

# WEST PUBLISHER LAW FIRMS

## USER GUIDE

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# 1 About Publisher

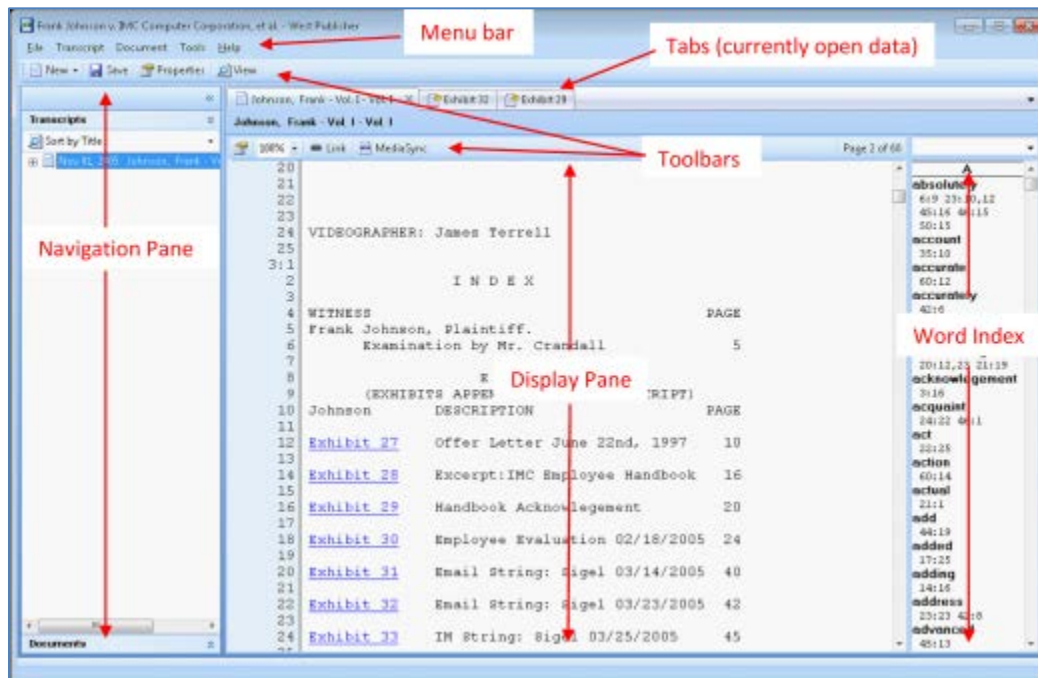
Publisher allows law firms and court reporters to create case bundles that contain transcripts, documents, and synchronized video footage.

With Publisher, you can:

- Link case documents and transcripts
- Create a text-searchable word index using optical character recognition (OCR)
- Import bundles into Case Notebook and Live Note
- View bundles in E-Transcript Bundle Viewer
- Save bundles on a CD

## The Publisher Interface

The Publisher interface allows you to open and work with case data. Categories of data display on the left and tabs displaying open data types display on the right. A small arrow on the far right allows you to switch between open tabs in the Display pane.



## Navigation Pane

The Navigation pane displays a list of transcripts and documents related to the case. Click the category name to open the category, and double-click any item in a category to open the file in the Display pane. Click the expand/collapse arrows (⏏) to expand or collapse the pane. Each category can be sorted using the **Sort By** list at the top of the category.

## Display Pane

Double-clicking on a transcript or document opens that file in the Display pane. To open an exhibit from the transcript category, right-click on the exhibit under the transcript and click **Open**. At the top of the Display pane, a toolbar provides options for working with that data type. Close an open transcript by clicking the close button on the transcript's tab. Close multiple displays by right-clicking on a tab in the Display pane and selecting **Close All But This**.

## Word Index

The Word Index lists every word and number in a document or 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 a document. See "Using the Word Index" on page 2 for more information.

## Toolbars

The Publisher toolbar has the following tools:

- **New:** Import new transcripts, documents, and bundles.
- **Save:** Save the bundle.
- **Properties:** View, edit, and save any changes to the properties of the bundle.
- **View:** View the bundle in E-Transcript Bundle Viewer.

The transcript toolbar at the top of the Display pane for an open transcript has the following tools:

- **Properties:** View, edit, and save any changes to the properties of the transcript.
- **Magnification:** Zoom in/out according to a percentage.
- **Link:** Link exhibits to the transcript.

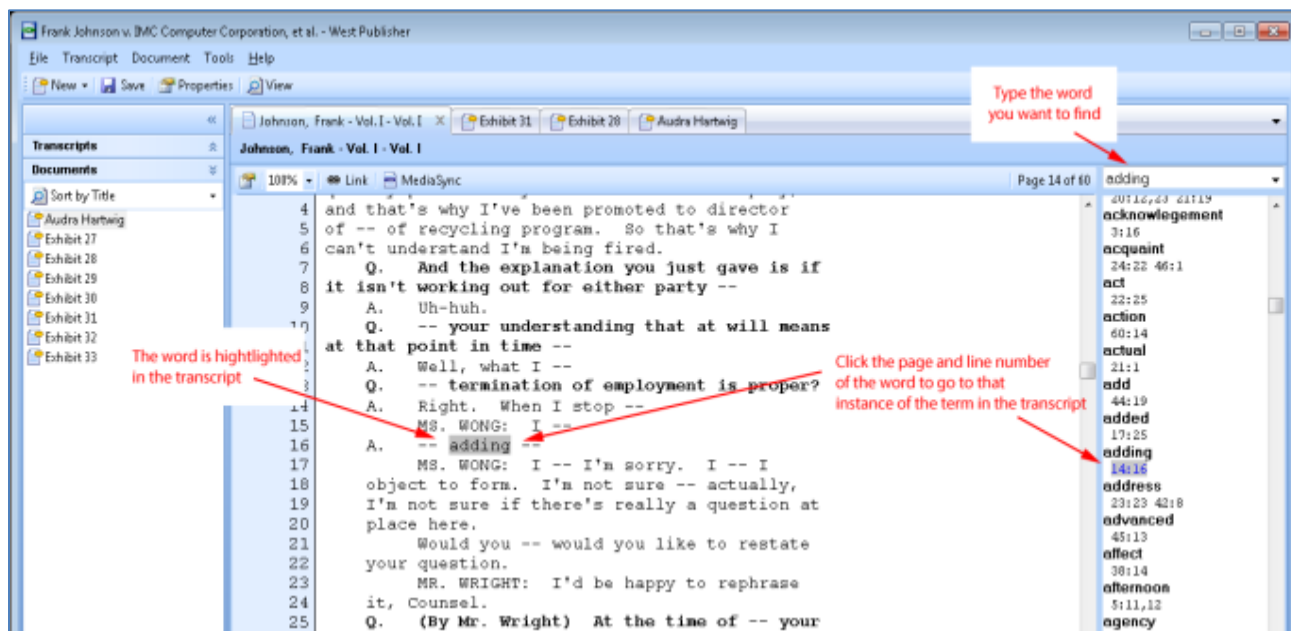
The document toolbar at the top of the Display pane for an open document has the following tools:

- **Properties:** View, edit, and save any changes to the properties of the document.
- **Zoom:** Zoom in/out or type a percentage to zoom document.
- **Fit Height/Width:** Fit document to height/width.
- **Rotate:** Rotate document to right/left.
- **Pagination:** Move to the next or previous page of the data type. You can also type a specific page in the box.

