Quick Start Guide

For Reporters using CATalyst® version 21.5 or later, to prepare for the best experience when working with APEX Agencies

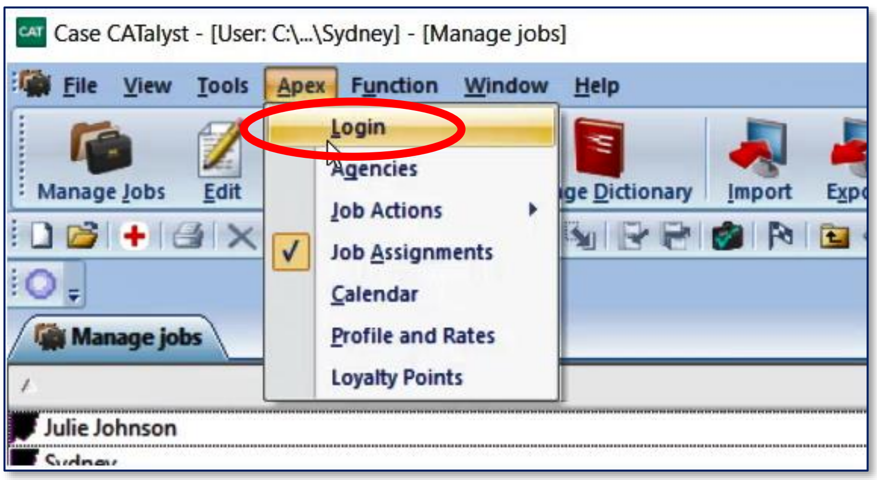
Let's Get Started

Complete the steps in this guide to connect with APEX and prepare for fully-integrated benefits when using CATalyst for APEX agency jobs. You must be using CATalyst version 21.5 or later.

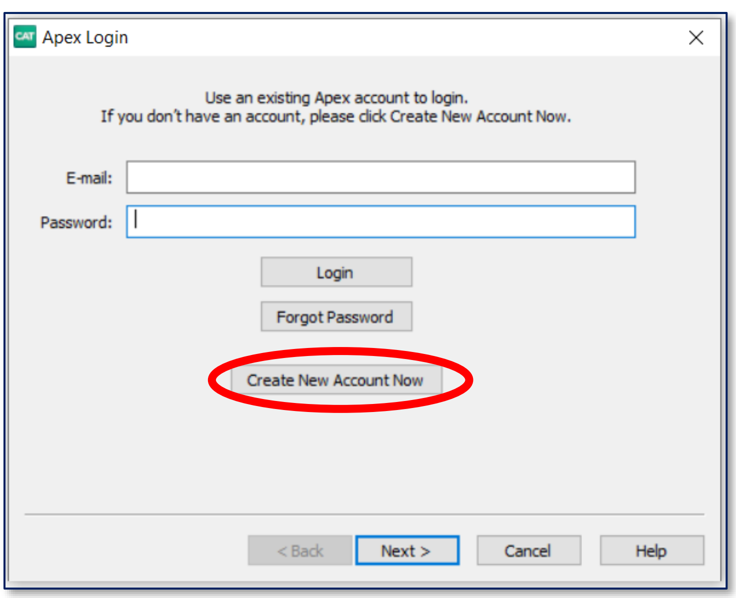
Register

If you already created an APEX account on the APEX website, skip this section and go to **Connect CATalyst to APEX** on page 4.

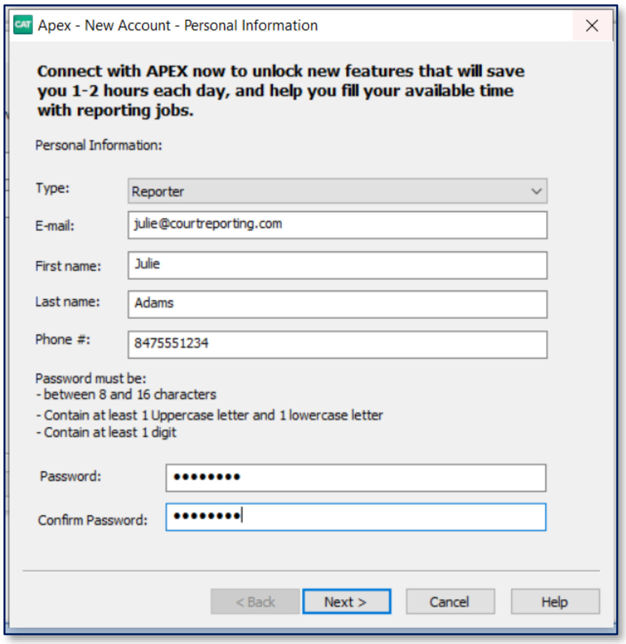
1. Select the **Login** from the Apex menu at the top of your CATalyst screen



