What is RealTeam™

RealTeam is a simultaneous editing feature. It enables sharing of text and audio in real time. All the RealTeam participants have access to the text and audio. For example, a reporter can be writing and translating in realtime while one or more scopists edit and/or proof-reader(s) proof the same file; or, outside of realtime, two or more scopists (or scopist and proof-reader) can work simultaneously on the same file.

This feature can significantly speed up the process of transcript production by enabling one or more scopists/proof-readers to edit the same file during realtime or enable multiple parties to edit and proof a file.

- **Prerequisites**

  ✓ All members of the team must be using Case CATalyst Version 20.

  ✓ All members of the team must have a RealTeam (or Cloud Backup) login.

  ✓ Contact information for participants that will connect to a RealTeam session.

  ✓ Internet connection with or without a local network.

  - **TIP**: RealTeam can be used simultaneously with Output to CaseViewNet. A reporter can use the same Internet connection for output to CaseViewNet Browser as well as host a RealTeam connection.

  ✓ EDGE for Case CATalyst Support plan.

- **How it Works**

  A RealTeam session is made up of one ***host*** and one or more ***participants***. The person who invites one or more people to edit his/her file is the *host*. The person/people who receive the invitation to edit the file is/are the *participant(s)*. Most commonly, a reporter will be the host, and a scopist or proof-reader is the participant.

  Each RealTeam user, both hosts and participants will need a RealTeam login. You can either create a RealTeam login or use an existing Cloud Backup login.

  ✓ To create a RealTeam login:

  1. Anywhere in CATalyst, click **File**, **RealTeam Ready** (or click the RealTeam Status icon in Manage Jobs).

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

     - If you have an existing Cloud Backup account, it will be suggested as the RealTeam log in. To use the suggested login email and password, click the **Login** button, and then click **Finish** (or press **Enter**). Then, go to step **2**.

     - To create a new account, click the **Create New Account Now** button and go to step **1-c**.

  3. The process for creating a RealTeam Account is nearly identical to the process for creating a Cloud Backup login. The *RealTeam New Account* dialog box opens:

     - At *E-mail:* type the preferred email address.

- At *Password:* type a password (containing at least 8 characters that include at least 1 letter and 1 digit).

- At *Confirm:* type the same password. Then, click **Next** (or press **Enter**).

- The *Answer Security Questions* dialog box displays. Select preferred questions for Questions 1, 2 and 3 and type preferred answers. If you ever forget your password or desire to change it, you may be prompted for the answers to the questions you selected.

  When finished, click **Next** (or press **Enter**).

4. At the *Success* dialog, click **Finish** (or press **Enter**).

5. At the *RealTeam – Account* dialog box, click **Login** and then click **Finish** (or press **Enter**).

✍ **NOTE**: In the future, if you want to use a different email address, you can re-access this dialog box by logging out of your current RealTeam account to access this dialog. If you want to change the password for your RealTeam account, click the **Change Password** button in this dialog box.

RealTeam Invite

The host should gather the contact information (email addresses used for RealTeam accounts) from the scopists and/or proof-readers that will be invited to participate when using RealTeam, and then create their list of contacts in the *RealTeam Invite* dialog box.

1. Do <u>*one*</u> of the following:

   - Open **Translate,** name a file, select the *RealTeam Invite* option, and then click **OK** (or press **Enter**) to start a realtime file.

   - Open any existing file in Edit and then click **File**, **RealTeam Invite**, or click the *RealTeam Invite* toolbar button.

2. The *RealTeam Invite: Filename* dialog box displays. For each of the scopists or proof-readers with whom you plan to work using RealTeam, do the following:

   a. At *E-mail*, type the email address (e.g. *ritascoper@gmail.com*) of the participant's RealTeam account, then press **Tab** to move to the next field.

   b. At *Name*, type the contact's name as you wish it to display at the cursor location where they are editing in the shared file (e.g. *Rita*). Then, click the down arrow to select a color for the background of the contact's name. Then press **Tab** to move to the next field.

   ✍ **NOTE**: If you do not enter a name, the name/characters up to the @ in the E-mail field will be used as the name for the cursor location (e.g. *ritascoper*).

   c. At *Add to My Dict.*, indicate whether the defines made by that contact go to the appropriate dictionary and global table on the reporter's computer as well as the dictionary and global table on their own system. This option is selected by default. If you deselect the option, defines made by the contact will go to the reporter's global table, but not to the reporter's dictionary. The status of this option is remembered as part of the contact's information.