Some tools may be disabled for specific document types.

## Using the Word Index

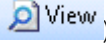
The Word Index lists every word and number in a transcript or document alphabetically with the page, and if applicable, line number on which that word occurs. The Word Index provides the ability to quickly locate key words and cross-reference them to other occurrences of that word in a transcript or document.



- Click a page or line number for a word in the Word Index to go to a highlighted instance of the word in the document text.
- Type a term in the search box at the top of the Word Index to scroll to that word in the list.

Publisher does not include noise words like "a", "the", and "that" in the Word Index.

### Selecting Word Index Display Options

You can configure the Word Index display settings when viewing a bundle in E-Transcript Bundle Viewer. Access Bundle Viewer by clicking **View** () on the Publisher toolbar. Set defaults to show or hide the word index and set preferences for the display using the **Tools** menu, **Options**, **Word Index** tab in Bundle Viewer.

Show or hide the word index by clicking the **View** menu and selecting **Word Index**.

Depending on your display settings (**Tools** menu, **Options**, **Word Index** tab), you can hover over a page or line number for a word to display a preview of the word in context.

## 2 Working with Bundles

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Bundles allow you to view and distribute transcripts, associated exhibits, and any video synchronization information in a single file format. To create a new bundle, click the **New** list on the Publisher toolbar and select **Bundle** or **Bundle from Westlaw Case Notebook**. An empty bundle opens in Publisher for you to import transcripts, documents, and video.

### Opening Bundles

1. Click the **File** menu, and select **Open Bundle**. To locate a bundle in a different location, such as on a network computer, click the **Browse** button and browse to the location of the file.
2. Search for bundles using the **Find** box and **In** list. Then click **Find Now**. Right-click the column headings to select the columns you want to display. By default, the Matter Number and Reference column headings do not display.
3. Click **OK**.

To delete a bundle, select the bundle you want to delete from the box and click **Delete**. Click **Yes** to confirm.


### Creating Bundles

To create a new bundle with no data imported, click the **File** menu, point to **New**, and click **Bundle**. You can also create Publisher bundles from Case Notebook case files. See "Working with Case Notebook Cases" on page 5 for more information.

### Setting Bundle Properties

You can change the properties of a bundle. If you set the option to display an E-Transcript Bundle cover page, the Plaintiff, Defendant, Case Title, and Matter # options display on the cover page.

To view or modify bundle properties:

1. Select the bundle you want to edit.
2. Click the **Properties** button ( **Properties**) on the Publisher toolbar.
3. Edit the appropriate options.
4. To display your contact information when the bundle is opened, select the **Display E-Transcript Bundle cover page** check box. See "Managing Cover Page Information" on page 6 for more information.
5. Click **OK** to save.

### Saving Bundles

1. Click the **File** menu, point to **Save As**, point to **Bundle**, and select from the following formats:
  - **E-Transcript Bundle (.ptz)**: For saving bundles as an E-Transcript bundle. All transcript, exhibit, link, synchronized video information, as well as OCR information is contained (if available).
  - **E-Transcript Bundle Disk (.ptz, viewer.exe)**: For saving bundles as an E-Transcript bundle to a disk. Creates a sub-directory containing the .ptz file, an autorun.inf file, and the E-Transcript Bundle Viewer. This option opens E-Transcript Bundle Viewer automatically when you insert the bundle disk.
  - **Publisher 4 Bundle (.xml)**: For saving bundles as a Publisher 4 bundle. Other options exist when saving bundles as Publisher 4.0 bundles. For other options, click the **Tools** menu, select **Options**.
  - **LiveNote 10 (.lef)**: For exporting bundles to LiveNote 10.
  - **Summation (.sbf)**: For saving bundles to a format that Summation can open.
  - **Sanction Case (.mdb)**: For saving bundles to a format that Sanction can open.
2. Browse to a location to save the file.
3. Type a name for the file in the **File name** box.
4. Select a file type from the **Save as type** list.
5. Click **Save**.

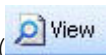


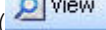
## SAVE AS OPTIONS FOR PUBLISHER 4.0 BUNDLE PDF FILES

If you often export PDFs created from scanned documents or images, you may retain the default of **Convert scanned PDFs using raw image extraction**. The first image from each page is saved to its original format, for example, as a .jpeg or .tiff. If you are importing a PDF that has more than one image per page, Publisher exports the document using the optimal text-generated PDF settings.

If you most often export PDFs created from a word processor or other non-scanned source, select **Convert text-generated PDFs by printing to file**. Each page is saved as a separate .jpeg or .tiff image. Complete the **Image Type**, **Color Format**, **Image resolution**, and **Image quality/Image format** boxes, where necessary.


## Viewing Bundles



Click the view button (  ) on the toolbar to view the bundle in E-Transcript Bundle Viewer. Bundles must be saved before they can be viewed. To view the cover page for the bundle click the **View** menu, and select **Bundle Cover Page**. To enable the option to view the cover page, select the **Display E-Transcript Bundle cover page** option in the bundle properties.

## Working with Case Notebook Cases

Publisher allows you to import both secure and local cases from Case Notebook. A repository refers to a server storage location for case files where cases can be accessed by more than one person at one time. Cases in repositories are referred to as secure cases. The case file contains information about the case, such as the name of the case and the date it was created. The case folder contains all of the content, annotations, and issues for a case. You can only open one case at a time in Publisher. Publisher contains the following case types:

- **Secure cases:** Only users authorized by administrators have access to these cases. Secure cases are stored in a secure repository on a server and can be accessed by more than one person at a time.
- **Local cases:** Local cases are Publisher's standard case type and can be created by any Publisher user. Cases that have been replicated offline and are currently being accessed locally, display with a (  ) icon. Local cases cannot reside on a network or be accessed by more than one person at a time.

## Working with the Case List (Creating and Opening Cases)

To access a list of local and network cases, click the **File** menu, point to **New**, and select **Bundle from Westlaw Case Notebook**. Network cases are only visible when you are connected to the network.

Click the list at the top to sort the list of cases. Sort cases alphabetically, by repository, by client-matter, or by favorites.

To select cases to import to Publisher:

1. Click the **File** menu, point to **New** and select **Bundle from Westlaw Case Notebook**.
2. Select the case you want to import and click **Next**.
3. If you cannot see your secure cases, click the **Repositories** button and log on to the appropriate repository. See "Locating Repositories" on page 6 for more information.
4. In the **Type** box, select the data types you want to import.
5. Optionally, click the **Groups** button to view the data groups associated with the bundle, and select a data group to use during import. You cannot create, rename, or delete data groups here.
6. Complete the appropriate options and click **Finish**.

## Showing Secure Cases on the Case List

The first time you work with secure cases, you must log on to see the secure cases assigned to you. If you are the only person who uses your computer, and you are satisfied that your Windows operating system logon offers an acceptable level of security, you can have Publisher remember your settings for secure cases. You will not have to log in the next time you want to work with secure cases.

If the secure cases logon option is set to require logon for secure cases, you must supply your user name and password each time you open Publisher and work with secure cases.

## Working with Favorites

Create a list of favorite or frequently used cases. Right-click a case in the Open Case list and click **Add to My Favorite Cases** to add the case to your list of favorite cases. Click the list at the top and select **List My Favorite Cases** to view only your favorite cases. Once in this view, remove cases from the My Favorite Cases list by right-clicking on them and selecting **Remove**.