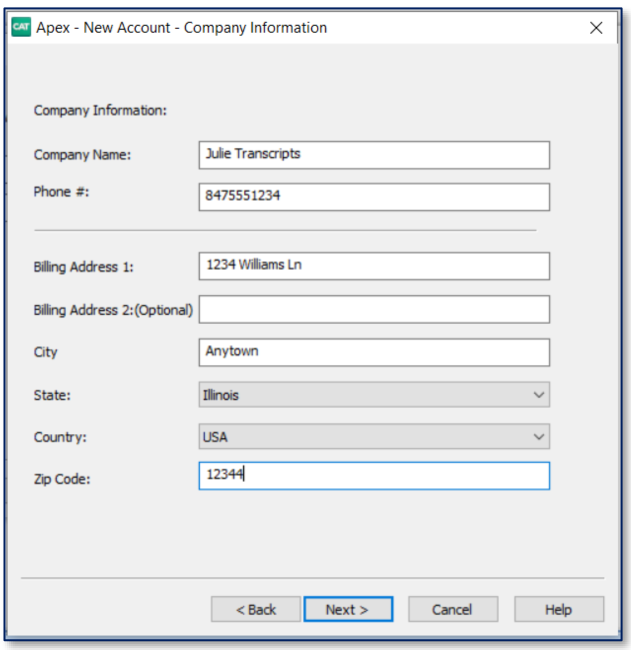
2. Select **Create New Account Now**



3. Fill in basic information about yourself and create a password.



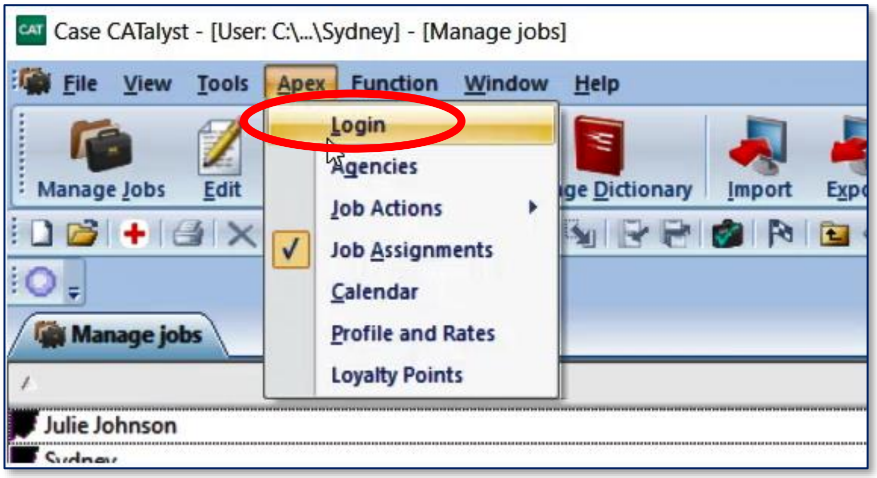
4. Fill in basic information about your company. When you click **Next**, your APEX setup will be complete, and you will be ready to log in.



