Case CATalyst®

Fields
Self-Study Guide

The goal of this self-study guide is to help you learn
how to use Fields to more quickly and efficiently
fill in information for standard pages,
parentheticals, and headers/footers.

Table of Contents

Why fields can be better than other placeholders

Most standard pages, some parentheticals and some headers/footers contain information that varies from transcript to transcript: the names of the parties, their representatives, the name of a witness, interpreter, judge, locations, dates, times, etc. Reporters and scopists use a wide variety of methods to create placeholders for that text in include files and definitions. Each method has its pros and cons, however for most items, the best and most efficient placeholder is a **field**.

PLACEHOLDER TYPE	ADVANTAGES	DISADVANTAGES
Plain text: XXX or ***	1. Holds place for text. 2. Can use Search to locate. 3. Replace or delete and type text.	1. Cannot use Scan to locate. 2. Does not identify what the text placeholder represents. 3. Typically only useful for one-spot corrections. 4. Filled-in information cannot easily be stored or reused.
Caret plus one space: ^	1. Holds place for text. 2. Can use Scan to locate. 3. Replace or delete and type text.	1. Does not identify what text placeholder represents. 2. Typically only useful for one-spot corrections. 3. Filled-in information cannot easily be stored or reused. 4. Cannot be used in header/footer.
Single choice conflict: ^ WITNESS	1. Holds place for text. 2. Can use Scan to locate. 3. Can be E-defined or replaced.	1. Filled-in information cannot easily be stored or reused. 2. Cannot be used in header/footer.
Multiple choice conflict: ^ Plaintiff ^ Defendant	1. Holds place for text. 2. Can use Scan to locate. 3. Can be selected, E-defined or replaced.	1. Filled-in information cannot easily be stored or reused. 2. Cannot be used in header/footer. 3. Numerous choices in a conflict can cause formatting/display issues.
Text surrounded by scanstop: <Scanstop Begin>Notice<Scanstop End>	1. Holds place for text. 2. Can use Scan to locate. 3. Can be selected, E-defined or replaced.	1. Filled-in information cannot easily be stored or reused. 2. Cannot be used in header/footer.
Field: [!SEAL DATE WITH DAY] [!FIRM1] [!PLAINTIFF-NAME]	1. Holds place for text. 2. Pre-defined fields fill in automatically. 3. Several options for scanning. 4. Fill In Field command fills in matching fields in all locations in that job. (User defined fields can also easily be replaced with text for a one-location entry.) 5. Field List Group fields and user defined fields information stored for re-use. Once value is typed, never has to be typed again; quick selection from a list. 6. Use in headers/footers.	

⇨ **Predefined fields**

Pre-defined fields are placeholders for information that Case CATalyst will fill in automatically based on information stored in the system or the document: page numbers, dates and times.

FIELD	WHAT IT DOES	WHERE IT'S COMMONLY USED
Page Number 1, 2, 3…	Display page number using numerals.	Header/footer
Page Number A, B, C…	Display page number using upper case letters.	Header/footer
Page Number a, b, c…	Display page number using lower case letters.	Header/footer
Page Number I, II, III…	Display page number using upper case Roman numerals.	Header/footer
Page Number i, ii, iii…	Display page number using lower case Roman numerals.	Header/footer
Total Pages in Document	Display last page number of document using same format and case as other page numbers.	Header/footer, include files
Total Pages in Section	Display last page number of current section of document.	Header/footer, include files
First Page	Display first page number of the current job. For example, if Set Page/Paragraph Number has been used to change the first page of the current job to page 201, inserting the [!First Page] field would cause 201 to display.	Header/footer, include files or definitions
First Page in Section	Display first page number of the section where the field is inserted. For example, if the cursor is in Section 2, and the first page number of that section is 1, inserting the [!First Page in Section] field will cause 1 to display.	Header/footer, include files or definitions
Last Page	Display last page number of the current job. For example, if Set Page/Paragraph Number has been used to change the first page of the current job to page 201 and there are 30 pages in the job, inserting the [!Last Page] field would cause 230 to display.	Header/footer, include files or definitions
Last Page in Section	Display last page number of the section where the field is inserted. For example, if the cursor is in Section 2, which contains 15 pages and the first page number of that section is 1, inserting the [!Last Page in Section] field will cause 15 to display.	Header/footer, include files or definitions
First Indexed Word on Page	Display first word on Concordance Index page.	Header/footer of a Concordance Index
Last Indexed Word on Page	Display last word on Concordance Index page.	Header/footer of a Concordance Index

Predefined fields *(continued)*

FIELD	WHAT IT DOES	WHERE IT'S COMMONLY USED
Current Date	Displays the current system date in MM/DD/YYYY format. Updates each time document is opened. For example, if the file is opened on March 2, 2019, Current Date field displays as 03/02/2019. If the same file containing Current Date field is opened again on March 14, 2019, the Current Date Field displays as 03/14/2019.	Most typically used on documents like letters or invoices created in CATalyst. Not used to fill in transcript/job dates.
Current Date with Words	Same as Current Date; however displays in Month DD, YYYY format.	
Current Time	As with Current Date fields, displays the current system time in HH:MM:SS AM/PM format.	Same as with Current Date fields.
Current Year	Displays the current year in YYYY format. Updates each time the document is opened.	Include files, definitions or header/footer.
Seal Date when Included (static date set when included)	When a file containing this field is included into another job, the field fills in with the system date at the moment the file was included and then held. Displays, in ordinal day of Month, Year format (e.g. 4th of June, 2019).	Include files
Seal Date with Day when included (static date set when included)	When a file containing this field is included into another job, the field fills in with the system date at the moment the file was included and then held. Displays in ordinal day followed by the words "day of" Month, Year format (e.g. 4th day of June, 2019).	Include files
Seal Date	Date is taken from the system date the moment the field is brought into the text file and then held; displays the same date each time the file is opened. Displays in ordinal day of Month, Year format (e.g. 4th of June, 2019).	Definitions (dictionary entries) or EZ Text.

(**Note**: The values for these fields are filled in immediately when the field is inserted into a file in Edit. The values are held and do not change if a file with the filled-in field value is included or copied/pasted into another file.) |
Seal Date with Day	Date is taken from the system date the moment the field is brought into the text file and then held; displays the same date each time the file is opened. Displays in ordinal day, followed by the words "day of" Month, Year format (e.g. 4th day of June, 2019).	
Static Date	Date is taken from the system date the moment the field is brought into text file and then held; displays the same date each time file is opened. Displays in MM-DD-YYYY format.	
Static Date with Words	Same as Static Date; however, date displays in Month DD, YYYY format.	
Static Time – 12 H:M:S	Time is taken from the system time the moment field is brought into the text file and then held; displays the same time each time the file is opened. Displays in 12-hour format with seconds (e.g. 10:42:36 a.m.).	
Static Time – 12 hour	Same as Static Time 12 H:M:S, but displays in 12-hour format without seconds (e.g. 10:42 a.m.)	
Static Time – 24 hour	Same as Static Time – 12 hour; time displays in 24-hour format (HH:MM).	