✍ **NOTE**: All defines go to all connected users' global tables, regardless of the status of this option. Defines made by the reporter (or the party doing the inviting) are not sent to the contact's dictionaries, regardless of the status of this option.

✍ **NOTE**: All defines that go to the reporter's dictionary are flagged as "From Real Team" and can be filtered in the dictionary for review.

d. When finished, you may press **Tab** twice, to move to the *Notes* field.

e. *OPTIONAL*: At *Notes*, type any additional information you may want to have handy for this contact (e.g. phone number).

f. When finished, click **New** (or press **Alt+n**) to add the next contact, and then repeat steps a-e for each additional contact.

g. When finished adding all contacts, click **Close** (or press **Alt+c**).

✍ **NOTE**: There are three columns where you will not fill in information at this time:

- ✓ **Invite** – You will check this box when you are ready to invite specific contacts for a RealTeam session.
- ✓ **Status** – When you are actively working in a RealTeam session, this column will display the contact's current status:
  - **Offline** – contact is not RealTeam ready/not logged in to RealTeam. You can still invite this contact; as soon as they log in, they will receive the invite.
  - **Available** – the contact is online and logged into RealTeam, waiting to be invited.
  - **Connected** – the contact is logged in and connected to the current RealTeam session. If you want to rescind your invitation to the contact or disconnect them from the RealTeam session, you can click the check box in the Invite column of an invited user and. You will be prompted "*Do you want to disconnect from this user?*" Click **Yes** to disconnect; **No** to remain connected.
  - **Declined** – the contact received your invitation but selected Decline instead of Accept. If you want to try and invite the contact again, simply click the check box in the Invite column again.
  - **Unknown** – RealTeam cannot determine the status of the contact.
    - ✓ **Invited** – Displays *Invited* when the contact has been invited. Even if the contact declines the invitation, the status will remain *Invited*.

2. Set up a time to test the connection with your contacts.

   Stenograph encourages you test RealTeam prior to using RealTeam in a job. Coordinate with each of your team members to set up and test a realtime session.

   a. The reporter that will be hosting the realtime session should open **Translate**, type a file name and, in addition to selecting any other options for the realtime translation, click the check box for the ***RealTeam Invite*** option. Selecting this option automatically logs you into RealTeam.

✍ **NOTE**: If you wish to test the process of sharing a file for editing outside of realtime translation, the editor taking the host role should open the file to be edited and then click **File**, **RealTeam Invite**.

b. Do _one_ of the following:

- Click the check box in the *Invite* column for the contact you want to invite, and then click the **Invite** button (or press **Alt+i**).
- Select (highlight) the contact you want to invite and press the **Spacebar**.

  Repeat as necessary for each contact who is testing the connection with you.

c. Start writing realtime. If the *Connected Users* pane is not displayed, click **View**, **Panes**, **Connected Users** (or press **Alt+v**, **e**, **u**). You can see the status of your contacts in the Connected Users pane. (For more information about the Connected Users pane, see page 10.)

d. The participants, the scopist(s) and/or proof-readers that you have contacted with invitations should be advised to log in to RealTeam by doing _one_ of the following:

- Click **File**, **RealTeam Ready** and then **Finish** when logged in.
- Click the *RealTeam Ready* toolbar button, and then **Finish** when logged in.

Once logged in, the invitation will be sent. When the invitation is received, the participant will hear a "ring" (like a telephone) and the CATalyst icon flashes on the Windows Taskbar. The *RealTeam* dialog box displays whom the invitation is from (via email address), and the path and filename where the transcript will be opened. There are two options to respond to the invitation: *Accept* or *Decline*. Direct your contact(s) to click **Accept** to receive the file.

✍ **NOTE**: A scopist or proof-reader would click *Decline* to let a reporter know that, although logged in, they are not available to participate in the RealTeam session.

e. The participant(s) will receive the file immediately as the reporter writes in realtime (or edits). Each member of the team should test audio playback as well as their ability to edit. You may see the scopist/reporter cursor, marks, changes, as he/she/they edit. When finished, save and close the file as usual.

✍ **NOTE**: During a RealTeam session, the scopist's name will display on the reporter's realtime screen to indicate the scopist's cursor location. The reporter's name will display on the scopist's computer screen to indicate the reporter's cursor location in the realtime file.