## Locating Repositories

The first time you try to access secure cases, Publisher automatically attempts to locate the secure cases repository in which your secure cases are located. Later you can locate additional repositories.


To locate repositories:

1. Click the **File** menu, point to **New** and select **Bundle from Westlaw Case Notebook**.
2. Click **Repositories**.
3. Click **Add**.
4. Click **Locate**. Publisher searches for additional repositories.

If Publisher:

- Finds additional repositories, they are added to the **Repositories** list. To log on to the repository, see "Showing Secure Cases on the Case List" on page 5. Click **Close**.
- Cannot find any additional repositories, a message prompts whether you would like to add one manually. Click **Yes**.

To add a repository manually:

1. In the **Server** box, type the server name or IP address for the server where the repository is located or click **Browse** ().
2. Select the server where the repository is located and click **OK**.
3. Click **OK** to add the repository.
4. Upon access to a repository, enter a user name and password, if prompted. You can also select to save or change the password.

After locating the necessary repositories, add cases to the cases list. You have the following options:

- **New**: Create a new case. Browse to a location to save the new case, provide the case with a name, and click **Save**. Fill in the case properties and click **OK**.
- **Add**: Add a new case to the list of the cases. Browse to the case you want to open, then click **Open**. Ensure the list at the bottom is set to display the desired file type.
- **Remove**: Remove a case from the list of cases. Selecting **Remove** does not delete the case, it only removes it from the Open Case list of cases. You cannot remove a currently open case.

## Managing Cover Page Information

You can add your reporting agency's contact information, logo, and online scheduling page to the cover page viewed by the recipient.

If you entered cover page information in E-Transcript Manager and E-Transcript Manager resides on the same machine as Publisher, Publisher automatically copies the information from E-Transcript Manager.

If you set the option on the Bundle Properties box to display an E-Transcript Bundle cover page, some of this information displays on the printed cover page each time you open a Publisher bundle.

To add company information:

1. Click the **Tools** menu, and select **Cover Page Information**.
2. Complete the required options on the form.
3. If you want to use a Web application to schedule depositions, type the URL in the **Scheduling page** box.
4. If you want an email link to display on the cover page, type the address in the **Email address** box.

Optionally, you can add a logo to the cover page. The logo, any company information you enter, as well as some information from the Bundle Properties, displays on the printed cover page each time you open a Publisher bundle. To add a logo to the cover page, click the **Browse** button, navigate to the location of the logo, select the file, and click **Open**.

5. Click **OK**.




#### PRINTING THE COVER PAGE

1. Click the **File** menu, point to **Page Setup**, point to **Transcript**, and select **Full-sized, Condensed**, or **Word Index**.
2. Click the **Page** tab.
3. In **Cover Page**, choose whether to print a cover page and, if you are printing duplex, whether to print a blank page after the cover page.
4. Click **OK**.

See "Printing" on page 18 for more information.

## 3 Working with Transcripts

The **Transcripts** category in the Navigation pane displays a list of transcripts included in the bundle. Using the **Sort By** options at the top of the category; sort by title, date, or reverse date. To delete a transcript, right-click the transcript in the **Transcripts** category in the Navigation pane and select **Delete**.

Double-click a transcript in the **Transcripts** category to open the transcript in the Display pane. Alternately, right-click the transcript icon (  ) and select **Open**. Close an open transcript by clicking the close button on the transcript's tab. Signed transcripts display with the (  ) icon next to them. Transcripts with video footage display with the video icon (  ) next to them.

A toolbar at the top of the transcript provides shortcuts to common tasks such as linking documents to a transcript (see "Linking Documents to Transcripts" on page 14 for more information), and magnifying the transcript using the percentage list. Further, you can specify a page in the transcript to navigate to by clicking the page numbers in the top right corner of the transcript, entering a page number, and clicking OK.

### Navigating within Transcripts

There are several ways in Publisher to navigate within the pages of a transcript. The following table details the methods of navigating transcripts using the keyboard. You can also use the scroll bar to the right of the transcript.

Navigation	Keyboard Command
Go to the last page	Ctrl + End
Go to the first page	Ctrl + Home
Move to the next line	Down arrow
Move to the previous line	Up arrow
Move to next page	Page down
Move to previous page	Page up
Go to specific page	1. Ctrl + G 2. Type page number 3. Type Enter

### Setting Transcript Properties

To view or modify the properties and/or the electronic signature for a signed transcript, open the transcript properties. See "Setting Transcript Properties" on page 11 for more information.

### Saving Transcripts

You may want to save a transcript out of the bundle to send it to a colleague or associate, without saving and sending the entire bundle. Transcripts can be saved in the following formats: E-Transcript (.ptx), ASCII (.txt), Rich Text Format (.rtf), Extensible Markup Language (.xml), Portable Transcript (.ptf), Summation (.sbx), or Sanction (.mdb). See "Saving Transcripts" on page 10 for more information.

### Printing Transcripts

Use the **Print**, **Page Setup**, and **Print Preview** options to set print layout options, preview the printed layout, print a Word Index, print to a .prn file, or batch print transcripts. See "Printing" on page 18 for more information.

## Linking Documents to Transcript Text

Documents and exhibits can be linked to references in the transcript text automatically during import or manually. See "Linking Documents to Transcripts" on page 14 for more information.

## Importing Transcripts

To import transcripts into Publisher:

1. Click the arrow next to the **New** button on the Main toolbar and select **Transcript (from File)**, or click the **File** menu, point to **New**, and select **Transcript (from File)**.
2. Click **Browse** to select your transcript for import.
3. To browse for a particular file type, click the **Files of type** list and select the import file type. Import the following types of transcript files into Publisher:
  - **LiveNote Evidence Format** (.lef): LiveNote evidence format that contains a transcript, its exhibits, links, and synchronized video information (if available).
  - **E-Transcript** (.exe,.ptx): E-Transcript Manager file format. The file contains the text, and if the transcript is signed, signature details are included.
  - **Publisher Bundle** (Bundle.xml): Publisher bundle format. All transcript, exhibit, link, synchronized video information, as well as OCR information is contained (if available).
  - **E-Transcript Bundle** (.ptz): E-Transcript bundle format. All transcript, exhibit, link, synchronized video information, as well as OCR information is contained (if available).
  - **PTF** (.ptf): Portable transcript format that contains the transcript and synchronized video information (if available).
  - **ASCII** (.txt, .asc, .pr, .v\*): An ASCII text file (could be saved from Amicus, Page Image, Summation, or Custom). ASCII files only contain the transcript.
  - **XML** (.xml): Extensible markup language format. XML files contain the transcript, linked exhibit files, and additional data about synchronized video, if it is available.
  - **CT Summation** (.trn) files.
  - **Timaro Technologies Post-Production Time-Stamp** (.pts) files.
  - **Sanction MDB** (.mdb) files.
4. Select the transcripts and click **Open**.
5. Click **Next**. Some file types (e.g. ASCII) prompt you to enter import details for the transcript. See "Setting Import Details" on page 9 for more information. Confirm any warning that appears about electronic transcript signatures.
6. Click **Next**. Select **Repaginate the transcript including New York header options**, if desired.
7. Click **Next** to enter the Transcript Properties. When importing more than one transcript, you are not prompted to enter the transcript properties. See "Setting Transcript Properties" on page 11 for more information.
8. Click **Finish** to import and view the **Import Summary**. To import another transcript, click **Again**, otherwise click **Close**.