Predefined fields *(continued)*

FIELD	WHAT IT DOES	WHERE IT'S COMMONLY USED
Transcript Start	This field can be inserted anywhere in the transcript to indicate which page Case CATalyst should consider the first transcript page (vs. the first physical page in the transcript or a section). When inserted into transcript text, it is inserted as Hidden Text, as in most cases, you will not want the value to display or print in the transcript text. If you do want to have the value display on a transcript page (for example, if you want to have text on a certificate page such as "the foregoing testimony on pages 4 through 146"), you can fill in another field (e.g. a User defined field such as [!DEPO START PAGE]) with the Transcript Start field as the value. The page number where the Transcript Start field was inserted will appear as the value on the page. When inserted into a Job Report Template, the value displays in the text.	
Transcript End	This field can be inserted anywhere in the transcript to indicate which page Case CATalyst should consider the last transcript page (vs. the last physical page in the transcript or a section). As with Transcript Start, this field is automatically inserted as Hidden Text. If you do want to have the value display on a transcript page, you can fill in another field (e.g. a User defined field such as [!DEPO END PAGE]) with the Transcript End field as the value. The page number where the Transcript End field was inserted will appear as the value on the page. When inserted into a Job Report Template, the value displays in the text.	Include files and/or job report templates
Transcript Total	This field can be inserted anywhere in a document to calculate the total number of pages, based on the Transcript Start and Transcript End fields. The value of Transcript Start subtracted from the value of Transcript End plus one equals the value of Transcript Total. (For example, if Transcript Start is on page 1 and Transcript End is on Page 10, the value of Transcript Total is 10 (10-1+1 = 10). NOTE: It is possible to use the Transcript Total field, even if no Transcript Start or Transcript End fields are used. If no Transcript Start field is used, Case CATalyst will determine the first page of the transcript at the point where underlying steno in the file exists. If no Transcript End field is used, Case CATalyst will determine the last page of the transcript at the point where underlying steno in the file stops.	

✎ **TIP:** You can specify a preferred separator and am/pm format for time fields in Field Options.

1. Open Field Options via *one* of the following methods:

   ✓ From Manage Jobs, click **Tools**, **Options**, **Edit**, **Fields…** (**Alt+t**, **o**, **e**, **f**).

   ✓ From Edit, click **Tools**, **Options**, **Fields…** (**Alt+t**, **o**, **f**).

2. At **Time separated by**, select **Colon** (:), **Period** (.) or **None**.

   ✓ Example of time separated by colon: 8:45 a.m.

   ✓ Example of time separated by period: 8.45 a.m.

   ✓ Example of time separated by none: 0845

   ? **NOTE:** *None* is typically selected in transcripts where time is expressed as "military time."

3. At **Time display morning/afternoon**, select **a.m./p.m.** or **am/pm**.

   ? **NOTE:** If you want the A.M./P.M. or AM/PM to appear all capped, surround the field with <All Caps On> and <All Caps Off> format symbols.

⇨ **Field List Group fields**

Appearance information (attorney names, firm names, addresses, phone numbers, fax numbers, email addresses, etc.) varies from transcript to transcript, but when working with the same clients, may be used in more than one job.

Field List Group fields are used as placeholders for appearance information. Here is an example of Field List Group fields used for appearances:

APPEARANCES

For the Plaintiff:	[!FIRM1] BY: [!ATTORNEY1] [!ADDRESS-A1] [!ADDRESS-B1] [!CITY1], [!STATE1] [!ZIP1] [!PHONE NUMBER1]
For the Defendant:	[!FIRM2] BY: [!ATTORNEY2] [!ADDRESS-A2] [!ADDRESS-B2] [!CITY2], [!STATE2] [!ZIP2] [!PHONE NUMBER2]

You can use any or all of these fields in include files formatted to fit your style/layout.

When you fill in the information for a group, all of that information is stored together in a file called the Fill-In-Field List. The Fill-In-Field List is created automatically with a new user and the information stored in that file is available to all jobs in the same user. You can also create Case-specific Fill-In-Field List files.

The next time you need to use the same information, you only have to select information for one of the fields, and all related information from that group will fill in automatically.

Case CATalyst comes with five pre-set Field List Groups, with 12 standard fields in the group, as shown on the next page. You can add additional Field List Groups as needed (for when you have more than five appearances).

ATTORNEY1	ATTORNEY2	ATTORNEY3	ATTORNEY4	ATTORNEY5
FIRM1	FIRM2	FIRM3	FIRM4	FIRM5
ADDRESS-A1	ADDRESS-A2	ADDRESS-A3	ADDRESS-A4	ADDRESS-A5
ADDRESS-B1	ADDRESS-B2	ADDRESS-B3	ADDRESS-B4	ADDRESS-B5
CITY1	CITY2	CITY3	CITY4	CITY5
STATE1	STATE2	STATE3	STATE4	STATE5
ZIP1	ZIP2	ZIP3	ZIP4	ZIP5
PHONE NUMBER1	PHONE NUMBER2	PHONE NUMBER3	PHONE NUMBER4	PHONE NUMBER5
FAX1	FAX2	FAX3	FAX4	FAX5
EMAIL1	EMAIL2	EMAIL3	EMAIL4	EMAIL5
SPEAKER1	SPEAKER2	SPEAKER3	SPEAKER4	SPEAKER5
ATTORNEY SORT1	ATTORNEY SORT2	ATTORNEY SORT3	ATTORNEY SORT4	ATTORNEY SORT5

⇨ How to create additional custom Field List Group fields:

• Additional attorney fields

For example, suppose the plaintiff is represented by Robert Smith, Dana Weissman and Barbara Jackson from the firm Smith & Associates. Rather than use a standard one-attorney appearance, e.g.

[!FIRM1]
BY: [!ATTORNEY1]
[!ADDRESS-A1]
[!ADDRESS-B1]
[!CITY1], [!STATE1] [!ZIP1]

and then manually type in the second and third attorney names, the reporter or scopist can add additional fields to the appearance:

[!FIRM1]
BY: [!ATTORNEY1]
        [!ATTORNEY1A]
        [!ATTORNEY1B]
[!ADDRESS-A1]
[!ADDRESS-B1]
[!CITY1], [!STATE1] [!ZIP1]

When the reporter or scopist scans to Firm1 and selects Smith & Associates, the firm's name and address information will be filled in. The [!ATTORNEY1], [!ATTORNEY1A] and [!ATTORNEY1B] fields will not be filled in.

When prompted to fill in those fields, the Select List will display all attorneys previously entered into the Fill-In-Field List (or Fill-in-Field_Case file) for Smith & Associates.

To create additional attorney fields:

1. In Edit, select **Edit**, **Insert**, **Field** (**Alt+e**, **i**, **f**).

2. Click **New Field**.

3. Type ATTORNEY followed by the number of the list group and then an alphabetic letter or word. For example, if creating an additional attorney field to be associated with ATTTORNEY1, FIRM1, CITY1, etc., type **ATTORNEY1A**.

    ? **NOTE:** Any Field List Group field followed by a number and then followed by any text, no matter what, will be associated to the first set of numbers in the string. For example, you could name the additional field **ATTORNEY1_SECONDCHAIR**, **ATTORNEY1A** or **ATTORNEY1-ADDL** and they would be associated with FIRM1.