If a scopist is editing above the current text on the screen, their cursor (name) displays in the upper left-hand corner of your realtime screen. If their cursor is below the current text on the screen, their cursor displays in the lower left-hand corner of the realtime screen. If their cursor is positioned on the screen where your cursor is, you should see their cursor (name) unless it gets too close to your cursor position, in which case it may momentarily hide. Once one of the cursors moves away from the same position, both cursors will be seen on the same screen.

✍ **NOTE**: If a scopist or proof-reader is editing right up against the reporter's cursor, the audio may not be available yet because it hasn't been received. If they wait a few seconds, the audio will be available.

RealTeam Ready

- **Each Time you use RealTeam**

✓ Realtime Translation with RealTeam

1. Reporter opens CATalyst, starts a realtime job and selects the *RealTeam Invite* check box. (If the reporter forgets to select that option, the reporter can click **File**, **RealTeam Invite** or click the **RealTeam Invite** button on the RealTeam toolbar.) The Reporter selects and invites one or more contacts to work on the team with him and then starts writing.

2. Each scopist(s)/proofer(s) open CATalyst, select **RealTeam Ready** and receive invitations. He/she/they click **Accept** and receive the text and audio. They begin editing/proofing as determined prior to the beginning of the job.

   TIP: One of the options when you log in is *Auto Login to RealTeam at CATalyst startup*. If the scopist/proofer will always use RealTeam when working, he/she/they can select this option, and skip having to click **RealTeam Ready** each time they open CATalyst.

   ✍ **IMPORTANT NOTE**: If there is more than one scopist/proofer working on the same job, it will likely be determined by the editing team's leader prior to the start of the job as to who is responsible for editing which portions of the job, whether those portions are split up by page numbers or units of time; with scopists leaving hidden text comments or visible notes such as ^ RITA STOPS HERE for each other at stopping or starting points to avoid gaps or unwanted areas of dual coverage.

✓ Edit with RealTeam (without Realtime Translation)

1. Host opens the file in Edit, selects **RealTeam Invite,** issues invitations to anyone else who will be working on the file via RealTeam.

2. Participant selects **RealTeam Ready** and clicks **Finish**. When invitation is received, participant clicks **Accept,** receives the file and can begin editing.

- **Ending a RealTeam Session**

When finished, each team member will save and close their files.

✍ **NOTE**: When the reporter saves and closes the realtime job, all RealTeam participants are notified in the lower right-hand notification area.

For example, let's say Donna invited Richard and Rita to edit and proof her file while writing realtime. At the end of the session, Richard and Rita will receive the following notification, displayed momentarily:

donna@gmail.com has closed their RealTeam file.
Future changes will not be synched.

Both Rita and Richard keep their copies of the file with all the changes made up to that point.

However, because they are no longer connected to each other via RealTeam, their files are no longer being updated with contributions from each other. If Rita and Richard wanted to continue to work in synch, they can. One of them would need to become the host and invite the other to a new RealTeam session.

Additional Things to Know About RealTeam

- **RealTeam File Structure**

  The RealTeam session retains the file structure and naming conventions from the host, beginning at the case level.

  For example, let's say a reporter named Joseph expects to take several depositions concerning an industrial accident at the Watertown factory. Joseph opens CATalyst, goes into his Joe user and creates a case called IA_Watertown. He opens translate and starts his realtime job in that case. He names the job JSMITH-12-20-2018, and then invites his scopist, Sheila, to the RealTeam session.

  Sheila, knowing that she will be working with her reporter-client Joseph, goes into the user she has created for him on her system, Joe_B, and accepts the invitation. A case named IA_Watertown is created on Sheila's system in the Joe_B user.

  Therefore, on Joseph's computer *C:\CAT4\usr\Joseph\IA_Watertown* is the location of the text and all subfiles. On Sheila's computer, *C:\CAT4\usr\Joe_B\IA_Watertown* is the location for the text, globals and audio on Sheila's computer.

  ✍ **NOTE**: If Sheila ends/disconnects early, the files are saved only to the point where she closed the file.

- **What Is Shared**

  Format symbols such as <Hidden Text> and <Oops – *n*> **<u>are</u>** shared within the transcript. They will show up in all connected users' hidden text and/or hotspots panes.

- **What Is NOT Shared**

  ✓ The view is based on each user's individual user settings. Changing the view, colors or other items stored in UserSettings is not shared. These changes do not affect the view of any other user.

  ✓ The Track Changes feature is not supported with RealTeam. This has been requested for a future update.

  ✓ Wordlists/spellcheck information are not shared at present – this has been requested for a future update.

  ✓ The Job History file, which contains information such as Timers and job-scope Cat Scratch information. This has been requested for a future update.