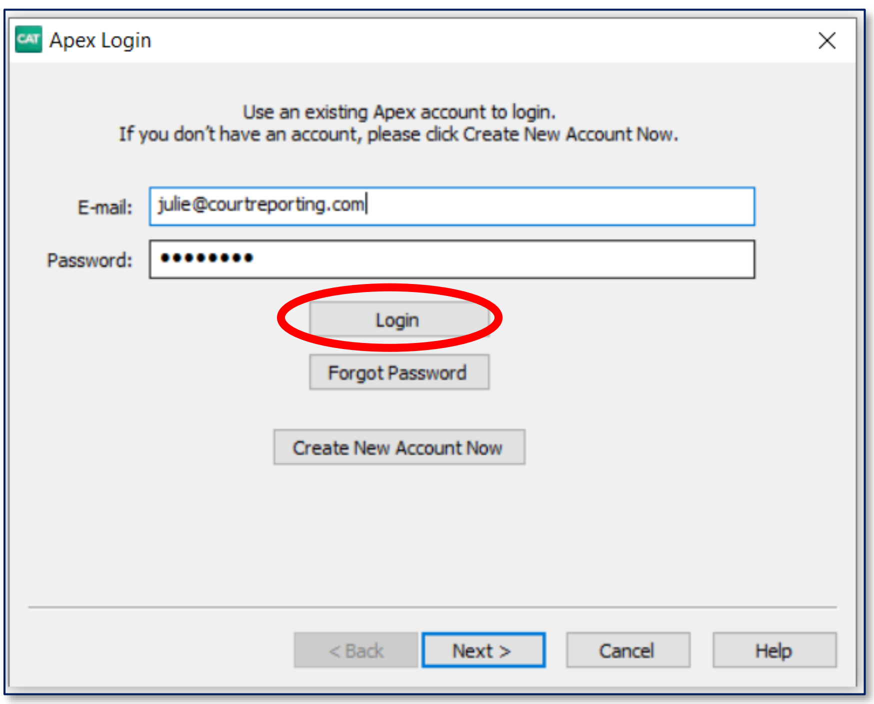
Connect CATalyst® to APEX

Once you've created your APEX login,

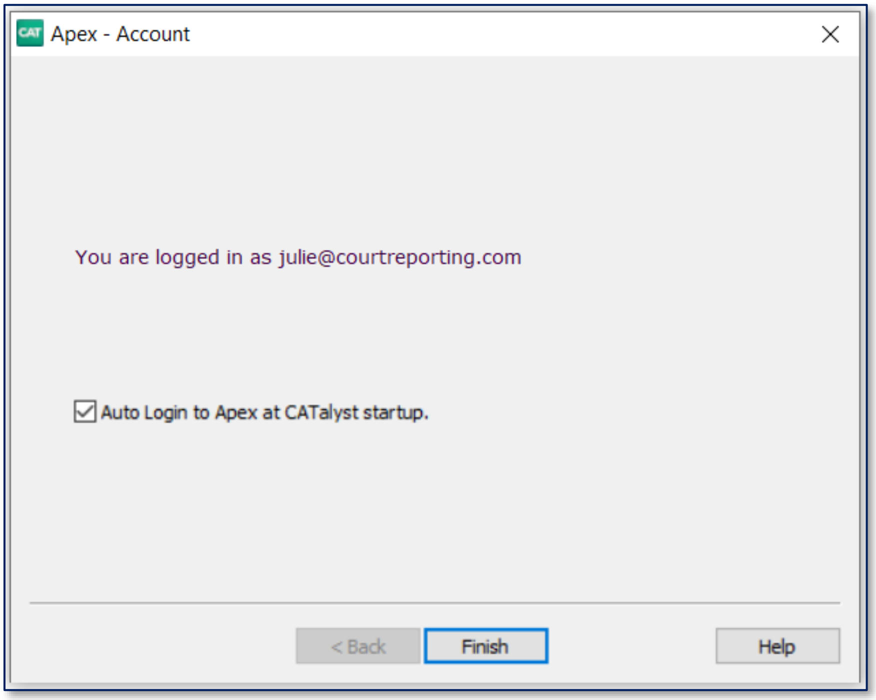
1. Select the **Login** from the Apex menu at the top of your CATalyst screen



2. Log in with your email address and password.



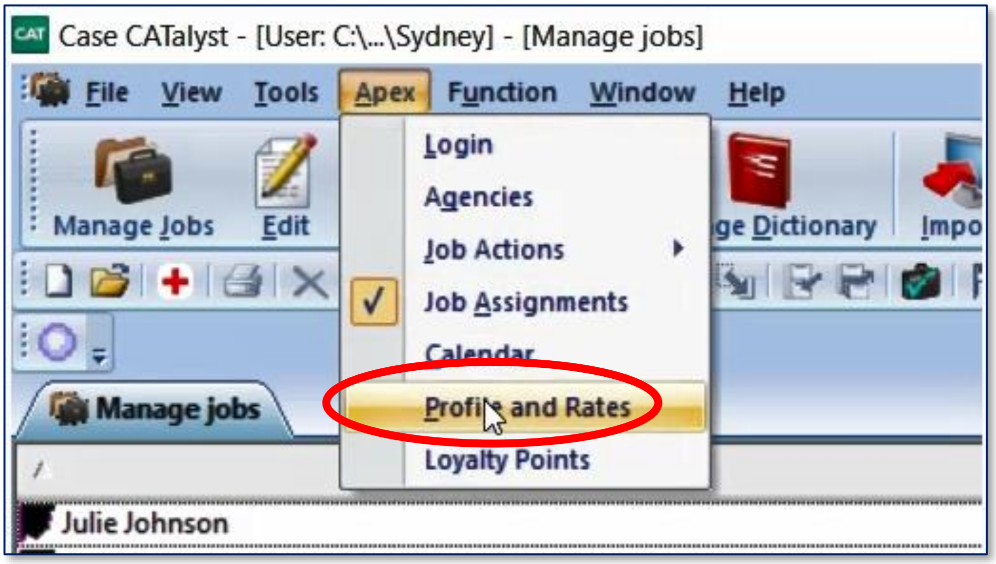
3. Once logged in, it is recommended that you check **Auto Login to Apex at CATalyst startup**, so you will stay connected to APEX whenever you are able to connect to the Internet. This will allow you to keep the lines of communication with agencies open, so you will receive job requests and updates will happen in real time.