    ? **NOTE:** You are not limited with regard to the number of additional attorneys per firm. For example, if you had four attorneys from the same firm, you could add [!ATTORNEY1A], [!ATTORNEY1B] and [!ATTORNEY1C] fields.

When editing the include file or transcript that contains the appearance information, insert the additional attorney field in the appropriate location.

• Additional custom fields for all field groups

When listing appearances, some reporters are required to fill in information beyond the items provided in the standard field list group fields. For example, some reporters are required to list the attorney's bar number. Some reporters like to include the attorney's web site address. Some reporters would prefer to have a third field for additional address information.

To create additional fields, you will insert a new column in the Fill-In-Field List in the System Files case. Once the column is inserted, an associated field will automatically be created for each field list group.

1. From Manage Jobs, open the **System Files** case, and then double click **Fill-In-Field List**.

2. Click **Edit**, **Insert Column** or right click any column heading and then click **Insert Column**.

3. Type a name for the new field in the Insert Column dialog, and then click **OK** (**Enter**).

⇨ **How to create a Case-specific Fill In Field List**

1. Create and/or open the case in which you want to create a case-specific Fill In Field List.

   ✍ **NOTE**: This option is not available at the main level of your user in Manage Jobs. You must be inside a case.

2. Click **File**, **New**, **Fill In Field List**, **Case Fill In Field List**.

3. At the Create New Document dialog, click **Open** (**Enter**) to accept the default name **Fill-In-Field List_Case**.

   ✍ **NOTE**: Do not rename the file. The file must be named Fill-In-Field List_Case for Case CATalyst to recognize the file.

4. If desired, you can populate the Fill-In-Field List_Case file by copying and pasting entries from the Fill-In-Field List file in the System Files case, or by pressing **Ctrl+i** and then entering values.

5. Close and save the file via any <u>one</u> of the following methods:

   ✓ Right click the Fill-in-Field_Case tab and select **Save & Close**.

   ✓ Click **File**, **Close** (**Alt+f**, **c** or press **Ctrl+F4**) and click **Yes** (**Enter**) when prompted to save the changes.

   ✓ Click the ━ ⊟⊗ Close button on the menu bar and click **Yes** (**Enter**) when prompted to save the changes.

⇨ **User defined fields**

User defined fields are custom fields that you create to hold the place for any other information appearing on a title page, sworn statement, certificate or other include file that you will fill in manually or select for each job, such as plaintiff, defendant, county, judge, witness name, etc.

For example, if you work in more than one county, then on a title include file page, you might create a field to hold the place for the county name:

SUPERIOR COURT OF THE STATE OF CALIFORNIA

IN AND FOR THE COUNTY OF [!COUNTY]

There are also seven User defined fields created for you by Case CATalyst.

Five are creation day and creation date fields in various formats. Like pre-defined fields, they fill in automatically based on the date that the job is created, but these values can be edited

like any other User defined field:

FIELD	WHAT IT DOES	WHERE IT'S USED
CREATION DATE	Display the date the file was first opened/created in MM/DD/YYYY format.	Include files, definitions, or header/footer
CREATION DATE IN WORDS	Display the date the file was first opened/created in Month, DD, YYYY format.	
CREATION DAY OF WEEK	Display the day of the week the file was first opened/ created.	
CREATION DATE ORDINAL	Display the date the file was first opened/created in DDth of MONTH, YEAR format (e.g. 14th of May, 2019).	
CREATION DATE ORDINAL WITH DAY	Display the date the file was first opened/created in DDth day of MONTH, YEAR format (e.g. 14th day of May, 2019).	

Two additional fields are time fields for the job start time and job end time. These values are set by the *Set Job Start Time Field* and *Set Job End Time Field* functions which can be executed from the Special Edit menu, from keyboard map assignments, or by writing steno defined as these commands. The fields can also be filled in manually and edited as preferred.

FIELD	WHAT IT DOES	WHERE IT'S USED
JOB START TIME	Fills in with the job's start time.	Include files, definitions, or header/footer
JOB END TIME	Fills in with the job's end time.	

⇨ **How to insert fields into include files, definitions and headers/footers**

1. When the cursor is positioned in transcript text, click **Edit**, **Insert**, **Field…** (**Alt+e**, **i**, **f**).

   ✎ **TIP:** You can also assign the **Insert Field** command to a key in your keyboard map.

2. When the cursor is positioned in the text field of any dialog box, click the **Insert Field** button.

3. When the *Insert Field* dialog appears, select a predefined field, Field List Group field, or previously-entered user defined field from the Insert Field dialog box.

   To create a new user defined field, click **New Field** (**Alt+n**); type a name for the field, and then press **Enter**.

⇨ **How to navigate to fields in Edit**

- **Scan and Fill In Fields**

This scan command will move the cursor to the next empty field, and after each field is filled in, it will immediately scan to the next field and prompt you to fill it in. This repeats automatically until all empty fields are filled in.

Click **Special Edit, Scan and Fill In Fields** (**Alt+s**, **L**).

☝ **TIP:** You can assign the *Scan and Fill in Next Field* command to a key in your keyboard map*.*

- **Scan For Options – Field (Empty), Fill In Fields**

Setting this option will cause the Scan Forward (**F8**) and Scan Backward (**Shift**+**F8**) commands to land on any fields that have not been filled in.

1. In Edit, click **Tools, Options, Scan For…** (**Alt+t, o, c**).

2. Click **Field (Empty)** (**Alt+f**).

3. Optional: Click **Fill In Fields** (**Alt+e**).

   If you select the Field (Empty) option but do not select the Fill In Fields option next to Field (Empty), Scan Forward or Scan Backward will stop on a field but will not prompt you to fill in that field.

   If you select both Field (Empty) <u>and</u> Fill In Fields, Scan Forward or Scan Backward will stop on the next or previous field and will prompt you to fill in that field. Unlike the
   Scan and Fill In Fields command, it will not automatically scan to the next field after you fill in the current field (and/or skip over other items such as untranslates, conflicts, etc. on which Scan Forward or Scan Backward are set to stop in *Scan For Options*).

4. Click **OK** (**Enter**).

- **Hotspots Pane – Empty Fields**

Empty (a.k.a. "undefined" or not-filled-in) fields can be listed in the Hotspots pane in Edit. This can make it very easy to view and navigate to unfilled-in fields.

✓ Set the Hotspots pane options to show Undefined Fields.
   1. In Edit, click **View**, **Panes**, **Hotspots** (**Alt+v**, **e**, **o**).
   2. Click the **Options** button on the *Hotspots* pane toolbar.

3. Click **Show undefined fields** and select **Yes**.

✓ To view a list of empty fields while editing a job, click **View**, **Panes**, **Hotspots** (**Alt+v**, **e**, **o**). Empty fields are shown in blue.

✓ To navigate to an empty field, double click an empty field listed in the Hotspots pane. The cursor will move to the empty field and the Fill In Field dialog will display.