When you import more than one transcript, only the first one listed in the Navigation pane opens.

## Setting Import Details

Some transcript file types (e.g. ASCII) prompt you to enter the following details to specify a layout for the transcript you are importing.

1. Import the transcript. See "Importing Transcripts" on page 9 for more information.
2. **Import Details** displays the starting page number and the lines per page. If available, the second page number is also entered for you. Click **View ASCII** to view the transcript, verify its format, or review it for accuracy.
3. Optionally, enable the **Advanced options** to import a transcript with unusual page numbering, such as title and appearance pages or transcripts with no line numbers, or to configure header and footer information. Click **Next**.
4. Complete the **Advanced options line details**:
  - **This file has no line numbers at all**: Select this option if the ASCII file does not have line numbers. Use this option in conjunction with **Apply line numbers to pages without them** to apply line numbers.
  - **The first \_\_ pages have no line numbers**: Select this option if the first few pages do not have line numbers (like a cover page). Type the number of pages that do not have line numbers (remember, you can view the transcript by clicking **View ASCII**). This number refers to the beginning pages only, not pages found later in the file.
  - **Exclude pages without line numbers from the page count**: Select this option to exclude unnumbered pages from the page count.

- **The last page with line numbers is:** Select this option to set the last page with a line number. This is useful when you have exhibit numbering taking place on the closing pages that is confusing the line recognition.
  - **Apply line numbers to pages without them:** Select this option if you do not want to exclude pages without line numbers, and you want to insert line numbers on those pages when importing the file.
5. Complete the **Advanced options page number and header/footer details:**
    - **Are present on most pages; use them when found:** Select this option if page numbers are on all or most pages of the transcript and are consistent. Publisher assigns the same page numbers as on the transcript.
    - **Are not present in this file (first page will be number 1):** Select this option if the transcript does not have any page numbers. Publisher assigns page numbers, starting with the number 1, while importing the file.
    - **Apply only from the first page with line numbers:** Select this option if you want to apply page numbers starting with the first page that has line numbers. For example, a transcript with a title page that does not have line numbers.
    - **Preserve original headers and footers:** Select this option to preserve the headers and footers from the transcript you are importing.
    - **Always treat the first footer line as part of the transcript text:** Select this option if you want the first footer line of the original transcript to appear as part of the text on each page. In general, this is a feature that court reporters request. In some cases, a transcript with no space between the last numbered line and the footer may result in erroneous text being included with the last line of transcript text.
  6. Click **Next** to confirm your import. Click **View ASCII** to view the transcript, verify its format, or review it for accuracy. Click the **Back** button to return and amend your settings.
  7. Optionally, enable the **Repaginate the transcript including New York header options**. This option allows you to renumber the pages of the transcript, change the lines per page, and/or make adjustments for New York style headers. Click **Next** when you have completed setting the New York header options.
  8. Complete the **Advanced repagination options**, if desired:
    - **Set the first page number to:** Select this option to renumber the first page. The subsequent pages repaginate sequentially from the number you type in the text box.
    - **Reformat to \_\_ lines per page and \_\_ characters per line:** Select this option to change the number of lines per page or the number of characters per line. Changing these numbers changes the compression view of the transcript and allows you to access the Preserve options, as described below.
    - **Insert New York style numbered header line as a blank line 1 on each page:** Select this option to insert a blank New York style numbered header line into line one of each transcript page. This option is available when you import a transcript that does not have New York Style header.
    - **Preserve:** Select this option to specify specific pages that you do not want to reformat. Set the **Preserve the first \_\_ and last \_\_ pages** option to preserve pages you do not want to reformat. Select the **all non-numbered pages** option to preserve all non-numbered pages.
  9. Confirm your import. Click **View ASCII** to view the transcript, verify its format, or review it for accuracy. Click the **Back** button to return and amend your settings. Click **Next**.

## Saving Transcripts

Publisher allows you to save transcripts in many formats without saving the entire bundle. Depending on your privileges, certain features may not be available. If you are prompted for an unlock code, contact your court reporter.

Depending on the format, you have the option to save a transcript as Amicable, Page Image (includes three options), Summation (includes options for page breaks), or Custom text file.

To save a transcript:

1. Click the **File** menu, point to **Save As**, point to **Transcript**, and select from the following formats:
  - **E-Transcript (.ptx):** Save transcripts in a format compatible with E-Transcript Manager and Bundle Viewer. The file contains the text, and if the transcript is signed, the signature details.
  - **ASCII:** Save text of the transcript only.
  - **Rich Text Format (.rtf):** Save for rich text format files.
  - **XML (.xml):** Save transcripts with synchronized video.
  - **PTF (.ptf):** Save transcripts as text with annotations, text with designations, or text with annotations and designations.
  - **Sanction (.mdb):** Save transcripts to transfer to Sanction.
  - **Summation (.sbj):** Save transcripts to transfer to Summation.

2. Browse to a location to save the file.
3. Type a name for the file in the **File name** box.
4. Select a file type from the **Save as type** list.
5. If you are saving as a **Text File (.txt)**, select an option from the **Transcript style** list: **Amicus**, **Page Image** (includes three options), **Summation** (includes options for page breaks), or **Custom**. The Custom transcript style has the following options:
  - **Double spaced**: Double-space the transcript text.
  - **Left margin**: Set the number of spaces between the left margin and the line numbers.
  - **Page break character**: Display a character at each page break.
  - **Text leader**: Set the number of spaces between the line number and the transcript text.
  - **Timestamps**: Display timestamps on the transcript in a designated location.
  - **Force page and line numbers, even if not on original**: Display page and line numbers on the transcript.
  - **Original header/footer**: Display the headers and footers from the original transcript on each page.
  - **Zero padded**: Place zeroes in front of each page number.
  - **Digits**: Set the number of digits in the page number. For example, if you select 4, page numbers display as 0001, 0002...
  - **Placement**: Set the location of the page numbers.
6. Click **Save**.



#### SAVING TRANSCRIPTS WITH VIDEO AS A PORTABLE TRANSCRIPT FORMAT (.PTF) FILE

You can export transcripts with video from Publisher bundles to LiveNote by saving the transcript as a .ptf file. This will automatically include any synchronized video as a .vid file, making it easier to import files into LiveNote.

1. Click the **File** menu, point to **Save As**, point to **Transcript**, and select **PTF**.
2. Browse to a location to save the file.
3. Type a name for the file in the **File name** box.
4. Click **Save**.

Observe that both a .ptf file and a .vid file are exported to the specified location.

#### VIEWING THE VIDEO AND SYNCHRONIZED TRANSCRIPT TEXT IN LIVENOTE

1. In LiveNote, open a transcript that has synchronized video. A transcript with synchronized video is denoted by the video icon (  ).
2. Click the video icon (  ).
  - If LiveNote locates the video, the video plays at the point in the transcript where the cursor is located.
  - If LiveNote cannot locate the video, complete the following:
    1. Browse to the folder in which the video file is stored and click **OK**.
    2. Click **Append Path** to have LiveNote look for the video in the location that you specified every time you play the video.
    3. Click **Play Video**.


#### VIEWING THE VIDEO AND SYNCHRONIZED TRANSCRIPT TEXT IN TRIAL DIRECTOR

1. Locate a transcript that has synchronized video.
2. In TimeCoder Pro, import the .ptf file.
3. Export the .ptf file as a TrialDirector Case File (.cms).
4. In TrialDirector, import the .cms file.
5. Open the .cms file and play the video.

