, and typing the search term in the field provided. Alternatively, access the Find feature by clicking **Ctrl+F** on your keyboard. To find the next occurrence of the term **click** **Edit** and select **Find Next** or click **F3** on your keyboard. To return to the previous occurrence of the term, click **Edit** and select **Find Previous** or click **Shift+F3** on your keyboard.

Use the **View** menu, **Zoom** and **Rotate** options to work with the display.

## Working with a Word Index

An E-Transcript Bundle Viewer Word Index lists every word in the transcript alphabetically with the page, and if applicable, line number on which that word occurred. A Word Index provides the ability to quickly locate key words and cross-reference them to other occurrences of that word in the transcript. You can click a page:line number in the Word Index go to the location of that word in the transcript text. E-Transcript Bundle Viewer automatically filters out common words like "a", "the", and "that" from the word index.

### SHOW/HIDE THE WORD INDEX

To view a word index in the E-Transcript Bundle Viewer, click the **View** menu and enable the **Word Index** option. To hide the Word Index, disable it using the **View** menu, **Word Index** option. If the Word Index is enabled in the view but not displaying, ensure it is not minimized to the side of the view (click and drag on the right side of the transcript view to expand/collapse the Word Index view).

### SEARCH FOR A WORD OR NUMBER USING THE WORD INDEX

Above the Word Index in the view, type a term or number into the field provided to search for that term or phrase in the transcript. The term or number and its corresponding page and line numbers display in the Word Index pane. The search field will retain recent searches for quick access. Use the drop-down arrow next to the field to access recent searches.

### GO TO A SEARCH TERM IN A TRANSCRIPT

Click the page and line number beneath the word in the Word Index. The corresponding word or number displays in the current transcript.

## Working with Synchronized Video

Bundles with synchronized video display with a video icon (camera) next to them in the Navigation pane. In order to view the video:

- The video needs to be synchronized with the transcript.
- The video needs to be accessible from your computer. Contact your court reporter to obtain synchronized video.

### PLAY SYNCHRONIZED VIDEO

1. Double-click the video icon (camera) next to the bundle in the Navigation pane.
2. The first time you launch a video, you will be prompted to locate the video. Click the **Browse** button to navigate to the video (it must be accessible from your computer - contact your court reporter to obtain synchronized video).
3. Select the video and click **Open**. The video will open in the Navigation pane and begin playing in sync with the transcript.
4. Use the **Play**, **Pause**, **Stop**, **Volume control**, and **View Full Screen** options to control the video playback.

**Note:** You can click on a specific page or line in the transcript text to start the video playback at the selected page or line. On a transcript open in the Display pane, right-click anywhere in the transcript and select **Play Video** to begin video play at that point. The video will open in the Navigation pane and begin playing in sync with the transcript.

### WORKING WITH VIDEO AND VIDEO CLIPS

Enable/disable the video player by clicking the **View** menu and selecting **Video Player**.

Video clips you create will be displayed in the Navigation pane under the **Video Clips** list.

- Select text from a transcript and click the **Create Video** toolbar button (camera) to create a video clip and place it in the **Video Clips** list.
- Click the **Properties** toolbar button (document) to change the Description for the selected video clip in the **Video Clips** list.
- Click the **Remove** toolbar button (X) to remove the selected video clip in the **Video Clips** list.
- Click the **Play** toolbar button (play) to play the selected video clip in the **Video Clips** list.
- Click the **Save** toolbar button (disk) to export the selected video clip from the **Video Clips** list to a video .mpg or as a PowerPoint file that includes transcript text. After clicking **Save**, use the **Save as type** drop-down field to select .mpg or PowerPoint as the file type. You can select multiple clips and save them together. When saving as PowerPoint, it is recommended that you select brief excerpts of testimony for export. Long excerpts may run off the page of PowerPoint slides. If you need extended Q&A pairs, it is recommended that you create several short clips and save them all at the same time. In this case, E-Transcript Bundle Viewer creates a new slide in PowerPoint for each clip you save. You can also select an existing PowerPoint presentation and append videos to that presentation during save.

# 3 Printing Transcripts and Documents

---

There are numerous print and preview options in E-Transcript Bundle Viewer. You can:

- Set print layout options.
- Preview any document before printing it.

## Print a full-sized or condensed transcript, word index, cover page, errata sheet, or witness certificate

1. Select a transcript to print, click the **File** menu, select **Print**, and select a print option. If an option is gray, it means there is no document of that type attached to the selected transcript.  
**Note:** If a dialog displays prompting you to enter a password or obtain an unlock code, contact the reporter who sent you the transcript.
2. Select a printer from the options. You can also enable manual duplexing options here.  
**Note:** If you need to read and sign a witness certificate, choose PDF as the printer from the options. Then use the 'Fill and Sign' feature in PDF to electronically sign the witness certificate and send it to the reporter via email.
3. Click **OK**.