⇨ **How to fill in fields**

• **Pre-defined fields will be filled in automatically.**

• **Field List Group Fields and user defined Fields**

If you do not use the Scan and Fill In Fields command, or scan to a field and automatically receive a prompt to fill in the field, you will use the Fill In Field function to open the Fill In Field dialog. Use <u>one</u> of the following methods:

✓ Position the cursor immediately before the field to be filled in. Click **Special Edit, Fill In Field** (**Alt+s**, **n**).

✓ **Right click** the field and then select **Fill In Field**.

✓ **Double click** the field.

✎ **TIP:** You can also assign the Fill In Field function to a key in your keyboard map.

Typing text for a field value

The first time text is entered for either a Field List Group or a user defined field, it will be typed. If the field has been filled in before, the information will appear in the Select List and can be selected from the list, rather than typed.

✓ Field List Group fields (appearance data)

▪ Entering values for new Field List Group Fields while editing a job:

1. Click **New List Entry** (**Alt+n**).

   ✎ **NOTE:** If you are attempting to create a New List Entry and the Fill-In-Field List is open, you will be prompted to close the Fill-In-Field List file prior to adding a New List Entry.

2. Type in all data for the appearance at the prompts. Press **Tab** to move between prompts.

3. Click **OK** (**Enter**).

   ✎ **TIP:** Fill in data for all of the available fields; not just the fields you plan to

use for appearances. That information will be stored in the Fill-In-Field List database file which can be used as a reference resource.

4. Click **OK** (**Alt+o**) to enter the new information into the transcript.

▪ Entering values for new Field List Group Fields directly into the Fill-In-Field List file:

1. Open the System Files case, and then double click the **Fill-In-Field List** file.

2. Click ⊞ the **Insert** button on the toolbar (**Ctrl+i**).

3. Type in all data for the appearance at the prompts. Press **Tab** to move between prompts.

4. Click **OK** (**Enter**).

✎ **NOTE:** ATTORNEY is used to fill in the full name of the attorney in the appearances page.

The SPEAKER field can be used as a placeholder for a speaker ID in Colloquy or By Lines (most typically used by reporters who do not make use of the Create EZ Speakers Entries feature). It can also be used as a placeholder for a salutation in letters to attorneys (e.g. in job reports).

✎ **NOTE:** The Attorney fields can be displayed in Last Name, First Name order. The "Sort attorney names using Attorney Sort column" option is located in Manage Jobs via **Tools**, **Options**, **Edit**, **Field…** (**Alt+t**, **o**, **e**, **f**), or in Tran & Edit or Edit via **Tools**, **Options**, **Field…** (**Alt+t**, **o**, **f**). By default, it is set to Yes. If you prefer attorneys to be listed in First Name, Last Name order, select No for this option.

When you open an existing Fill In Field List, you will see a column labeled Attorney Sort, and you'll see the attorney's name shown as Last Name, First Name.

If *Sort using Attorney Sort* is selected, the cursor will default into the Select List, even if the cursor typically goes to *Field Value*. Just type the first letter of the last name and it brings you to that letter of the alphabet. Or, you can scroll through the Select List and select the desired name.

The name will be entered in First Name, Last Name order.

If you need to add a new attorney, press **Shift+Tab** to move the cursor back to Field Value and type a new name.

☝ **TIP:** You should review the entries in an existing Fill-In-Field List to make sure each name is sorted correctly. For example, let's say you have an attorney JOHN VAN DEN TILLAAR listed in the ATTORNEY column. CATalyst will sort the name as TILLAAR, JOHN VAN DEN. Modify the entry and change the order as needed.

? **NOTE:** There is a default list of suffixes (i.e. Jr., Sr., Esq.) that CATalyst will ignore when filling in the Attorney Sort column.

✎ **TIP:** When the Fill In Field dialog box for an Attorney field is open, (Attorney Sort Active) is displayed next to Select List, to show that the sort feature is being used. If the option is set to No, then (Attorney Sort Active) is not displayed next to Select List.

✓ User defined fields

User defined fields are stored in a job history file, case history file, or the System Files case history file, depending on the "scope" set for the field. In addition to information storage location, the "scope" determines whether previously typed field values will be displayed in the Select List of the Fill In Field dialog box.

1. Click **Set Scope** (**Alt+p**).

2. Select the preferred scope: User, Case or Job.

   ▪ Set a "User" scope for user defined fields with values that may be used in any future job. Examples of user defined fields reporters have created that would benefit from a User scope include: [!COUNTY], [!JUDGE], and [!TAKEN PURSUANT TO].

   ▪ Set a "Case" scope for user defined fields with values that would only be used in the transcripts in a particular case. Examples of user defined fields reporters have created that would benefit from a Case scope include: [!PLAINTIFFNAME], [!DEFENDANTNAME], [!CASE NUMBER] and [!OFFICER-NAME].

   ▪ Set a "Job" scope for user defined fields with values that would only be used in the current job. Examples of user defined fields reporters have created that would benefit from a Job scope include: [!WITNESS], [!DEPO LOCATION] and [!START TIME].

3. Type the text.

4. Click **OK** (**Enter**).

✎ **TIP:** Typically fields have the same value throughout the entire file. However, there may be times when you want to fill in a field with a value on one page and then fill in the same field with a different value on a different page. Rather than use the Replace command and type text or use a lengthy conflict as a placeholder, you would prefer to use Fill In Field so that you can select field values stored in the Select List.

When you need to fill in a user defined field with a value but NOT have it fill in all occurrences of the field, select **Replace Field with Text** (**Alt+r**).

Selecting text that has been previously typed

✓ Double click the item from the Select List or click the item once and then click **OK** (**Enter**).

   ☝ **TIP:** If there are many items in the Select List and you do not immediately see the item in the Select List, you can either scroll to the item or press Tab to move the cursor from Field Value to the Select List area and begin typing the text. The cursor will move to the entry that you type, and you can then press Enter to insert that field value.

   ✎ **NOTE:** If you start typing text with the cursor in Field Value, you MUST type the text in the same case as the entry in the select list.

✓ **Use Other Field Values**

This command will enable you to use the values for fields you have completed (filled-in) in another job. For example, if you have two jobs which are using the same title/caption, you can simply include the standard blank title page and select Use Other Field Values, select the job that shares those values and have them automatically filled in.

1. Click **Special Edit**, **Use Other Field Values…** (**Alt+s, h**).

2. Double-click the job which contains the filled-in fields that should be applied to the current job, or select the job and then click **Open** (**Enter**).

3. Select the fields that you wish to apply. You can use Ctrl+click to select (or de-select) multiple non-consecutively listed fields, Shift+click to select multiple consecutively listed fields, or click **Select All** to select all fields.

4. Click **OK** (**Enter**).

⇨ **Filling in a user defined field with a formula**

You can fill in a user defined field with formulas and functions very similar to those used in an Excel spreadsheet. This means that instead of filling in a value with fixed text (for example, filling in an [!AMOUNT DUE] field by typing $500), the value of the field is filled in with a formula that calculates the correct value (for example, you could fill in the [!AMOUNT DUE] field with a formula that multiplies the total number of transcript pages by a page rate, such as: =PRODUCT ([!Transcript Total], [!PAGE RATE]).