### Setting Transcript Properties


Transcript properties consist of information about a transcript, including the name, the type, and the date it was taken.

Access and edit the transcript properties using any of the following:

- Right-click a transcript in the **Transcripts** category in the Navigation pane and select **Properties**.
- Click the **Properties** toolbar button (  ) from an open transcript in the Display pane.

- Select a transcript in the Navigation pane, click the **Transcript** menu, and select **Properties**.
1. Change the following options, if required:
    - From the **Type** list, choose **Fact Witness**, **Expert**, **Court Transcript**, or **Other**. If you select **Other** or **Court Transcript**, certain options are disabled.
    - From the **Status** list, choose whether the transcript is **Draft** or **Final**.
    - In the **Vol** box, type the transcript's volume number.
    - Click the **Date** list to display an interactive menu. Choose a date for the transcript.
    - Type a new **Title**, if applicable. The Title box defaults to the name and volume number that you entered in the **Last**, **First**, and **Vol** boxes.
    - In the **Taking attorney** box, type the name of the attorney taking the deposition.
    - In the **For** list, select whether the transcript is intended for the **Plaintiff** or **Defendant**.
    - Type a **Comment**.
  2. Click the **Signature** button.

An E-Transcript Signature verifies the authenticity of a transcript created electronically on a secure server. The signature identifies the transcript author and date of creation. Legal statutes recognize the validity of electronic signatures. Some courts accept electronically signed transcripts in lieu of hard copies.

3. If the transcript is not signed, This transcript is not electronically signed displays. Click the **Verify Signature** button. Publisher verifies the signature and displays the status of the signature.
4. Click **Certificate Page** to display any signature image.
5. Click **Close**.
6. Click **OK**. The transcript properties are updated and the signed icon (  ) displays beside the transcript in the Navigation pane.

If you change the title of the transcript or the date it was taken, the new details display in the Title bar.


Click **OK** to save any changes.



## 4 Working with Documents

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The **Documents** category in the Navigation pane displays a list of documents included in the bundle. Using the **Sort By** options at the top of the category; sort by title, date, or reverse date. To delete a document, right-click the document in the **Documents** category in the Navigation pane and select **Delete**.

Double-click a document in the **Documents** category to open the document in the Display pane. Alternately, right-click the document icon () and select **Open**. Close an open document by clicking the close button on the document's tab.

Use the toolbar above the document in the Display pane to access document properties, fit to height, fit to width, view native size, zoom, rotate, and navigate between pages of the document. Some options may be disabled depending on the document type.

### Setting Document Properties

Properties consist of information about a file, including the title, the type, author, recipient, bates range, and the date it was created. Access and edit the document properties using any of the following:

1. Right-click a file in the Navigation pane and select **Properties**.
2. Click the **Properties** toolbar button (  ) from an open document in the Display pane.
3. Select a document in the Navigation pane, click the **Document** menu, and select **Properties**.
4. Click the **Details** tab. Change the following options, if required:
  - Type a **Title** for the document. The default title is the name of the imported file.
  - From the **Type** list, choose from the following: Agreement, Article, Contract, Deed, Email, Expert - Misc, Expert Curriculum Vitae, Expert Report, Expert Resume, Fax, Letter, Memo, or Other.
  - Type an **Author** for the document.
  - Type a **Recipient** for the document.
  - Type the **Bates range** and **Through** fields.
  - Check **Document Date** to add a date, if desired.
  - Check **OCR** to process the document using OCR, if desired.
5. Click **OK** to save changes to the document.

### Saving Documents

Publisher allows you to save documents in several formats without saving the entire bundle. Your options for saving a document depend on how the document was imported into Publisher. Depending on your privileges, certain features may not be available. If you are prompted for an unlock code, contact your court reporter.

To save a document:

1. Click the **File** menu, point to **Save As**, point to **Document**, and select PEX Document, Native File, or Image File.
2. Browse to a location to save the file.
3. Type a name for the file in the **File Name** box.
4. Select a file type from the **Save as type** list. The options for file type depend on how the document was imported into Publisher.
5. Click **Save**.

### Printing Documents

Use the **File** menu **Print**, **Page Setup**, and **Print Preview** options to set print layout options, preview the printed layout, print a Word Index, print to a .prn file, or batch print documents. See "Printing" on page 18 for more information.

### Linking Documents to Transcript Text

Documents and exhibits can be linked to references in the transcript text automatically during import or manually. See "Linking Documents to Transcripts" on page 14 for more information.

## Importing Documents

Import one or more documents into Publisher.

1. Click the arrow next to the **New** button on the Main toolbar and select **Document (from File)**. Alternatively, click the **File** menu, point to **New**, and select **Document (from File)**.
2. Click **Add** to select documents for import. If you want to import a load file, see "Importing Load Files" on page 16.
3. To browse for a particular file type, click the **Files of type** list at the bottom and select the import file type. You can import the following types of files for documents and pleadings into Publisher:
  - **Images** (.tif, .tiff, .bmp, .jpe, .jpg, .jpeg, .gif, .png, .jfx).
  - **Portable Document Format** (.pdf).
  - **Microsoft Word** (.doc, .docx).
  - **Corel WordPerfect** (.wp, .wpd).
  - **Microsoft Outlook Message** (.msg).
  - **Hypertext Markup Language** (.htm, html).
  - **LiveNote Document** (.pex).
  - **Plain Text** (.txt).
  - **Rich Text Format** (.rtf).
4. Select the documents and click **Open**.
  - For most file types, each file is imported as a separate document. For image files, you have the option of importing each file as a separate document or merging multiple files into one document. To merge multiple image files, enable the **Batch Import, each file is separate document** option. This option is not available for data consisting of multiple, differing document types.
  - Select a document and click **View** to view the document.
  - Select a document and click **Remove** to remove it from the list of documents to import.
  - Select a document and click **Up** or **Down** to change the order of the documents in the list.
5. If importing a single document with properties, click **Next** to enter the document properties. Publisher recognizes documents that are image or PDF files and automatically enables the **OCR** option to process the document using optical character recognition and therefore create characters from the full text of the image document.
6. If you want to automatically link the documents to transcripts already in the bundle, click **Next**.
7. Select the transcripts you want automatically linked to the document.


To link documents to transcript text after import, see "Linking Documents to Transcripts" on page 14.
8. Click **Finish**.

## Linking Documents to Transcripts

When you import a document, Publisher automatically links the document file name to any links with that name (see "Importing Documents" on page 14 for more information). For example, if your transcript repeatedly refers to Document 21, use the **Link** option to link all mentions of Document 21 to that document. Then, when you click any Document 21 link in the transcript, the document displays. To link a document to a transcript, the document must be in the bundle that contains the transcript. If you do not want to link the document during import, you can manually link the document to a transcript.


There may be instances when a document is referred to by several different names in a transcript. For example, a document may be referred to as Exhibit 1, Exhibit No. 1, and Exhibit #1 in the same transcript. You can find all instances of the document names and link to all variations of the document name in the transcript at one time. See "Linking Multiple Terms" on page 15 for more information.