## Page Setup

Format the printed layout of a document or transcript using the **Page Setup** options. In most cases, the original writer/court reporter establishes the page setup and sends the transcript to you, who then uses the writer/court reporter's settings. Occasionally, however, you may choose to customize your print settings. You can open a transcript in RealLegal E-Transcript Bundle Viewer, click the **Tools** menu, select **Options**, select the **Transcript** tab, and disable the **Use court reporter settings if present** option to use your own page setup settings.

Select the transcript or document you want to format from the Navigation pane, click the **File** menu, select **Page Setup**, then select one of the following items to set up:

- "Full-sized Transcript Print Options" on page 5
- "Condensed Transcript Print Options" on page 7
- "Word Index Print Options" on page 9
- "Cover Page Print Options" on page 9
- "Errata Sheet Print Options" on page 10
- "Witness Certificate Print Options" on page 10
- "Full-sized Document Print Options" on page 10
- "Condensed Document Print Options" on page 11

## PAGE SETUP OPTIONS

Page setup options differ depending on the page type. The tab options may include:

- **Page:** Set margins, customize headers and footers, and enable cover page printing options.
- **Border:** Enable external and/or internal borders. External borders are page borders, they print around the edges of transcript pages. Internal borders are borders between condensed pages and between Word Index columns.
- **Word Index:** Define the number of columns, the font characteristics, the display of the Word Index (for Word Index option only), and the page numbering for the **Word Index**.
- **Text:** Define font characteristics for transcript pages, questions, and answers.
- **Numbering:** Define font characteristics and display of page numbers, line numbers, and timestamps.
- **Condensed:** Define font characteristics, display, and layout of condensed pages.
- **Advanced:** Append a Word Index, define advanced transcript spacing, print a unique transcript identifier on each page, select options for displaying signatures, and create PDF bookmarks from a linked Word Index (full-size only).

## Full-sized Transcript Print Options

To format the printed layout of a full-sized transcript, select the transcript you want to format from the Navigation pane, click the **File** menu, select **Page Setup**, select **Transcript**, then select **Full-sized Transcript**.

## PAGE

Set margins, customize headers and footers, and enable cover page printing options.

- **Margin Settings:** Designate margin type. Select an automatic setting from the drop-down list or select **Custom** to designate your own margins in the Left, Right, Top, or Bottom fields (note that 0.5 =  $\frac{1}{2}$  inch).
- **Header and footer:** Customize the header and footer. Select a font type and size from the drop-down lists. Enable the **Bold** option to print the headers and footers in bold text.
- **Print cover page if available:** Enable this option to print the cover page. Enable the **Print blank page after cover if printing duplex** if you want the back of the cover page to be blank when you duplex print (page 1 of the transcript prints on the front of the next page rather than on the back of the cover page). To override printing a cover page, you must disable this option AND click the **Tools** menu, select **Options**, and disable the **Use court reporter settings if present** option.

## BORDER

Enable external borders. External borders are page borders, they print around the edges of transcript pages.

- **Style:** Select the style for the border. Enable borders on the left, right, top, and/or bottom of the page. Enable the **Shadow** option to print a shadow on the right and bottom of the page.

## TEXT

Define font characteristics for transcript pages, questions, letters, and answers.

- **Font:** Define font characteristics. Select a font type and size from the drop-down lists. It is recommended that you select a fixed-width (a.k.a. monospace) font like Courier New for full-sized pages to avoid alignment problems. Enable the **Bold** option to print the transcript in bold text.
- **Expand font by:** Add space between letters, expanding the length of the line.
- **No header/footer first page:** Prevent the header and footer from printing on the first page.
- **Line numbers in margin:** Print the line numbers in the margin rather than as part of the text of each line. Line numbers will print outside the border, if one exists.
- **Spacing:** Define the line spacing. Selecting **Double-spacing** inserts a blank line between each line of text. Selecting **Use full page height** will fill the entire page with text.
- **Alternate font pages:** Define fonts for certain pages. Select a font type and size from the drop-down lists. Enable the **Bold** option to print the alternate pages in bold text. Enter page numbers in the **First and the last pages** fields. For example, if you want the first two pages and the last page to print as alternate font pages, type 2 in the first blank space and 1 in the second blank space.
- **Q/A bolding:** Define font characteristics for questions and answers. Also select speaker bolding options. Select an option from the drop-down list. Selecting **<none>** ensures neither questions nor answers are bold. Selecting a **Letter** option will make the letter **Q** and/or **A** bold. Enabling the **Speaker bolding** option allows you to set the speaker or the speaker plus text as bold. For example, when attorneys are speaking with the judge.

## NUMBERING

Define font characteristics and display of page numbers, line numbers, and timestamps.