- **RealTeam Toolbar**

  A RealTeam toolbar with the RealTeam Status icon ( ) is automatically added to your Manage Jobs toolbars. A RealTeam toolbar with the RealTeam Status icon ( ) and RealTeam Invite icon ( ) is automatically added to your Translate and Edit toolbars.

  The RealTeam toolbar displays both icons in Translate and Edit because a file must be open for you to send a RealTeam Invite. The icons' function is to visually show the status of the RealTeam session in any function of CATalyst and to show your own RealTeam connection status (RealTeam Ready or not).

✓ RealTeam Status Icon

The RealTeam Status icon displays different colors based on your status when you are or are not logged in to RealTeam or based on the RealTeam session connection status when in a RealTeam session.

 = Gray: RealTeam is offline. Click this icon to log in.

 = Blue: Logged in – RealTeam Ready!

 = Green: At least two people are successfully connected to the session.

✍ **NOTE**: The RealTeam Status icon will show yellow when a RealTeam participant is connecting.

✍ **NOTE**: If the RealTeam status icon is flashing red, it means there is a change in the connection and previously invited participants are not currently connected. A tooltip may tell you more information. Click the RealTeam Status icon to open or go to the Connected Users pane to get further details.

✓ RealTeam Invite icon

 = Invite RealTeam inactive; you need to start translation or open a file to invite other team members to join a RealTeam session.

 = Invite other RealTeam members to join (Active).

- **RealTeam Re-Connection**

If you have been invited to share a file and you close the file while the file is still active, and/or you are disconnected, you will receive the Invite again. You have the option to decline the second invitation.

- **Logging out of RealTeam**

There may be times where you have logged into RealTeam at the start of the day and then no longer want to be RealTeam Ready, but you are not shutting down; you are going to continue to work on your computer. In that situation, you can log out of RealTeam by clicking the RealTeam Status icon on the RealTeam toolbar or by clicking **File**, **RealTeam Ready**.

The *RealTeam - Account* dialog box displays. Click **Logout** button and then click **Cancel** to no longer be RealTeam Ready. Your status will be listed as "Offline" in any RealTeam Invite dialog box that contains your contact information.

✍ **NOTE**: If you log out of RealTeam while you are currently active in a RealTeam session, but do not close the file, you are not disconnected from RealTeam. If you are listed in other RealTeam users' contact list(s), your status will display as available. If you wish to disconnect, close the file.

Connected Users Pane

The *CaseViewNet Connected Users* pane has been renamed to **Connected Users**. It has been modified to include a *CaseViewNet Connected Users* section and a *RealTeam Connected Users* section. It is one pane (similar to the Text and Steno/Text sections in the Cat Scratch pane) where the top part is reserved for CaseViewNet users that are receiving the realtime feed via the Cloud or network. The lower part of the pane is reserved for RealTeam connected users.

Adding both sets of connected users to a single pane will make it easy and intuitive for reporters to find connection information for both CaseViewNet clients and RealTeam participants.

- **Step-by-step instructions**

  The *RealTeam Connected Users* pane is available by clicking **View**, **Panes**, **Connected Users** (or by pressing **Alt+v**, **e**, **u**). If you are the host, the pane shows the contact information for all the participants that have been invited. If you are the participant, you will only see the status for the host.

  For example, let's say you are the reporter writing realtime and you invited your scopist and a proofreader. Your *Connected Users* pane will show both of the contacts along with their status. Let's say the scopist accepted your invitation, so the scopist's status shows *Connected*. Let's say the proofreader is going to wait 30 minutes before connecting so the proofreader's status is *Offline*. Once the proofreader logs in and accepts your invite, the status displays *Connected*.

  If you are the scopist and/or proofreader in this example, you will only see the status for person that invited you. In other words, the scopist will not see the status of the proofreader and the proofreader will not see the status of the scopist.

  The *Connected Users* pane contains the following informational columns:

  ✓ **Status** – displays the status of the contact:

  - **Connected** – the connection has been established. The reporter (or person who sent the invitation) can right click the contact's Status field and select **Disconnect** to disconnect the contact from Real Team, or **Modify** to modify the contact's name and cursor/ highlight color.

  - **Declined** – the contact declined the invitation. The reporter can right click the status field and select **Reconnect** to re-send an invite. If the contact declined by mistake, this gives them another opportunity to select *Accept* and connect.

  - **Available** – The contact is online and logged into RealTeam waiting to be invited. Availability is per document/transcript.