### MANUALLY LINKING DOCUMENTS

1. Open the transcript you want to link the document to.
2. Click **Link** (  **Link** ) on the Transcript toolbar.
3. In the **Find** box, type the word or words that you want to link the document to. To search and link a document to multiple terms at one time, use a semicolon (;) between the search terms (see "Linking Multiple Terms" on page 15 for more information). You can use connectors when searching within transcript text.
4. Use the **Exhibit** list to select the document you want to link.
5. Click the **Find Next** button. Publisher finds the word you specified and highlights it. You have the following options:


- Click the **Link** button to link the highlighted word to the document that you specified. Publisher links the document to the specified text and then highlights the next occurrence of the word, giving you the opportunity to link the document to that occurrence as well.
  - Click the **Link All** button to link all occurrences of the highlighted word in the transcript to the specified document. If you are saving the file in .LEF format for import into LiveNote, use the **Link All** feature. This ensures that all occurrences of a phrase are exported to LiveNote 10. The .LEF format does not support exporting individual links.
6. Click **Close**. Alternately, you can also open the transcript in the Display pane, select a region of up to ten terms, right-click and select **Link**.

#### DELETING LINKS

1. Open the transcript in the Display pane.
2. Click **Link** (  **Link** ) on the transcript toolbar.
3. Select the link you want to delete and click **Unlink All**. All links from the specified term are deleted, including those to different documents.
4. Click **OK**. A message indicates how many links are deleted.

#### LINKING MULTIPLE TERMS

If you have a document that is referred to by multiple names in a transcript, you can search for the names and create links for all the instances in the same step. To search for multiple terms at a time, complete the following:

1. Open the transcript in the Display pane.
2. Click **Link** (  **Link** ) on the transcript toolbar.
3. Type the list of terms you want to link the document to in the **Find** box separating each term with a semicolon (;). For example, type **Exhibit 1; Ex. 1; Exhibit #1**. Search connectors within a list of terms do not function as connectors, but are treated as plain text.
4. Use the **Exhibit** list to select the document you want to link.
5. Click the **Find Next** button. Publisher finds the first instance from the list of terms you specified and highlights it. You have the following options:
  - Click the **Link** button to link the highlighted word to the document that you specified. Publisher links the document to the specified text and then highlights the next occurrence from the list of terms, giving you the opportunity to link the document to that occurrence as well.
  - Click the **Link All** button to link all instances of the list of terms in the transcript to the specified document. If you are saving the file in .LEF format, use the **Link All** feature. This ensures that all occurrences of a phrase are exported. The .LEF format does not support exporting individual links.
6. Click **Close**.

#### USING CONNECTORS IN SEARCH

- **&**: Finds multiple search terms. For example, if you type **drive&driveway**, the search results include both 'drive' and 'driveway'.
- **OR**: Finds either search term or both terms. For example, if you type **drive or driveway**, the search results include 'drive' or 'driveway'.
- **! Root expander**: Finds any form of the root word. For example, if you type **drive!**, the search results include 'drive', 'driveway', 'drives', and 'driver'.
- **\* Universal character**: Represents one variable character. For example, if you type **p\*st**, the search results include 'post', and 'pest'. Note, when you place one or more universal characters at the end of a term, you specify the maximum length of that term.
- **/n Within n terms of**: Finds either term within the specified number of words from the other term. For example, if you type **drive /5driveway**, the search finds 'driveway' within 5 words, in either direction, of 'drive' and vice versa.
- **+n Preceding within n terms of**: Finds either term when the first term precedes the second term within the specified number. For example, if you type **company +5 obtain**, the search finds 'company' any time it precedes 'obtain' by 5 or less words.
- **" " Phrase**: Finds an exact phrase. For example, if you type **"mold abatement"**, the search results only display matches for that phrase in that order.

## Importing Load Files

Import load files into Publisher. Load files are used to import batches of files. Typically ASCII text files, load files contain delimited information specifying the format of documents. When importing load files, it asks you to match fields being imported with the existing fields in Publisher.

1. Click the arrow next to the **New** button on the Main toolbar and select **Document (from File)**. You can also click the **File** menu, point to **New**, and select **Document (from File)**.
2. Click **Load File** to select load files for import.
3. To browse for a particular file type, click the **Files of type** list and select the import file type. You can import the following types of document into Publisher:
  - **CaseCentral ASCII Load File (.txt)**.
  - **Concordance ASCII Load File (.dat)**.
  - **IPro ASCII Load File (.lfp)**.
  - **Lextranet ASCII Load File (.txt)**.
  - **Opticon ASCII Load File (.opt)**.
  - **Summation ASCII Load File (.txt)**.
4. Select the load files and click **Open**.
  - Select a load file and click **View** to display the load file.
  - Select a load file and click **Remove** to remove it from the list of documents to import.
  - Select a load file and click **Up** or **Down** to change the order of the documents in the list.
5. Click **Next** to enter the field delimiter information. Bad data is flagged with a red asterisk.
  - **File Type**: The supported file format file type for the load file. If your load file is not one of the types listed, you still may be able to import it using the **Custom** option.
  - **Field delimiter**: This field is automatically filled in for you. Choose from the following format options: **, ; {space} {tab} | ^**
  - **Row delimiter**: This field is automatically filled in for you. **{newline}** indicates the end of the line character. This field supports up to seven characters.
  - **Text Qualifier**: This field is automatically filled in for you. Choose from the following format options: **" ' {none}**
  - **First row contains field names**: Enable this option to exclude column headings from the import.
6. Click **Next** to enter the field mappings information. Here you assign a title to each field (or column) in the file by mapping the field. For example, to map the first field, which may contain Author information, click to select the **[none]** column. Then select **Author** from the **Mapping** drop-down. Repeat this process for each field you want to map.
  - **Field**: Select the column number for which to map information selected in the **Mapping** option. Use the **Field** and **Mapping** options to map numerous columns.
  - **Mapping**: Select the information to map to the selected column.
  - **Do not import field (skip)**: Enable this option to skip import of the selected column.
  - **Field indicates start of new document when**: Select **Not Empty** or **Value changes** to indicate the start of a new record for the selected field. For example, if you select **3** from the **Field** option, **File Path and Name** from the **Mapping** option, and **Value Changes** in this option, a new document is recognized each time a file's path and name changes.
7. Click **Finish**, then click **OK**. The document is listed in the Documents category in the Navigation pane. If any errors occur, a **Load File Errors** message displays. The import continues despite any errors.

## Using Optical Character Recognition

Optical character recognition (OCR) is the conversion of images of text into machine-encoded/computer-readable text. Essentially, OCR extracts text from images for use of that text in the Word Index. OCR options can be set via the **Tools** menu, **Options**, **OCR** tab. Set custom OCR settings for documents, pleadings, or research files via the properties (right-click the file and select **Properties**). Right-clicking content with images or OCR extracted text provides copy/paste options for images only, OCR text only, or both image and OCR text.

Recommendations for OCR:

- Documents should be scanned at 300 DPI or higher resolution for OCR.
- Use the **Image & OCR Text** option to verify the OCR text against the image, especially if the original image was of lower quality.

- Text size for scanned documents should be 10pt or larger.
- Documents should be scanned in gray scale vs. black/white.
- Documents should be scanned right-side up with lines parallel to the bottom of the page.
- Documents should be scanned on clean paper. OCR can be difficult on documents with "noise" (for example, faxes with ink blotches or lines).

A list of data that has been converted using OCR can be accessed via the **Tools** menu, **OCR Status** option. A check mark displays next to content that has been through the OCR process. Select the check box to process the content using OCR or clear the check box to remove OCR text for that content from the Word Index. Any custom settings assigned to a document remain with the document until you change them. For example, if you set the language to French for a document, that language setting is retained even if you deselect that document from the OCR status list. If you recheck that document, the document uses the French language setting.