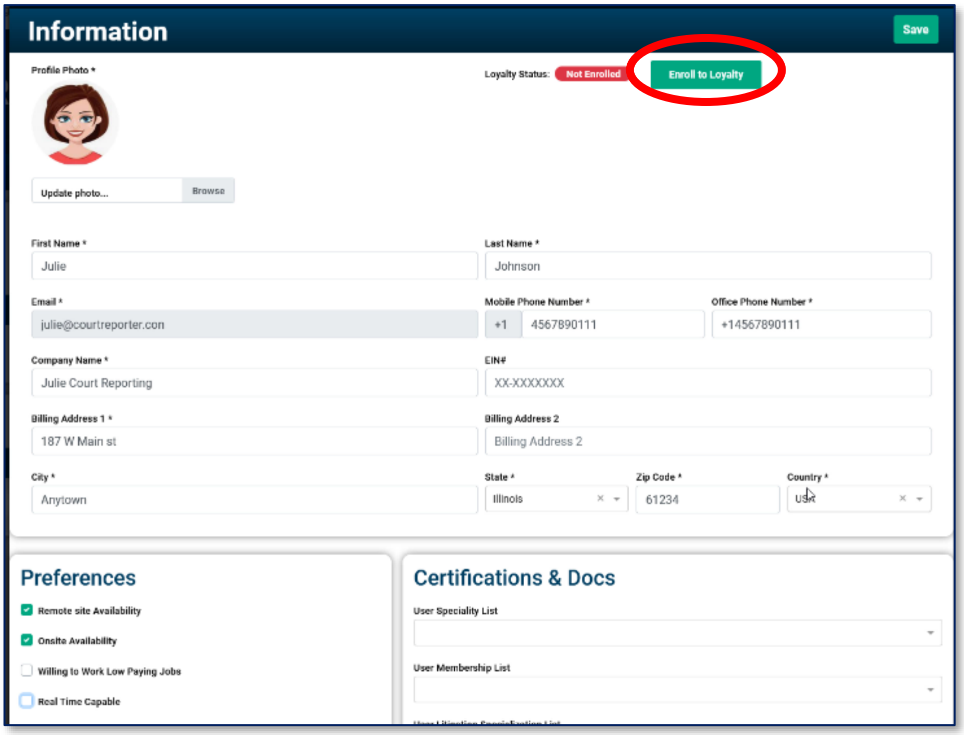
Set up your Profile

Setting up your profile in APEX will communicate your services and rates to agencies in the APEX Ecosystem. You will need Internet access to complete this step, because you will be maintaining this within the APEX web interface.

1. Select the **Profile and Rates** from the Apex menu at the top of your CATalyst screen



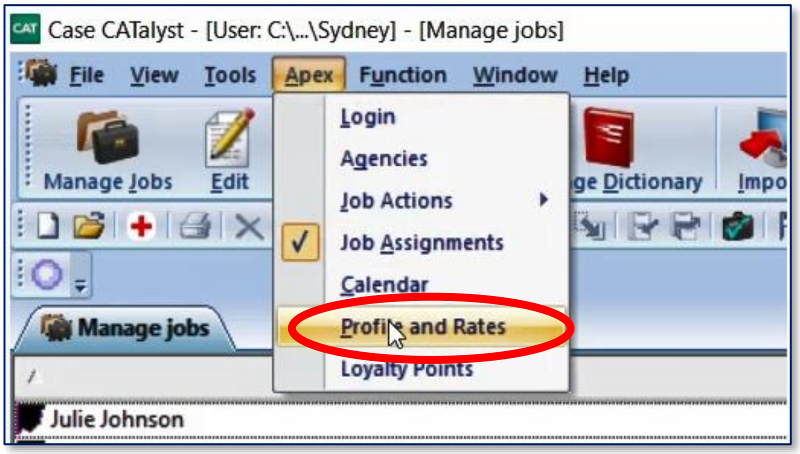
2. When you reach the Profile screen, upload your picture (so agencies can see your smiling face!), add preferences and certifications. ***Don't forget to enroll in Stenograph's Loyalty Program by clicking the green button!***