The main difference between formulas and functions used in Case CATalyst vs. Excel is that in Excel, calculations are most commonly performed by adding, subtracting, multiplying or dividing the value of table cells. In Case CATalyst, calculations are performed by adding, subtracting, multiplying or dividing the values of fields.

Before you begin to use this feature, it will be very important to determine:

- **What fields you will need to fill in with formulas**

Any items that you will want to add, subtract, multiply, divide, etc. will need to be created as user defined fields and inserted into an include file or job report template. A few examples of these items might include:

[!Page Rate – Original Regular]
[!Page Rate – Original Expedite]
[!Page Rate – Original Daily Copy]
[!Page Rate – Copy Regular]
[!Page Rate – Copy Expedite]
[!Page Rate – Copy Daily Copy]
[!RT-CaseViewNet Rate]
[!ASCII Charge]
[!Compressed Charge]

- **The correct "grammar" for the function.**

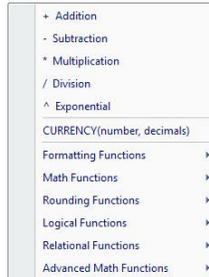 ✓ Basic things to know about formula structure:

  - Every formula must begin with an = (equal symbol).

  - The = symbol is typically followed with a command function, such as SUM (to add a series of numbers) or PRODUCT (to multiply a series of numbers) or CURRENCY (to display a number as a dollar amount). If all you need to do is a simple equation that will be performed with an operator (+ to add, - to subtract, * to multiply or / to divide) you can skip this step and immediately follow the = with an open parentheses.

  - The = symbol and function, or = symbol alone, is followed by an open parentheses symbol.

  - The (symbol is followed by the first number to be calculated. This may be an actual number, or it may be a field, which in turn will have its own value. For example, the first number you may have in a formula might be [!Transcript Total] which is the total number of pages in a transcript. This may also be a series of numbers or fields that are calculated separately and then acted upon by the function.

  - If there is a function named, then the first number is followed by a comma. Think of the comma as meaning "then" as in "do this, then do that."

    If there is no function named, then enter the mathematical operator (+, -, * or /).

  - The comma or mathematical operator is followed by the second number. Again, this may be an actual number or it may be a field, which in turn has its own value. For example, the second number you might have in a formula might be [!Original – Expedited Rate]. As with the first number, this may also be a series of numbers or fields that are calculated separately and then acted upon by the function.
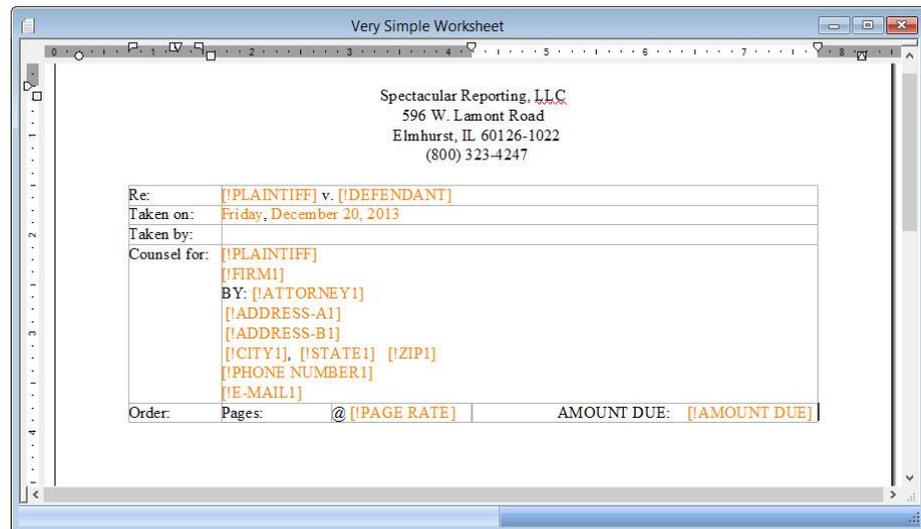
- The final number is followed by a close parentheses symbol.

✓ To fill in a field with a formula or function:

1. Open the *Fill In Field* dialog box for the field that you want to fill in with a formula.

   ? **NOTE**: You will fill in the field value with a formula in the original include file or job report template. This is done once.

2. Do <u>one</u> of the following:

   - Type the formula.

   - Click the [F(x) >] icon.

     A list of common functions and mathematical operators is displayed:


     ```
     +  Addition
     -  Subtraction
     *  Multiplication
     /  Division
     ^  Exponential
     CURRENCY(number, decimals)
     Formatting Functions        ▶
     Math Functions              ▶
     Rounding Functions          ▶
     Logical Functions           ▶
     Relational Functions        ▶
     Advanced Math Functions     ▶
     ```

     Click the desired function or action to assist in building the desired formula.

     EXAMPLE: Let's say you have a job report template where you want to list the total number of transcript pages, multiply that number by a page rate and then display the total amount due. Let's say that this is an example of what the job report template currently looks like:

     Very Simple Worksheet

     Spectacular Reporting, LLC
     596 W. Lamont Road
     Elmhurst, IL 60126-1022
     (800) 323-4247

 | | |
     |---|---|
     | Re: | [!PLAINTIFF] v. [!DEFENDANT] |
     | Taken on: | Friday, December 20, 2013 |
     | Taken by: | |
     | Counsel for: | [!PLAINTIFF]
[!FIRM1]
BY: [!ATTORNEY1]
[!ADDRESS-A1]
[!ADDRESS-B1]
[!CITY1], [!STATE1] [!ZIP1]
[!PHONE NUMBER1]
[!E-MAIL1] |
     | Order: | Pages: @ [!PAGE RATE]   AMOUNT DUE: [!AMOUNT DUE] |

Here are the steps you might use to modify this job report template and use fields with formulas that will automatically fill in the correct values when the job report is built.

1. Open the job report template (in the Job Report Templates case).

2. Position the cursor to the right of Pages. Click **Edit**, **Insert**, **Field**, and insert the **Transcript Total** pre-defined field.
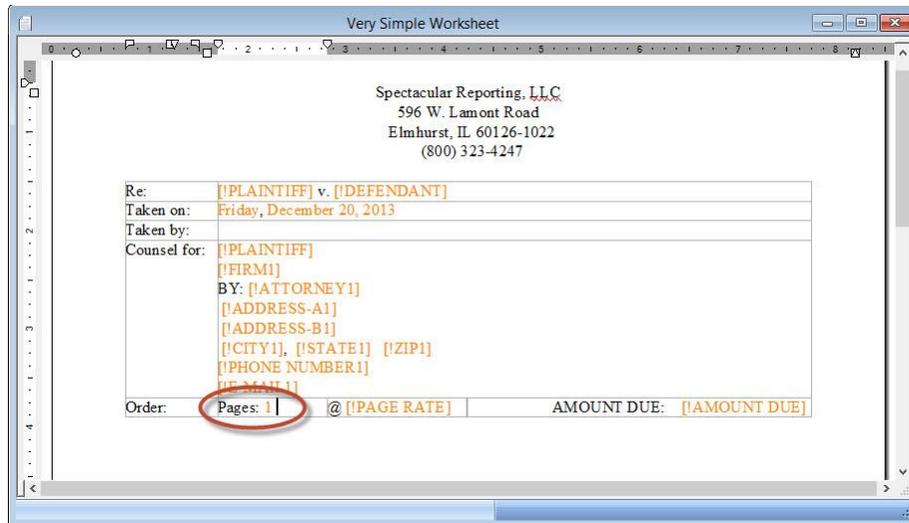

?   **NOTE**: The value for the [!Transcript Total] field is filled in with 1 in the job report template, because the file only has one page. When a job report is created using this template, the correct value for total number of transcript pages will be displayed.