  - **Failed** – Indicates that something went wrong with the connection. RealTeam will continue to attempt to connect. If it doesn't reconnect on its own, you can right click and manually select **Reconnect**. If the failed status continues to display, you should contact support for assistance.

  ✓ **Name** – displays the contact's name. If you right click the contact's Name field, you can modify the Name and/or change the cursor/highlight color associated with the contact. Changing the cursor/highlight color only affects the display on *your* computer.

  ✓ **E-mail** – displays the contact's e-mail address. This can be modified in the *RealTeam Invite* dialog box.

  ✓ **Notes** – displays any notes that were entered into the contact's information in the *RealTeam Invite* dialog box.

✓ **Conn Type –** displays the type of connection, which is either ***Direct*** (communicating directly) or ***Relay*** (communicating via one of Stenograph's servers).

Opus Audio Codecs

The Opus 13kbps 6MB/hr and Opus 32kbps 15MB/hr audio codecs are available for AudioSync.

The Opus codecs provide a high-quality audio recording with significantly smaller audio file sizes. Opus is a great choice for your everyday AudioSync recording and Stenograph highly recommends using an Opus codec when using RealTeam.

The quality of the Opus 13kbps 6MB/hr codec is comparable to the PCM 22050 Hz – 159 MB/hr codec. The quality of the Opus 32 kbps 15 MB/Hr codec is comparable to the PCM 48000 Hz – 346 MB/hr codec.

✍ **NOTE**: Version 20 is required to play AudioSync files recorded with the Opus codec in CATalyst.

- ✓ If a reporter is working with a scopist who has not updated to Version 20, the reporter should use one of the .WAV codecs, not the Opus codec.

- ✓ If a reporter or scopist is required to edit a file on a system that cannot be updated to Version 20, that has an audio file that was recorded in Version 20 with the Opus codec, it is recommended that they download the OpusToWav Conversion program available at https://www.stenograph.com/cc-downloads. The WAV file will not automatically synchronize to the CATalyst transcript.

- ✓ There are external players for Opus codec audio files. Stenograph does not recommend any one particular external player for these files.

- **Step-by-step instructions**

To select a different audio codec:

1. If you are starting a realtime job, open the **Translate** dialog box. If you plan to translate later, do <u>*one*</u> of the following:

   - ✓ Click **Tools**, **All Options** (or press **Alt+t**, **End**), or click the All Options button on the toolbar. Click **Translate**, and then click **Realtime**.

   - ✓ Click **Tools**, **Options**, **Translate** (or press **Alt+t**, **o**, **t**). Click **Options** (or press **Alt+p**) and then click the **Realtime** tab.

2. In the *Audio* section, click the down arrow at the end of *Codec* and select the preferred codec.

✍ **NOTE**: The * symbol next to the name of the ***Opus 32 kbps 15 MB/Hr*** codec indicates that it is the choice recommended by Stenograph.

Post-RealTeam Dictionary Management Options

As you read on page 4, when setting up contact information in the RealTeam Invite dialog pane, the reporter decides whether to allow the defines made by contacts to go to their dictionaries via the *Add to My Dict.* column. If the reporter selects Yes and the defines made by the reporter's scopist(s) are added to their dictionary, the reporter will likely wish to review those entries.

All defines that go to the reporter's dictionary are flagged as *From RealTeam* and can be filtered in the dictionary for review.

- **Step-by-step instructions**

1. Open the dictionary you wish to review. This may be the personal dictionary, the Update Area, a case dictionary or job dictionary – wherever the entries were defined in Edit during a RealTeam session.

   ✍ **NOTE:** Different teams may have different preferences about where defines should go. Some may prefer scopists define to one job or case dictionary, regardless of whether the define should ultimately be categorized as a D-define vs. a K-define or J-define; others may prefer the scopist to D-define and K- and/or J-define as needed.

2. Select the Filter command using *one* of the following:

   ✓ Press **Ctrl+y**.

   ✓ Click **View**, **Filter** (or press **Alt+v**, **i**).

   ✓ Click on the *Dictionary/List* toolbar.

3. At *Filter On*, select **Entry Type**. Click the blank field (or the down arrow at the end of the blank field) and then select **From RealTeam** as the Entry Type.

4. Click **Filter** (or press **Enter**).

5. Review the entries for accuracy and modify if necessary.

   TIP: If any of the entries should be moved to a different dictionary, select the entry(ies), right click, select **Move to Dictionary**, and then select the dictionary to which the entry(ies) should be moved.