Information
Save
Profile Photo *
Loyalty Status: Not Enrolled
Enroll to Loyalty
Update photo...
Browse
First Name *
Julie
Last Name *
Johnson
Email *
julie@courtreporter.con
Mobile Phone Number *
+1 4567890111
Office Phone Number *
+14567890111
Company Name *
Julie Court Reporting
EIN#
XX-XXXXXXX
Billing Address 1 *
187 W Main st
Billing Address 2
Billing Address 2
City *
Anytown
State *
Illinois
Zip Code *
61234
Country *
Preferences
Remote site Availability
Onsite Availability
Willing to Work Low Paying Jobs
Real Time Capable
Certifications & Docs
User Speciality List
User Membership List

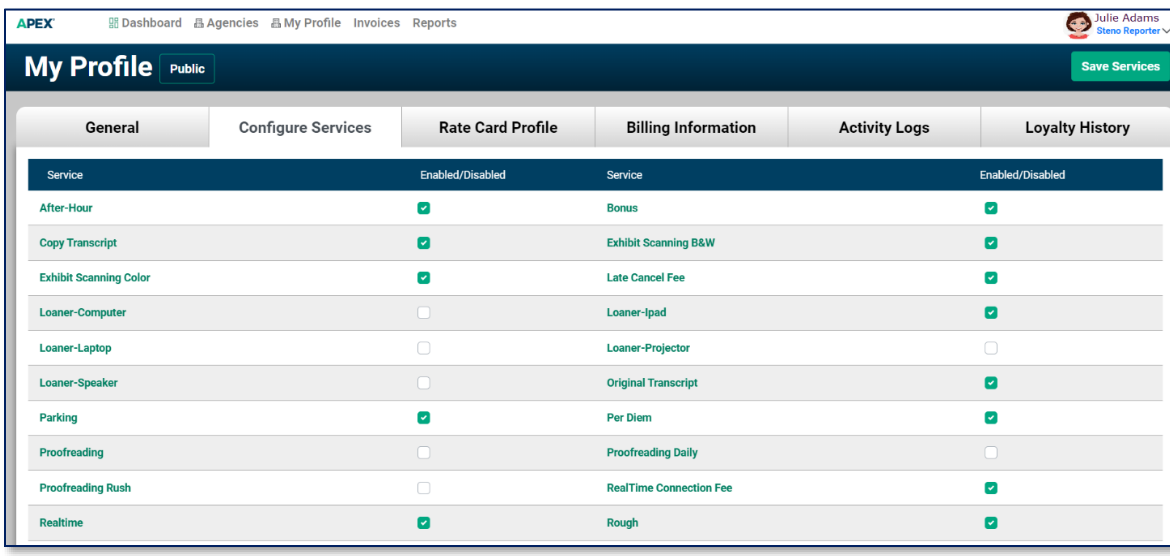
Set up your Services

Select the services that you offer to let agencies know your capabilities, and set up rate cards that will help you when you're ready to create an invoice for work completed. You will need Internet access to complete this step, because you will be maintaining this within the APEX web interface.

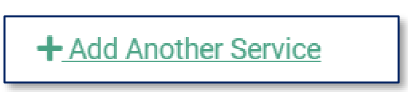
1. Select the **Profile and Rates** from the Apex menu at the top of your CATalyst screen



2. Access the **Configure Services** tab within your profile and select the services that you offer. You will use these later to create line items when you create an invoice.