3. Scan to or double click the [!PAGE RATE] field to fill it in.

4. Click **Set Scope**, select **User** and press **Enter**. (This ensures that the field value will be available wherever the field value's formula needs to be used, not just in this job report template, and not just in the Job Templates case).

5. With the cursor in the Field Value click F(x) >, and then click **CURRENCY (number, decimals)**.

6. Position the cursor in between the open and close parentheses symbols and type the correct page rate value.

7. Click **OK**.
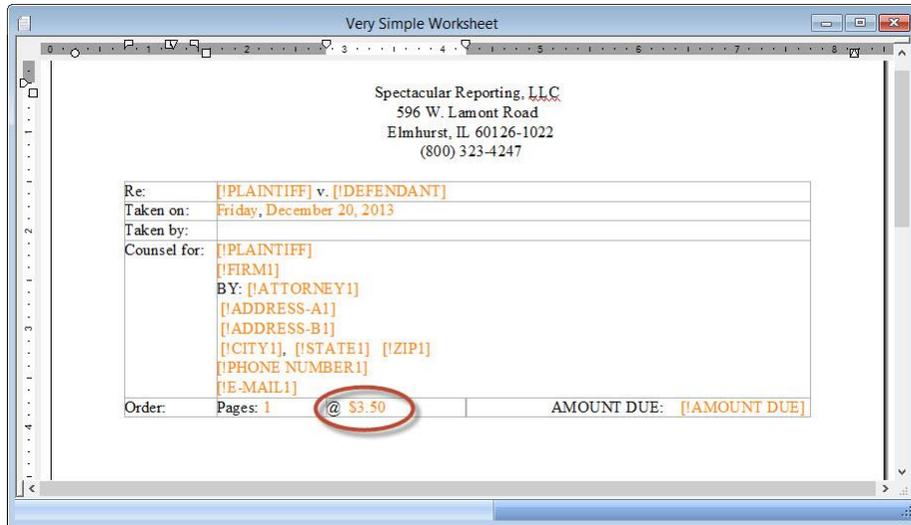
8. Scan to or double click the [!AMOUNT DUE] field.

9. Click **Set Scope**, select **User** and press **Enter**. (This ensures that the field value will be available wherever the field value's formula needs to be used, not just in this job report template, and not just in the Job Templates case).

10. With the cursor in the Field Value click F(x) >.

11. Click **Math Functions** and then click **CURRENCY (number, decimals)**.

12. The cursor should be positioned between the open and close parentheses symbols. Click **Insert Field**, select the **Transcript Total** pre-defined field and click **OK**.

13. Type an asterisk. (The asterisk is the symbol used for multiplication. You could also click F(x) > again and select * Multiplication.)

14. Click **Insert Field**, select the **PAGE RATE** user defined field and click **OK**.
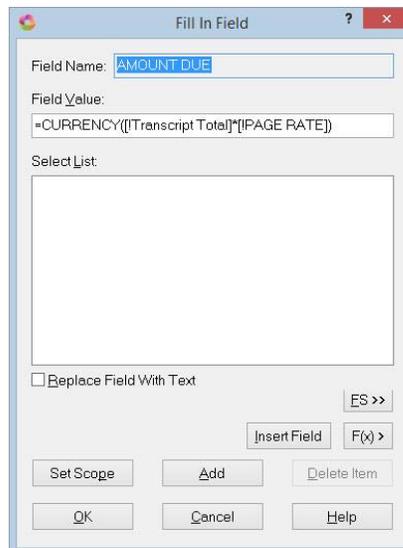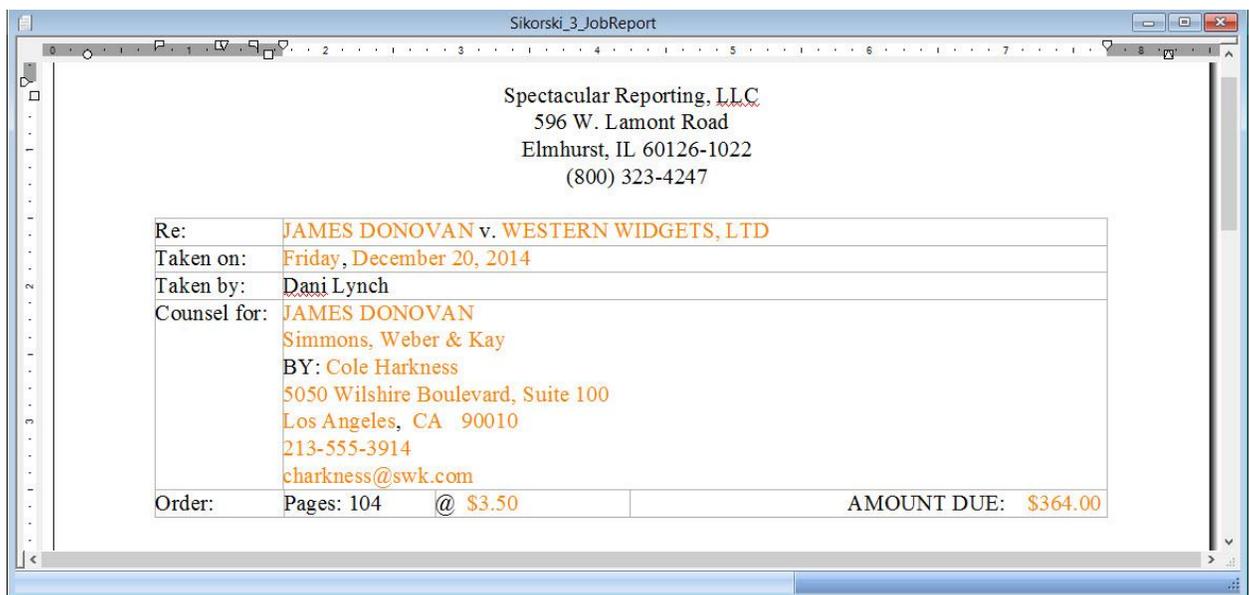
15. Click **OK** to close the Fill In Field dialog.