- **Page numbers:** Select a font type and size for the page numbers from the drop-down lists. Enable the **Bold** option to print the numbers in bold text.
- **Align (page numbers):** Designate where to print the page number. Click **<None>** for no page numbers. Select **In Text** to print the page numbers within the borders of the page. Click **In Margin** to print the page numbers within the margins but outside of the borders of the page.
- **Numbering options:** Select options to **Print the page number in brackets** (e.g. [1]), **Print 'Page' with Page number** (e.g. Page 1), **Swap sides on even-numbered duplex pages** (i.e. print the page numbers on the outside edge of each page when duplex printing), and/or **Inside header/footer** to print the page number in the header/footer.
- **Line numbers:** Select a font type and size for the line numbers from the drop-down lists. Enable the **Bold** option to print the numbers in bold text. Enable the **Line numbers in parentheses** to print the line numbers in parentheses (e.g. (1)). Type numbers in the **Skip first \_ and the last \_ pages** fields to keep line numbers from printing on the designated pages. For example, to have the first two pages and the last page print without page numbers, type 2 in the first blank space and 1 in the second blank space.
- **Timestamps:** Select a font type and size for the timestamps from the drop-down lists. Enable the **Bold** option to print the timestamps in bold text.
- **Align (timestamps):** Designate where to print the timestamp. Click **<None>** for no timestamps. Select **In Text** to print the timestamps within the borders of the page. Click **In Margin** to print the timestamps within the margins but outside of the borders of the page.

## ADVANCED

Append a Word Index, define advanced transcript spacing, print a unique transcript identifier on each page, and select options for displaying signatures.

- **Append word index:** Print the Word Index at the end of the transcript.
- **Advanced transcript spacing:** Define the vertical space to add (in 1/2 points) below the header and above the footer and/or define the horizontal space to add (in characters) between the line numbers and the transcript text.
- **Unique transcript identifier:** Print a unique identifier at the bottom of each page. Signed transcripts always print the unique identifier. The unique identifier will also print if the **Print signature details at bottom of every page** option is enabled.
- **Signed transcripts:** Select signature printing options for signed transcripts (see "Viewing Property and Signature Information" on page 2 for more information). The optional signature seal is provided by E-Transcript Manager and is displayed here:



## Condensed Transcript Print Options

To format the printed layout of a condensed transcript, select the transcript you want to format from the transcript list, click the **File** menu, select **Page Setup**, select **Transcript**, then select **Condensed Transcript**.

### PAGE

Set margins, customize headers and footers, and enable cover page printing options.

- **Margin Settings:** Designate margin type. Select an automatic setting from the drop-down list or select **Custom** to designate your own margins in the Left, Right, Top, or Bottom fields (note that 0.5 = ½ inch).
- **Header and footer:** Customize the header and footer. Select a font type and size from the drop-down lists. Enable the **Bold** option to print the headers and footers in bold text. If desired, enable the option to print the header and footer on each condensed page.
- **Print cover page if available:** Enable this option to print the cover page. Enable the **Print blank page after cover if printing duplex** if you want the back of the cover page to be blank when you duplex print (page 1 of the transcript prints on the front of the next page rather than on the back of the cover page). To override printing a cover page, you must disable this option AND click the **Tools** menu, select **Options**, and disable the **Use court reporter settings if present** option.

### BORDER

Enable external and/or internal borders. External borders are page borders, they print around the edges of transcript pages. Internal borders are borders between condensed pages and between word index columns.

- **Style:** Select the style for the borders. Enable external borders on the left, right, top, and/or bottom of the page. Enable the **Shadow** option to print a shadow on the right and bottom of the page. For the internal border, select a style (none, thin, single, or thick) to display a border between condensed pages.

### TEXT

Define font characteristics for transcript pages, questions, letters, and answers.

- **Font:** Define font characteristics. Select a font type and size from the drop-down lists. It is recommended that you select a proportional font like Times New Roman for full-sized pages to avoid alignment problems. Enable the **Bold** option to print the transcript in bold text.
- **Expand font by:** Add space between letters, expanding the length of the line.
- **No header/footer first page:** Prevent the header and footer from printing on the first page.
- **Line numbers in margin:** Print the line numbers in the margin rather than as part of the text of each line. Line numbers will print outside the border, if one exists.

- **Spacing:** Define the line spacing. Selecting **Double-spacing** inserts a blank line between each line of text. Selecting **Use full page height** will fill the entire page with text.
- **Alternate font pages:** Define fonts for certain pages. Select a font type and size from the drop-down lists. Enable the **Bold** option to print the alternate pages in bold text. Enter page numbers in the **First and the last pages** fields. For example, if you want the first two pages and the last page to print as alternate font pages, type 2 in the first blank space and 1 in the second blank space.
- **Q/A bolding:** Define font characteristics for questions and answers. Also select speaker bolding options. Select an option from the drop-down list. Selecting **<none>** ensures neither questions nor answers are bold. Selecting a **Letter** option will make the letter **Q** and/or **A** bold. Enabling the **Speaker bolding** option allows you to set the speaker or the speaker plus text as bold. For example, when attorneys are speaking with the judge.