**To view whether your document has been processed using OCR:**

On the **Tools** menu, click **OCR Status**. Documents that have a check mark in the check box beside them have been processed using OCR. Alternately, you can view the OCR check box on the Document Properties dialog box.

**To process a document using OCR:**

On the **Tools** menu, click **OCR Status**. Select the check box beside the document you want to process using OCR and click **OK**.

# 5 Printing

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There are numerous print and print preview options in Publisher. You can:

- Set print layout options for files using **Page Setup** options.
- Preview documents before printing it (see "Previewing Data Before Printing" on page 18 for more information).
- Print files in full-sized or condensed (multiple pages on one sheet) using the **File** menu, **Print** options.
- Print the Word Index for a transcript using the **File** menu, **Print, Transcript, Word Index** option.
- Print data to a .prn file using the **File** menu, **Print** options (see "Printing to a Printer File" on page 18 for more information).
- Print a cover page or errata sheet, where applicable.


## Formatting the Printed Layout

Format the printed layout of your data using the **Page Setup** options. Select the data you want to format from the Navigation Pane or Display Pane, click the **File** menu, point to **Page Setup**, point to the data type you want to print, and select the data type you want to print. Page setup options differ slightly depending on the data type you select. Publisher provides the following Page Setup options:

- Page Setup for Condensed Printing (see page 18 for more information).
- Page Setup for Printing the Word Index (see page 20 for more information).
- Page Setup for Full-sized Printing (see page 21 for more information).
- Page Setup for Cover Page and Errata Sheet Printing (see page 21 for more information).

## Previewing Data Before Printing

Preview how printed data looks before printing it. Adjust print settings to meet your needs and ensure your data prints to your specifications.

1. Select the data that you want to print from the Navigation pane or Display pane, click the **File** menu, point to **Print Preview**, point to the data type you want to print, then select a print option.
2. Preview the data by doing the following:
  - Click the **Page Setup** toolbar button () to view and modify the margins and orientation of the printed page.
  - Zoom in and out by choosing a percentage from the **Zoom** list.
  - Move forward, back, to the end, or to the beginning using the arrow toolbar buttons.
3. Click the **Print** toolbar button.


## Printing to a Printer File

Print transcripts, documents, the Word Index, cover pages, or errata sheets to a printer file.

1. Open the data you want to print or from which you want to print a Word Index.
2. Click the **File** menu, point to **Print**, point to the data type you want to print, and select the data type you want to print.
3. Select the **Print to file** check box.
4. If required, change any other printer settings and click **OK**. The printer file is created.

## Page Setup for Condensed Printing

To format condensed (multiple pages on one sheet) printed layout, select the data you want to format from the Navigation pane or Display pane, click the **File** menu, point to **Page Setup**, point to the data type you want to print, then select **Condensed Transcript**.

Open the data in print preview and click the **Page Setup** toolbar button () if you want to view changes as you modify the page setup. Page setup options differ slightly depending on the data type you select. Click **Apply** after any modification to view changes.

## PAGE

Set margins for your printed output. For transcripts you can customize headers and footers and select cover page printing options.

- **Margins:** Select an automatic setting from the list. Select **Custom** from the list to designate your own margins in the Left, Right, Top, or Bottom boxes.  
**Note:** 0.5 = ½ inch.
- **Header and Footer** (transcripts only): Customize the transcript header and footer. Select a font type and size from the lists. Select the **Bold** option to print the headers and footers in bold text. Select **Print on each condensed page** option to print the header and footer on each page.
- **Cover Page** (transcripts only): Select the **Print** option to print the transcript cover page (if one is available). Select **Blank page after, if 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

Print external and/or internal borders. External borders are page borders, they print around the edges of pages. Internal borders are borders between condensed pages and, for transcripts, between Word Index columns.

**Style:** Select the style for the borders. Select to print 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 (TRANSCRIPTS ONLY)

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

- **Font:** Define font characteristics. Select a font type and size from the lists. It is recommended that you select a fixed-width (monospace) font like Courier New for full-sized pages to avoid alignment problems. Select 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 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** fills the entire page with text.
- **Alternate font pages:** Define fonts for certain pages. Select a font type and size from the drop-down lists. Select the **Bold** option to print the alternate pages in bold text. Enter page numbers in the **First \_ and the last \_ pages** fields to designate pages to print as alternate font pages. 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 makes the letter **Q** and/or **A** bold. Selecting the **Speaker bolding** option allows you to set the speaker text as bold. For example, when attorneys are speaking with the judge.

## NUMBERING

Define font characteristics and display of page numbers. For transcripts, define the characteristics and display of line numbers and timestamps.

- **Page numbers:** Select a font type and size for the page numbers from the lists. Select 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** (transcripts only): Select a font type and size for the line numbers from the drop-down lists. Select the **Bold** option to print the numbers in bold text. Select **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** (transcripts only): Select a font type and size for the timestamp from the drop-down lists. Select the **Bold** option to print the timestamp in bold text.
- **Align** timestamps (transcripts only): Designate where to print the timestamp. Click **<None>** for no timestamp, **On left** to print timestamp on the left, or **On right** to print the timestamp on the right. Select **In Text** to print the timestamp within the borders of the page. Click **In Margin** to print the timestamp within the margins but outside of the borders of the page.

## CONDENSED

Define the font characteristics, page numbers, and display of the condensed pages on the full-sized sheets.


- **Layout:** Define font characteristics and the layout of the condensed printed pages. Select a font type from the **Font** list (transcripts only). Set the number of condensed pages to print on each sheet of paper from the **Layout** drop-down list and the layout order (vertical or horizontal) for condensed pages from the **Order** list.  
**Note:** When printing Westlaw research files in dual-column format, **Dual Column** is the only available option.
- **Page:** Select the location to print page numbers from the **Numbers** list. 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 page of condensed pages. Select **<None>** to disable any or all options.
- **Print these pages full sized:** Print designated pages 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 (transcripts only) 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 (TRANSCRIPTS ONLY)

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

- **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 also prints if the **Print signature details at bottom of every page** option is selected.
- **Signed transcripts:** Select signature printing options for signed transcripts.

## Page Setup for Printing the Word Index

To format the printed layout of a Word Index, select the transcript from the Navigation pane or Display pane, click the **File** menu, point to **Page Setup**, point to **Transcript**, then select **Word Index**. Open the Word Index in print preview and click the **Page Setup** toolbar button () if you want to view changes as you modify the page setup. Click **Apply** after any modification to view changes without closing the dialog.

## PAGE

Set margins for your printed output.

**Margins:** Select an automatic setting from the list. Select **Custom** from the list to designate your own margins in the Left, Right, Top, or Bottom fields.

**Note:** 0.5 = ½ inch.

## BORDER

Print external and/or internal borders. External borders are page borders, they print around the edges of pages. Internal borders are borders between Word Index columns.

**Style:** Select the style for the borders. Select to print 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 pages.

## WORD INDEX

- **General:** Set the number of columns, the font, and the font size for the Word Index.



- **Word display:** Enable the **Include number of hits next to words** option to include a count next to each word in the Word Index.
- **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, line numbers, and timestamps.


- **Page numbers:** Select a font type and size for the page numbers from the lists. Select 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.
- **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).