16. As with the previous fields, a temporary value, based on the information in the job report template is filled in. When you build a job report, the values will be correct
    for the transcript.
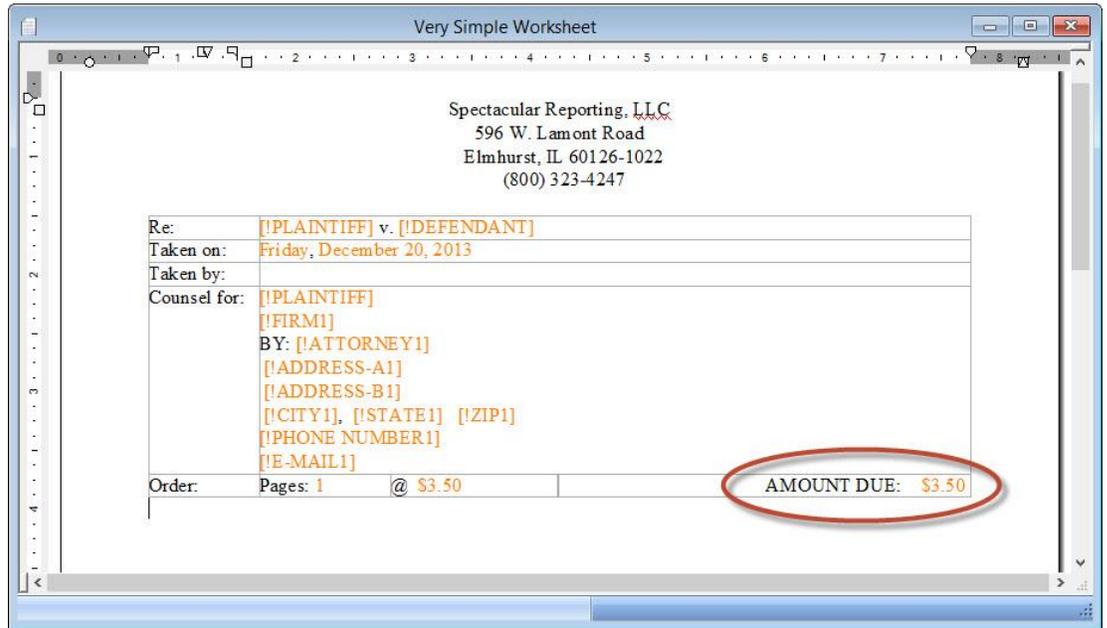
17. Close and save the job report template.

The next time the reporter creates a job report, the results will look something like this:

TIPS FOR FIELDS

Automatic wrapping for field text

If any text on an include page should automatically wrap to the next line and be block indented, you should use a user defined Paragraph or Table to cause that automatic wrapping.

This ensures that when you fill in a Field, the text will wrap as preferred. You should never need to use <New Line>, <New Line Paragraph> or <Tab> format symbols when filling in a field to create preferred formatting results.

Initial Capped vs. ALL CAPPED

If you only work for <u>one</u> firm or court, and entries for names, addresses, etc. are always shown in either Initial Caps or ALL CAPPED text when filling in the field value, type the text in the same case that should appear in the transcript.

If you work for <u>more than one</u> firm or court and one firm or court's preference is to show text in Initial Caps but another firm or court's preference is to show text in ALL CAPS, type the text for the field value in Initial Caps. Then, on the include page or in the definition where the field will appear, in any place where the text for that field should appear in ALL CAPS, surround the field(s) with <All Caps On> and <All Caps Off> format symbols.

👉 **TIP:** Mark the field that should appear in all caps and press F4 V, or position the cursor before the field, press F4 V to insert <All Caps On>, then position the cursor immediately after the field and press F4 v to insert <All Caps Off>.

Clear Group for Field List Group fields

If you pick the wrong value for a Field List Group and subsequently, all the information filled in for that group is incorrect, you can use the Clear Group function in the Fill In Field dialog box to remove the values.

1. Position the cursor on one of the fields in the group that have been filled in incorrectly.

2. Double click the field, or right click and select **Fill In Field** or click **Special Edit**, **Fill In Field** (**Alt+s**, **n**).

3. Click **Clear Group** (**Alt+r**).

4. Select the preferred value for the field list group field.

5. Click **OK** (**Enter**).

Duplicate entries for Field List Group fields

If you have previously filled in appearance data for a firm and you wish to duplicate it and just change some of the items, e.g. the attorney name or location or email address; you can quickly enter this additional information directly into the Fill In Field List file, or you can enter this information while filling in the field list group information in Edit.

⇨ To add a new entry that reuses existing information from another entry directly into the Fill In Field List file:

1. Open the **Fill In Field List** file (located in the System Files case).

2. Select (click) the entry to be modified.

3. Click **Modify** (**Ctrl+m**).

4. Type the new information in the appropriate field.

5. Click **Save as New** (**Alt+s**).

⇨ To add a new entry in Edit that reuses existing information from another entry while filling in fields in Edit:

1. Navigate to one of the field list group fields in the item for which you want to enter updated information. If the field groups are not yet filled in with existing information, open the Fill In Field dialog for one of the group's fields and select the appropriate item from the list.

2. Double click one of the fields in that group for which you would like to enter new information, both in the job and in a new Fill In Field List file entry.

3. Click New List Entry. *(Do not type information into the Fill In Field dialog!)*

4. The previously existing information for that entry will be present. Type the new information you want for the new entry.

5. Select the *Apply this entry to the current Field Group* option.

6. Click **OK** (**Enter**) to close the Insert Entry dialog.

7. Click **OK** (**Alt+o**) to close the Fill In Field dialog.

Automatically delete unused Field List Group fields

If some of your appearances use two fields for addresses (e.g. street address in [!ADDRESS-An] and suite number in [!ADDRESS-Bn]) and some only make use of one field for addresses:

⇨ In the include file containing your appearances, use both fields.

⇨ Use the Scan and Fill In Fields command to scan to and fill in appearances data.

The Scan and Fill In Fields command will recognize when one of the fields in a filled-in appearance is left blank, and will prompt you to enter a value for that empty field. When you do not enter a value and press Enter or click OK, the Scan and Fill In Fields command will delete the empty field.

Additional entries for user defined fields

When filling in a value for a user defined field, you may wish to add a number of items into the Select List at the same time so that you can simply select them from the Select List in the future, rather than add them one at a time, as they come up in a job.

1. After opening the Fill In Field dialog, type text at the Field Value prompt.

2. Click **Add** (**Alt+a**) to add it to the Select List *without* inserting it into the transcript text.

3. Repeat the above two steps as many times as needed/desired.

Define field values before translation

There may be occasions (e.g. realtime, same-day, daily or expedited delivery) when you do not wish to wait until editing a job post-translation to fill in field values.

1. After opening the Translate dialog and naming the job, click the **Define Fields** button.

2. Do <u>one</u> of the following:

   • If the field values exist in another job, click **Use Other…** (**Alt+u**), then select the job which contains those field values, select any or all values and then click **OK** (**Enter**).

   • If the field values have not yet been entered in any other job, click the field you want to fill in, then click **Fill In Field** (**Alt+f**). When all values have been entered, click **OK** (**Alt+o**).

Retain fields when pasting

When cutting or copying and then pasting text containing fields in Edit, by default, Case CATalyst does not retain the functionality of fields; it converts the copied/pasted field to plain text. If you would prefer fields to retain their values and functionality when pasted, this option is available in Field Options.

1. Open Field Options via <u>one</u> of these methods:

   - From Manage Jobs, click **Tools**, **Options**, **Edit**, **Fields…** (**Alt+t**, **o**, **e**, **f**).