## NUMBERING

Define font characteristics and display of page numbers, line numbers, and timestamps.

- **Page numbers:** Select a font type and size for the page numbers from the drop-down lists. Enable the **Bold** option to print the numbers in bold text.
- **Align (page numbers):** Designate where to print the page number. Click **<None>** for no page numbers. Select **In Text** to print the page numbers within the borders of the page. Click **In Margin** to print the page numbers within the margins but outside of the borders of the page.
- **Numbering options:** Select options to **Print the page number in brackets** (e.g. [1]), **Print 'Page' with Page number** (e.g. Page 1), **Swap sides on even-numbered duplex pages** (i.e. print the page numbers on the outside edge of each page when duplex printing), and/or **Inside header/footer** to print the page number in the header/footer. Enter a number in the **Do not display page numbers on the first \_ pages** field to keep page numbers from printing on the designated first few pages.
- **Line numbers:** Select a font type and size for the line numbers from the drop-down lists. Enable the **Bold** option to print the numbers in bold text. Enable the **Line numbers in parentheses** to print the line numbers in parentheses (e.g. (1)). Type numbers in the **Skip first \_ and the last \_ pages** fields to keep line numbers from printing on the designated pages. For example, to have the first two pages and the last page print without page numbers, type 2 in the first blank space and 1 in the second blank space.
- **Timestamps:** Select a font type and size for the timestamps from the drop-down lists. Enable the **Bold** option to print the timestamps in bold text.
- **Align (timestamps):** Designate where to print the timestamp. Click **<None>** for no timestamps. Select **In Text** to print the timestamps within the borders of the page. Click **In Margin** to print the timestamps within the margins but outside of the borders of the page.

## CONDENSED

- **Font:** Define font characteristics. Select a font type from the drop-down list. Set the number of condensed pages to print on each sheet of paper and the layout order (vertical or horizontal) for condensed pages.
- **Numbers:** Indicate the location to print page numbers. You can indicate the location to print: numbers on each page, numbers on each sheet (the **order** of the page numbers - this is in addition to the page numbers on each condensed page), and/or the **range** (e.g. 2-5) on each full sized page of condensed pages. Select **<None>** to disable any or all options.
- **Print these pages full sized:** Print designated pages in full-sized. For example, to print the first 2 pages (perhaps a cover page and a blank page) and the last 3 pages full-sized instead of condensed, type **2** and **3** in the fields provided. You can also select to print all unnumbered pages in full size or prevent any pages from printing full sized (select **None**).
- **Space for handwritten notes:** Select a location for handwritten notes (**No Notes Space**, **Interleaved Notes**, **Right Column**, **Notes Across Bottom**, **Bottom Right**). If you do not want a designated space for handwritten notes, select the **No Notes Space** option. Enable the **Add center column note space** option to create a center column space for handwritten notes.

## ADVANCED

Append a Word Index, define advanced transcript spacing, print a unique transcript identifier on each page, and select options for displaying signatures.

- **Append word index:** Print the Word Index at the end of the transcript.
- **Advanced transcript spacing:** Define the vertical space to add (in 1/2 points) below the header and above the footer and/or define the horizontal space to add (in characters) between the line numbers and the transcript text.

- **Unique transcript identifier:** Print a unique identifier at the bottom of each page. Signed transcripts always print the unique identifier. The unique identifier will also print if the **Print signature details at bottom of every page** option is enabled.
- **Signed transcripts:** Select signature printing options for signed transcripts (see "Viewing Property and Signature Information" on page 2 for more information). The optional signature seal is provided by E-Transcript Manager and is displayed here:



## Word Index Print Options

To format the printed layout of a word index, select the transcript you want to format from the transcript list, click the **File** menu, select **Page Setup**, select **Transcript**, then select **Word Index**. For more information, see "Working with a Word Index" on page 4.

### PAGE

Set margins, customize headers and footers, and enable cover page printing options.

- **Margin Settings:** Designate margin type. Select an automatic setting from the drop-down list or select **Custom** to designate your own margins in the Left, Right, Top, or Bottom fields (note that 0.5 =  $\frac{1}{2}$  inch).
- **Header and footer:** Customize the header and footer. Select a font type and size from the drop-down lists. Enable the **Bold** option to print the headers and footers in bold text.
- **Print cover page if available:** Enable this option to print the cover page. Enable the **Print blank page after cover if printing duplex** if you want the back of the cover page to be blank when you duplex print (page 1 of the transcript prints on the front of the next page rather than on the back of the cover page).

### BORDER

Enable external and/or internal borders. External borders are page borders, they print around the edges of transcript pages. Internal borders are borders between condensed pages and between word index columns.

- **Style:** Select the style for the borders. Enable external borders on the left, right, top, and/or bottom of the page. Enable the **Shadow** option to print a shadow on the right and bottom of the page. For the internal border, select a style (none, thin, single, or thick) to display a border between word index columns.