## Page Setup for Cover Page and Errata Sheet Printing

To set options for cover pages and errata sheets:

1. Click the **File** menu, point to **Page Setup**, point to **Transcript** and select **Cover Page** or **Errata Sheet**.
2. Click the **Page** tab.
3. To change preset margins, in **Margins**, from the **Settings** list, select:
  - **FAX:** Left .5, Right .5, Top .5, Bottom .5
  - **Bound on left edge:** Left 1.25, Right .75, Top .5, Bottom .5
  - **Bound on top edge:** Left 1, Right .75, Top 1, Bottom .5
  - **Stapled:** Left 1.25, Right .75, Top .75, Bottom .5
  - **Custom :**Retains current settings
4. Click the **Border** tab. In **External Border**, choose a border style for the entire page or select the check boxes for a specific side of the page.
5. Select the **Shadow** check box if you want to print a shadow along the bottom and right borders.
6. For condensed transcripts only, in **Internal Border**, choose an internal border style.
7. Click **OK**.

## Page Setup for Full-sized Printing

To format full-sized printed layout, select the data you want to format from the Navigation pane or Display pane, click the **File** menu, point to **Page Setup**, point to the data type you want to print, then select **Full-sized**. Open the data in print preview and click the **Page Setup** toolbar button () if you want to view changes as you modify the page setup. Page setup options differ slightly depending on the data type you select. Click **Apply** after any modification to view changes without closing the dialog.

## PAGE

Set margins for your printed output. For transcripts you can customize headers and footers and select cover page printing options.

- **Margins:** Select an automatic setting from the list. Select **Custom** from the list to designate your own margins in the Left, Right, Top, or Bottom fields.  
**Note:** 0.5 = ½ inch.
- **Header and Footer:** Customize the transcript header and footer. Select a font type and size from the lists. Select the **Bold** option to print the headers and footers in bold text.
- **Cover Page:** Select the **Print** option to print the transcript cover page (if one is available). Select **Blank page after, if 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

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

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

## TEXT (TRANSCRIPTS ONLY)

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

- **Font:** Define font characteristics. Select a font type and size from the lists. It is recommended that you select a fixed-width (or monospace) font like Courier New for full-sized pages to avoid alignment problems. Select 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 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** fills the entire page with text.
- **Alternate font pages:** Define fonts for certain pages. Select a font type and size from the lists. Select the **Bold** option to print the alternate pages in bold text. Enter page numbers in the **First \_ and the last \_ pages** fields to designate pages to print as alternate font pages. 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 makes the letter **Q** and/or **A** bold. Selecting the **Speaker bolding** option allows you to set the speaker text as bold. For example, when attorneys are speaking with the judge.

## NUMBERING

Define font characteristics and display of page numbers. For transcripts, define the characteristics and display of line numbers and timestamps.

- **Page numbers:** Select a font type and size for the page numbers from the lists. Select 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** (for example, [1]), **Print 'Page' with Page number** (for example, Page 1), **Swap sides on even-numbered duplex pages** (that is, 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 (transcripts only):** Select a font type and size for the line numbers from the lists. Select the **Bold** option to print the numbers in bold text. Select **Line numbers in parentheses** to print the line numbers in parentheses (for example, (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.
- **Print timestamps (transcripts only):** Select a font type and size for the timestamp from the lists. Select the **Bold** option to print the timestamp in bold text.
- **Align timestamps (transcripts only):** Designate where to print the timestamp. Click **<None>** for no timestamp, **On left** to print timestamp on the left, or **On right** to print the timestamp on the right. Select **In Text** to print the timestamp within the borders of the page. Click **In Margin** to print the timestamp within the margins but outside of the borders of the page.

## ADVANCED (TRANSCRIPTS ONLY)

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



- **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 also prints if the **Print signature details at bottom of every page** option is selected.
- **Signed transcripts:** Select signature printing options for signed transcripts.

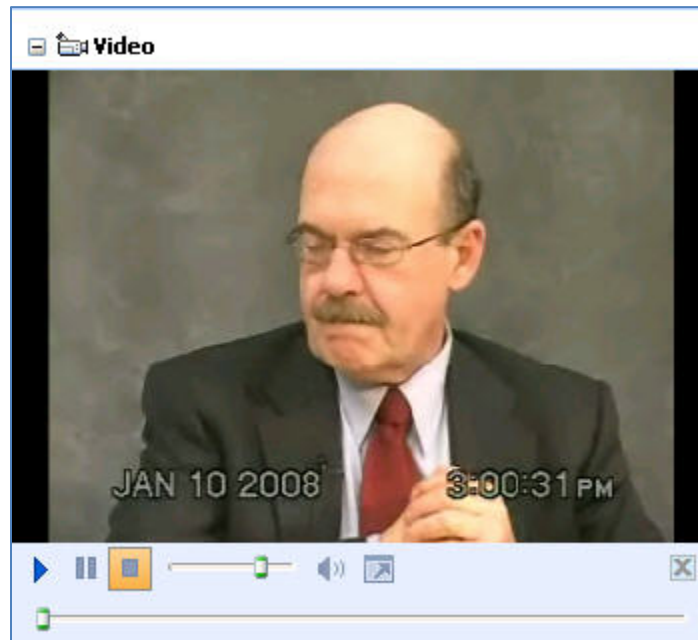
## 6 Working with Videos

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Some transcripts have an associated video that is synchronized with the transcript. You can add a video transcript to a bundle and then view the video.

To play a synchronized video:



1. Click **View** on the Publisher toolbar to open E-Transcript Bundle Viewer.
2. Open a transcript that has synchronized video. A transcript with synchronized video is denoted by the video icon (  ) on the Transcript or Document toolbar.
3. Click **Play Video** (  ). If Publisher:
  - Finds the video, the video plays at the point in the transcript where the cursor is located. The Display Pane highlights the spoken text.
  - Cannot find the video, the **Find Video File** box opens. Browse to the location of the file and click **Open** to play the video.
4. Use the control panel to stop the video or adjust the volume.




5. Use one of the following methods to quickly move to another location in the video:
  - Use the scroll bar at the bottom of the control panel to move through the video to a specific point.
  - In the Display pane, move the scroll bar to a point in the transcript and click a line in the transcript. The video moves forward to the corresponding point.

### Creating Video Clips

To create a video clip:

1. Click **View** on the Publisher toolbar to open E-Transcript Bundle Viewer.
2. Double-click the transcript in the Navigation Pane and click **Play Video** (  ).
3. Browse to the location of the file and click **Open**.
4. Scroll to the text that you want to use to create a video clip.
5. Click to the left of the starting point of the text, and drag your cursor over the text to highlight the text you want to include in the video.
6. In the Video Clips pane, click **Create Video Clip** (  ).

7. Type a description for the video and click **OK**.

9. If you want to save a video clip, select the clip in the Video Clip pane and click **Save Video Clips** (). If you want to save more than one clip, press the **Shift** key while selecting each clip.

10. Browse to the location where you want to save the files and click **Save**. You can save the video as the original video file type (for example, .mpg) or as a Microsoft PowerPoint file (.ppt).

Saving multiple files creates files with similar names appended with the corresponding transcript page and line number. For example, if you save two clips and their description is Negligence, the clip names might be negligence-5\_15 - 5\_18.mpg and negligence-38\_21 - 38\_24.mpg indicating that the clips came from page 5 lines 15 through 18 and page 38 lines 21 through 24.

11. Select the video clip and click the **Transcript Properties** button (  ) to change the name of the video clip.