   - From Edit, click **Tools**, **Options**, **Fields…** (**Alt+t**, **o**, **f**).

2. Select the preferred option:

   - Select **Yes** if you want field values and functionality to be retained when pasted.

   - Select **No** if fields should be converted to plain text when pasted.

Combining Two (or More) Files with Different Field Values

Each field in an Edit file can only have one value. Whenever you have two files that you want to combine into a single file via Merge, Append or Include, all files must have the same values for each field. If they do not, you will be prompted to choose the preferred value.

There are several ways to handle combining two files which have different field values. You can bring the field values when combining the two files and be prompted to choose which value you want to keep; you can elect not to bring the field values and have the merged/appended/included portion automatically use the values of the destination file, you can convert all of the fields in one of the files to text before combining the two files, or you can convert selected fields to text.

⇨ **Bring the Field Values During Merge/Append/Include and Be Prompted to Choose the Preferred Value**

1. In Edit, open the file to which you plan to merge, append or include the other file.

2. Select the preferred command (Merge, Append or Include).

3. Select the **Bring Fields** option.

4. Select the file that you want to merge, append or include, and click **Open** (**Enter**).

⇨ **Do Not Bring the Field Values During Merge/Append/Include**

1. In Edit, open the file to which you plan to merge, append or include the other file.

2. Select the preferred command (Merge, Append or Include).

3. Make sure the **Bring Fields** option is ___not___ selected.

4. Select the file that you want to merge, append or include, and click **Open** (**Enter**).

⇨ **Convert All Fields to Text Before Merge/Append/Include**

1. Double click to open the file you plan to Merge, Append or Include to another file.

2. Click **Tools**, **Convert All Fields to Text** (*Alt+t*, *v*).

3. The *Select a New Name for the Job* dialog appears.

   a. The default name for the text file where fields have been converted to text will be *NoFields_OriginalJobName.SGNGL* (where *OriginalJobName* stands for the text file's original name). If you prefer a different name, type the preferred name.
   b. The default location for the text file where fields have been converted to text will be the same location as the original job. If you prefer a different location, click **Browse** and then select an alternate location.

4. Click **Save** (*Enter*).

   ✎ **NOTE**: The original file will remain open in Edit. You may wish to close and save that file.

5. Open the file to which you plan to merge, append or include the *NoFields_OriginalJobName* file.

6. If using Include, position the cursor where the other file will be included.

   ✎ **NOTE**: If using Merge or Append, the file will be merged or appended at the end of the current document.

7. Select the preferred command (Merge, Append or Include).

8. Select the **NoFields_*OriginalJobName*** file, and click **Open** (**Enter**).

   ✎ **NOTE***:* When using this method, it does not matter whether the *Bring Fields* option is selected.

⇨ **Convert Selected Fields to Text Before Merge/Append/Include**

1. With the cursor positioned in the file with the field values that should be converted to text, do <u>one</u> of the following:

   - **Right click** the field and select **Convert Selected Fields to Text.**

   - With the cursor positioned on the field, or with the field selected, click **Tools**, **Convert Selected Fields to Text**.

2. Select <u>one</u> of the following options:

   - **Selection only**

     Converts the currently selected field(s) within the marked segment.

   - **This Page**

     Converts all occurrences of the selected field(s) in the same section as the cursor is positioned.

   - **This Section**

     Converts all occurrences of the selected field(s) in the same section as the cursor is positioned.

   - **This Document**

     Converts all occurrences of the selected field(s) in the entire document.

   ✍ **NOTE:** If the field you select to convert is a Field List Group field, you will be prompted: *"Do you want to clear the currently selected field groups?"*

   ✓ If you select **Yes**, the selected fields will be converted to text and the field group will be cleared. For example, if you select to convert the appearance fields to text in one section so that you can change the values for those same fields in the next section, you might want to clear the values from the currently selected field group so that you can scan forward to the empty field and be prompted to fill it in, vs. having it automatically fill in with a stored value.

   ✓ If you select No, the selected field group will retain the current values.

Field Manager

The Field Manager feature allows you to view all the user defined fields for the current user in one list, to insert new fields, to set a default scope value for new fields, modify existing fields, and to export or import fields to and from other users.

⇨ **To Open Field Manager:**

1. In Manage Jobs, highlight the job, job history or case history for which you want to view the user defined fields.

2. Click **File**, **Field Manager…** (**Alt+f**, **f**).

⇨ **Tips for Managing Fields:**

- **Insert New Fields**

  To create a new user defined field, do <u>one</u> of the following:

  ✓ Click **Edit**, **Insert Field Name** (**Alt+e**, **n**).

  ✓ Press **Ctrl+i**.

  ✓ Click the Insert button on the Dictionary/List toolbar.

- **Modify Existing Fields**

  ✓ To modify the name of an existing field, select the field and then do <u>one</u> of the following:

    ▪ **Double click** the field.

    ▪ **Right click** and select **Modify**.

    ▪ Press **Ctrl+m.**

    ▪ Click the Modify button on the Dictionary/List toolbar.

  ✓ To add a value for the field:

    ▪ Select the field.

    ▪ Do one of the following:

      o **Right click** and select **Insert Field Value**

      o Click **Edit**, **Insert Field Value** (**Alt+e**, **v**).

    ▪ Type the value for the field.

    ▪ Click **OK** (**Enter**).

- ✓ To change the scope for a field:

    - ▪ Select the field.

    - ▪ Click **Edit**, **Set Scope** (**Alt+e**, **s**).

    - ▪ Select **User**, **Case** or **Job**.

    - ▪ Click **OK** (**Enter**).

- • **Set Default Scope for new user defined fields:**

    1. Click **Edit**, **Set Default Scope** (**Alt+e**, **d**).

    2. Select **User**, **Case** or **Job**.

    3. Click **OK** (**Enter**).

- • **How to share fields and field values with other users:**

    The Export Fields and Import Fields commands in the Field Manager File menu enable you to combine one job or case history's list of user defined fields and field values with another.

    - ✓ Export Fields

        1. Select the source job or case history file – the file from which you want to export User defined fields and field values.

        2. Select (highlight) the fields you want to export.

        3. Click **File**, Export Fields (**Alt+f**, **e**).

        4. Browse to a convenient location (e.g. Desktop, My Documents folder, flash drive).

        5. Type a name for the exported fields.

        6. Click **Save** (**Enter**).

        - ✎ **NOTE**: Do not select the name of a file with existing field information. If you do, you will be prompted with a warning message: "File exists, any existing field information will be lost. Do you want to export to this file?"

    - ✓ Import Fields

        1. Select the destination job or case history file – the file into which you want to import User Defined fields and field values.

        2. Click **File, Import Fields** (**Alt+f**, **i**).

3. Browse to the location of the job or case history file containing the exported fields and field values that you want to import.

4. Do <u>one</u> of the following:

   - Double click the file.

   - Select the file and then click **Open** (**Enter**).

? **NOTE**: If any field names already exist in the destination file that match the source file, CATalyst will automatically overwrite (not duplicate) the existing name. If there are new field names and values, CATalyst will add those entries.