### WORD INDEX

- **General:** Set the number of columns, the font, and the font size for the word index.
- **Word display:** Display the number of times the word is mentioned in the transcript next to the indexed word and/or display indexed words on separate lines.
- **Page numbering:** Automatically assign page numbers to the word index or start the page numbering for the word index on a specific page number you designate.

### NUMBERING

Define font characteristics and display of page numbers.

- **Page numbers:** Select a font type and size for the page numbers from the drop-down lists. Enable the **Bold** option to print the numbers in bold text.
- **Align (page numbers):** Designate where to print the page number. Click **<None>** for no page numbers. Select **In Text** to print the page numbers within the borders of the page. Click **In Margin** to print the page numbers within the margins but outside of the borders of the page.
- **Numbering options:** Select options to **Print the page number in brackets** (e.g. [1]), **Print 'Page' with Page number** (e.g. Page 1), **Swap sides on even-numbered duplex pages** (i.e. print the page numbers on the outside edge of each page when duplex printing), and/or **Inside header/footer** to print the page number in the header/footer.

## Cover Page Print Options

To format the printed layout of a cover page, select the transcript you want to format from the transcript list, click the **File** menu, select **Page Setup**, select **Transcript**, then select **Cover Page**. Keep these things in mind about cover pages:

- Cover pages are defined and attached to transcripts in E-Transcript Manager.

- In E-Transcript Bundle Viewer, you can only see cover pages when you view a transcript with Print Preview or when you print a transcript.
- If you do not see a cover page, click the **Tools** menu, select **Options**, and enable the **Use court reporter setting if present** option. If the option is enabled and you do not see a cover page in Print Preview, it means the court reporter did not attach a cover page.

## PAGE

Set margins for the cover page.

- **Margin Settings:** Designate margin type. Select an automatic setting from the drop-down list or select **Custom** to designate your own margins in the Left, Right, Top, or Bottom fields (note that  $0.5 = \frac{1}{2}$  inch).

## BORDER

Enable external borders. External borders are page borders, they print around the edges of transcript pages.

- **Style:** Select the style for the border. Enable borders on the left, right, top, and/or bottom of the page. Enable the **Shadow** option to print a shadow on the right and bottom of the page.

## Errata Sheet Print Options

To format the printed layout of an errata sheet, select the transcript you want to format from the transcript list, click the **File** menu, select **Page Setup**, select **Transcript** then select **Errata Sheet**.

## PAGE

Set margins for the cover page.

- **Margin Settings:** Designate margin type. Select an automatic setting from the drop-down list or select **Custom** to designate your own margins in the Left, Right, Top, or Bottom fields (note that  $0.5 = \frac{1}{2}$  inch).

## BORDER

Enable external borders. External borders are page borders, they print around the edges of transcript pages.

- **Style:** Select the style for the border. Enable borders on the left, right, top, and/or bottom of the page. Enable the **Shadow** option to print a shadow on the right and bottom of the page.

## Witness Certificate Print Options

To format the printed layout of a witness certificate, select the transcript you want to format from the transcript list, click the **File** menu, select **Page Setup**, select **Transcript** then select **Witness Certificate**.

## PAGE

Set margins for the cover page.

- **Margin Settings:** Designate margin type. Select an automatic setting from the drop-down list or select **Custom** to designate your own margins in the Left, Right, Top, or Bottom fields (note that  $0.5 = \frac{1}{2}$  inch).

## BORDER

Enable external borders. External borders are page borders, they print around the edges of transcript pages.

- **Style:** Select the style for the border. Enable borders on the left, right, top, and/or bottom of the page. Enable the **Shadow** option to print a shadow on the right and bottom of the page.

## Full-sized Document Print Options

To format the printed layout of a full-sized document, select the document you want to format from the Navigation pane, click the **File** menu, select **Page Setup**, select **Document**, then select **Full-sized**. This option is only available in .ptz files with documents.

## PAGE

Set margins, customize headers and footers, and enable cover page printing options.

- **Margin Settings:** Designate margin type. Select an automatic setting from the drop-down list or select **Custom** to designate your own margins in the Left, Right, Top, or Bottom fields (note that  $0.5 = \frac{1}{2}$  inch).

## BORDER

Enable external borders. External borders are page borders, they print around the edges of document pages.

- **Style:** Select the style for the border. Enable borders on the left, right, top, and/or bottom of the page. Enable the **Shadow** option to print a shadow on the right and bottom of the page.

## NUMBERING

Define font characteristics and display of page numbers.

- **Page numbers:** Select a font type and size for the page numbers from the drop-down lists. Enable the **Bold** option to print the numbers in bold text.
- **Align (page numbers):** Designate where to print the page number. Click **<None>** for no page numbers. Select **In Text** to print the page numbers within the borders of the page. Click **In Margin** to print the page numbers within the margins but outside of the borders of the page.
- **Numbering options:** Select options to **Print the page number in brackets** (e.g. [1]), **Print 'Page' with Page number** (e.g. Page 1), and/or **Swap sides on even-numbered duplex pages** (i.e. print the page numbers on the outside edge of each page when duplex printing).

## Condensed Document Print Options

To format the printed layout of a condensed document, select the document you want to format from the Navigation pane, click the **File** menu, select **Page Setup**, select **Document**, then select **Condensed**.

## PAGE

Set margins, customize headers and footers, and enable cover page printing options.

- **Margin Settings:** Designate margin type. Select an automatic setting from the drop-down list or select **Custom** to designate your own margins in the Left, Right, Top, or Bottom fields (note that 0.5 = ½ inch).

## BORDER

Enable external and/or internal borders. External borders are page borders, they print around the edges of document pages. Internal borders are borders between condensed pages and between word index columns.

- **Style:** Select the style for the borders. Enable external borders on the left, right, top, and/or bottom of the page. Enable the **Shadow** option to print a shadow on the right and bottom of the page. For the internal border, select a style (none, thin, single, or thick) to display a border between condensed pages.

## NUMBERING

Define font characteristics and display of page numbers.

- **Page numbers:** Select a font type and size for the page numbers from the drop-down lists. Enable the **Bold** option to print the numbers in bold text.
- **Align (page numbers):** Designate where to print the page number. Click **<None>** for no page numbers. Select **In Text** to print the page numbers within the borders of the page. Click **In Margin** to print the page numbers within the margins but outside of the borders of the page.
- **Numbering options:** Select options to **Print the page number in brackets** (e.g. [1]), **Print 'Page' with Page number** (e.g. Page 1), and/or **Swap sides on even-numbered duplex pages** (i.e. print the page numbers on the outside edge of each page when duplex printing).

## CONDENSED

- **Layout:** Set the number of condensed pages to print on each sheet of paper and the layout order (vertical or horizontal) for condensed pages.
- **Numbers:** Indicate the location to print page numbers. You can indicate the location to print: numbers on each page, numbers on each sheet (the **order** of the page numbers - this is in addition to the page numbers on each condensed page), and/or the **range** (e.g. 2-5) on each full sized page of condensed pages. Select **<None>** to disable any or all options.
- **Print these pages full sized:** Print designated pages in full-sized. For example, to print the first 2 pages (perhaps a cover page and a blank page) and the last 3 pages full-sized instead of condensed, type **2** and **3** in the fields provided. You can also select to print all unnumbered pages in full size or prevent any pages from printing full sized (select **None**).
- **Space for handwritten notes:** Select a location for handwritten notes (**No Notes Space**, **Interleaved Notes**, **Right Column**, **Notes Across Bottom**, **Bottom Right**). If you do not want a designated space for handwritten notes, select the **No Notes Space** option. Enable the **Add center column note space** option to create a center column space for handwritten notes.

## Previewing a Transcript or Document and Modifying Print Settings Before Printing

Preview how a full-sized or condensed transcript, word index, cover page, errata sheet, witness certificate, or document will look before printing it. Adjust print settings to meet your needs to ensure your document prints to your specifications.

1. Select a transcript or document to print, click the **File** menu, select **Print Preview**, and select the document or transcript print type you want to preview. If an option is gray, it means there is no document of that type attached to the selected transcript or document.
2. The document will open in print preview.
  - Click the **Page Setup** toolbar button (  ) to format the printed layout of the document (page, border, text, numbering, advanced transcript spacing, and signatures).
  - Zoom in or out by choosing a percentage from the **Zoom** drop-down list.
  - Move forward, back, to the end, or to the front of the document using the arrow toolbar buttons.
3. When the document meets your print specifications, click the **Print** toolbar button.

**Note:** If a dialog displays prompting you to enter a password or obtain an unlock code, contact the reporter who sent you the transcript.

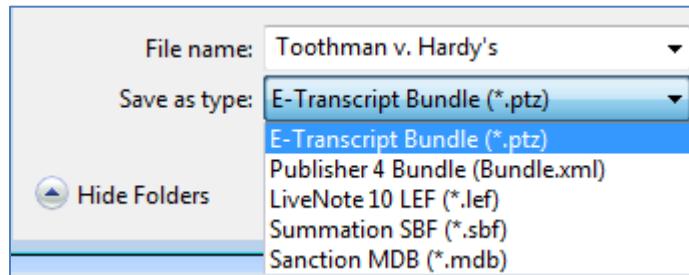
# 4 About Saving

E-Transcript Bundle Viewer allows you to save bundles, transcripts, and documents. Click the **File** menu and select **Save As** to select a format. The options available in the **Save As** menu will depend on the file format of the original file.

**Note:** If a dialog displays prompting you to enter a password or obtain an unlock code, contact the reporter who sent you the transcript.

## Saving Bundles

Saved bundles include all transcripts in the bundle, exhibits, exhibit links, and video information. Save bundles as: E-Transcript Bundles, Publisher 4 Bundles, LiveNote 10 LEF, Summation SBF, or Sanction MDB files. Click the **File** menu, select **Save As**, select **Bundle** and select an option. Alternatively, click the **Save As** toolbar button and select a file type from the Save as type drop-down field:



**Note:** If a dialog displays prompting you to enter a password or obtain an unlock code, contact the reporter who sent you the transcript.

Saved bundles include all transcripts in the bundle, exhibits, exhibit links, and video information. You can save bundles as:

- **E-Transcript Bundle (.ptz):** Save bundles as an E-Transcript Manager bundle. All transcript, exhibit, link, synchronized video information, as well as OCR information is retained and is searchable in Case Notebook. Use the PTZ format when delivering a transcript and associated video to Westlaw Case Notebook customers.
- **Publisher 4 Bundle (Bundle.xml):** Save bundles as a Publisher 4 bundle to be uploaded to iBinder. All transcript, exhibit, link, as well as OCR information is retained.
- **LiveNote 10 LEF (.lef):** Export bundles to Case Notebook and LiveNote version 8.2 and higher. Only one transcript and its exhibits, links, and synchronized video information can be saved. OCR information is not imported.
- **Summation SBF (.sbf):** Save bundles to a format that Summation software can import. Files for transcripts, linked exhibits, and any synchronized video information are created. Open the files in Summation to import them. OCR information is not imported.
- **Sanction MDB (.mdb):** Save bundles to a format that Sanction software can open. Files for transcripts, linked exhibits, and any synchronized video information are created. Open the files in Sanction to import them. OCR information is not imported.

When saving bundles as particular types, the following chart shows what information is retained:

Save as Bundle Type	All Transcripts Retained?	Exhibits Retained?	Links to Exhibits Retained?	Video Sync Info Retained?	OCR Info Retained?
E-Transcript bundle (.PTZ)	Yes	Yes	Yes	Yes	Yes
Publisher 4 bundle (Bundle.XML)	Yes	Yes	Yes	Yes	Yes
LiveNote 10 .LEF	Yes	Yes	Yes	Yes	No
Summation .SBF	Yes	Only if linked to the transcript	Yes	Yes	No
Sanction .MDB	Yes	Yes	No	Yes	No

Court reporters using E-Transcript Manager can protect a transcript with a password or lockout certain features using lockout codes. If a dialog displays prompting you to enter a password or obtain an unlock code, contact the reporter who sent you the transcript.

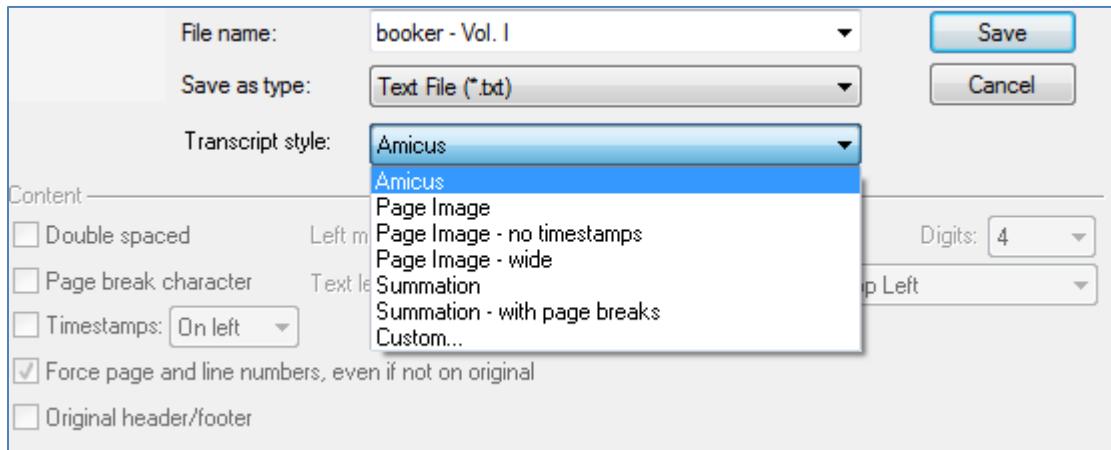
## Saving Transcripts

Save transcripts as E-Transcript files with e-signature details, ASCII files (Amicus, Page Image, Summation, or Custom), RTF files, XML files plus video, PTF files plus video, Summation files, and Sanction files. Click the **File** menu, select **Save As**, select **Transcript** and select an option. Alternatively, click the Save As toolbar button in the transcript pane.

**Note:** If a dialog displays prompting you to enter a password or obtain an unlock code, contact the reporter who sent you the transcript.

You can save transcripts in the following file types:

- **E-Transcript (.ptx):** Save transcripts to the E-Transcript Manager file format. The file contains the text, and if the transcript is signed, signature details are included. All other information is not imported.
- **ASCII (.txt):** Save transcripts as an ASCII a text file (Amicus, Page Image, Summation, or Custom). Saving as ASCII only retains the transcript. All other information is not imported. When saving an ASCII file, use the **Save as type** drop-down field to select a file type:



When saving a custom transcript, use the fields provided to:

- **Double spaced:** Print double-spaced.
- **Page break character:** Display a page break character at each page break.
- **Timestamps:** Display timestamps on the transcript on the left or right.
- **Force page and line numbers, even if not on the original:** Display page and line numbers on the transcript, even if they were not present on the original transcript.
- **Original header/footer:** Display the original transcript headers and footers on each page.
- **Left margin:** Create spaces (the number of which you specify) between the left margin and the line numbers.
- **Text leader:** Create spaces (the number of which you specify) between the line number and the text.
- **Zero padded:** Place zeroes in front of each page number.
- **Digits:** Specify the number of digits in a page number (e.g. selecting 4 will display page numbers with 4 digits like 0001).
- **Placement:** Determine where page numbers are displayed (top left, top right, bottom left, bottom right).
- **RTF (.rtf):** Save transcripts as rich text format, a generic word processing file format that can contain advanced formatting options. Saving as RTF only retains the transcript. All other information is not imported.
- **XML (.xml):** Save transcripts to xml format. XML files contain the transcript and additional data about synchronized video, if it is available. Saving as XML retains the transcript and synchronized video information.
- **PTF (.ptf):** Save transcripts to a portable transcript format. Use this format when you need to deliver a transcript and annotations to someone who uses LiveNote 10. Saving as PTF retains the transcript and synchronized video information. All other information is not imported.
- **Summation SBF (.sbf):** Save the transcript in a format that Summation software can open. Files for transcripts, linked exhibits, and any synchronized video information are created. Open the files in Summation to import them. OCR information is not imported.

- **Sanction MDB (.mdb):** Save the transcript in a format that Sanction software can open. Files for transcripts, linked exhibits, and any synchronized video information are created. Open the files in Sanction to import them. OCR information is not imported.

When saving bundles as particular types, the following chart shows what information is retained:

Save as Transcript Type	Exhibits Retained?	Links to Exhibits Retained?	Video Sync Info Retained?	OCR Info Retained?
E-Transcript (.PTX)	No	No	No	No
ASCII	No	No	No	No
RTF	No	No	No	No
XML	No	No	Yes	No
PTF	No	No	Yes	No
Summation .SBF	Only if linked to the transcript	Yes	Yes	No
Sanction .MDB	Yes	No	Yes	No

**Note:** If a dialog displays prompting you to enter a password or obtain an unlock code, contact the reporter who sent you the transcript.

## Saving Documents

Save transcripts as PEX documents (for Case Notebook or other Thomson Reuters products), in their native format (e.g. Excel), and image files. Click the **File** menu, select **Save As**, select **Document**, and select an option.

**Note:** If a dialog displays prompting you to enter a password or obtain an unlock code, contact the reporter who sent you the transcript.

Your options for saving a document depend on the file format of the original file. You may want to save a document out of a bundle for the following reasons:

- Share an E-Transcript file with a co-worker.
- Save a transcript as a custom text file.
- Share a transcript synchronized with video.
- Save a document in its original format, for example, as a PDF or spreadsheet.
- Save a document as PEX compatible with Westlaw Case Notebook and other Thomson Reuters applications.
- Save a document as an image, for example, as a JPG file.
- You want to save in its original format, for example, as a PDF or spreadsheet.
- You want to save it as PEX compatible with Westlaw Case Notebook and other Thomson Reuters applications.
- You want to save it as an image, for example, as a JPG file.

You can save documents in the following file types:

- **PEX Document:** Save the document to Thomson Reuters' .pex file format. Select this option if you plan to share the file with someone using Westlaw Case Notebook or some other Thomson Reuters product. Saving as a PEX document only retains the document and OCR information.
- **Native File:** Save the file in its original format. For example, if the original file is a spreadsheet, use this option to save it as a spreadsheet. Saving a document in its native format will not retain any exhibits, links to exhibits, synchronized video information, or OCR information. This format allows you to save to numerous file and exchange formats.
- **Image File:** Select this option to save the file as an image. Saving a document as an image file does not retain any exhibits, links to exhibits, synchronized video information, or OCR information.

When saving documents as particular types, the following chart shows what information is retained:

Save as Document Type	Exhibits Retained?	Links to Exhibits Retained?	Video Sync Info Retained?	OCR Info Retained?
PEX Document	No	No	No	Yes
Native File	No	No	No	No
Image File	No	No	No	No

Published 5/2024. L-391326  
 © 2024 Thomson Reuters. All rights reserved.  
 The trademarks used herein are the trademarks of their  
 respective owners.