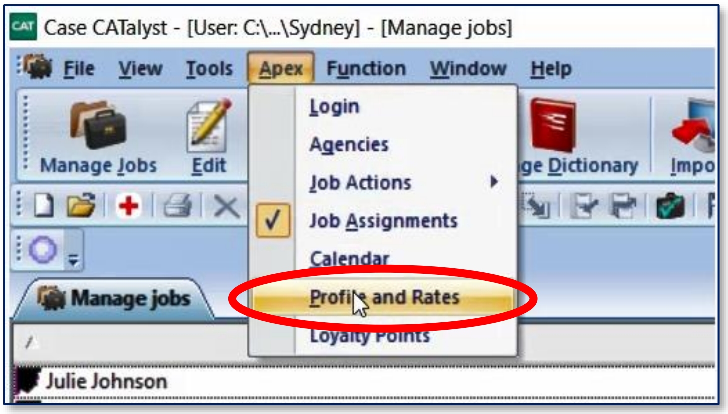
3. If you don't see a service on the list that you do offer/charge for, or would like the description you use on your invoices to read differently, you can customize. Select **Add Another Service** found at the bottom of the default list of services.



Set up your Rate Cards

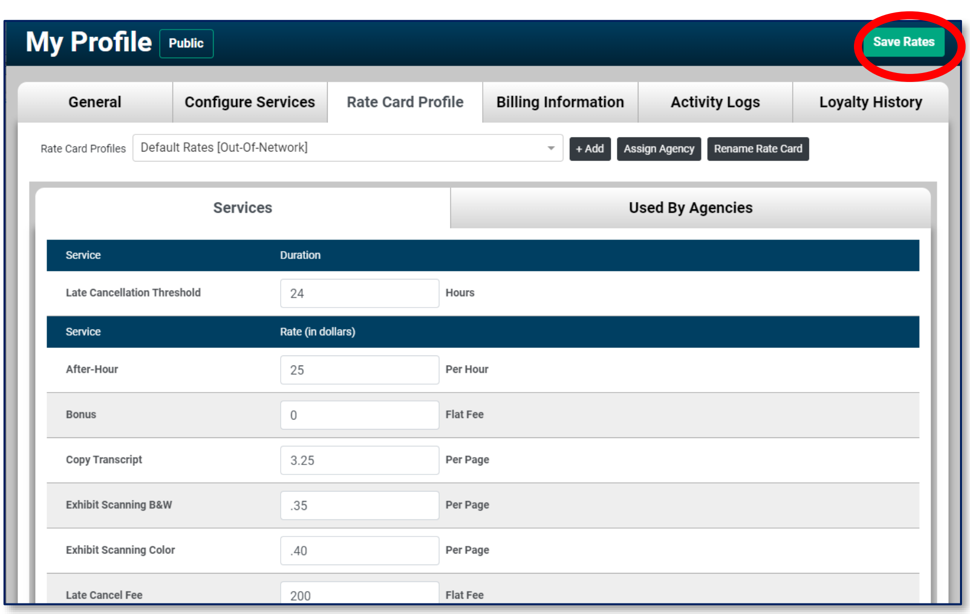
Set up your Default Rate Cards that will be visible to in-network and out-of-network agencies (see **Agency Relationships** on page 11). You can also create custom rate cards for specific agencies or situations. You will need Internet access to complete this step, because you will be maintaining this within the APEX web interface.

1. Select the **Profile and Rates** from the Apex menu at the top of your CATalyst screen



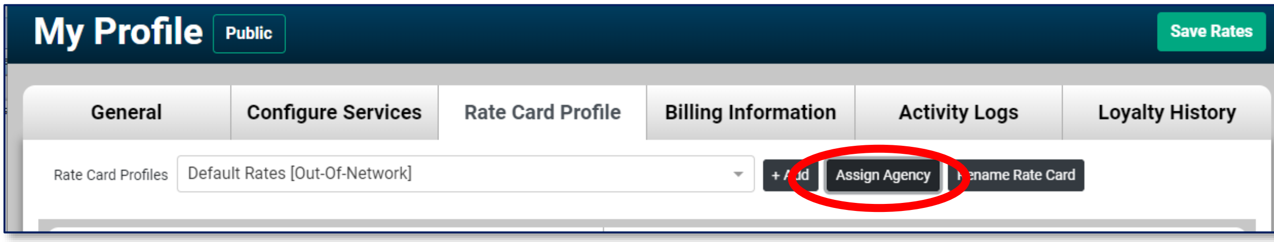
2. Access the **Rate Card Profile** tab within your profile. Create default rate cards for In-Network and Out-of-Network agencies. You can also create custom rate cards. Remember to hit the green **SAVE** button before creating a different rate card or leaving this screen.

   Note that services offered during the rate card setup are based on your selection of services that you offer on the **Configure Services** tab. If you think something is missing, add that service and then come back to this tab to set up your rates.

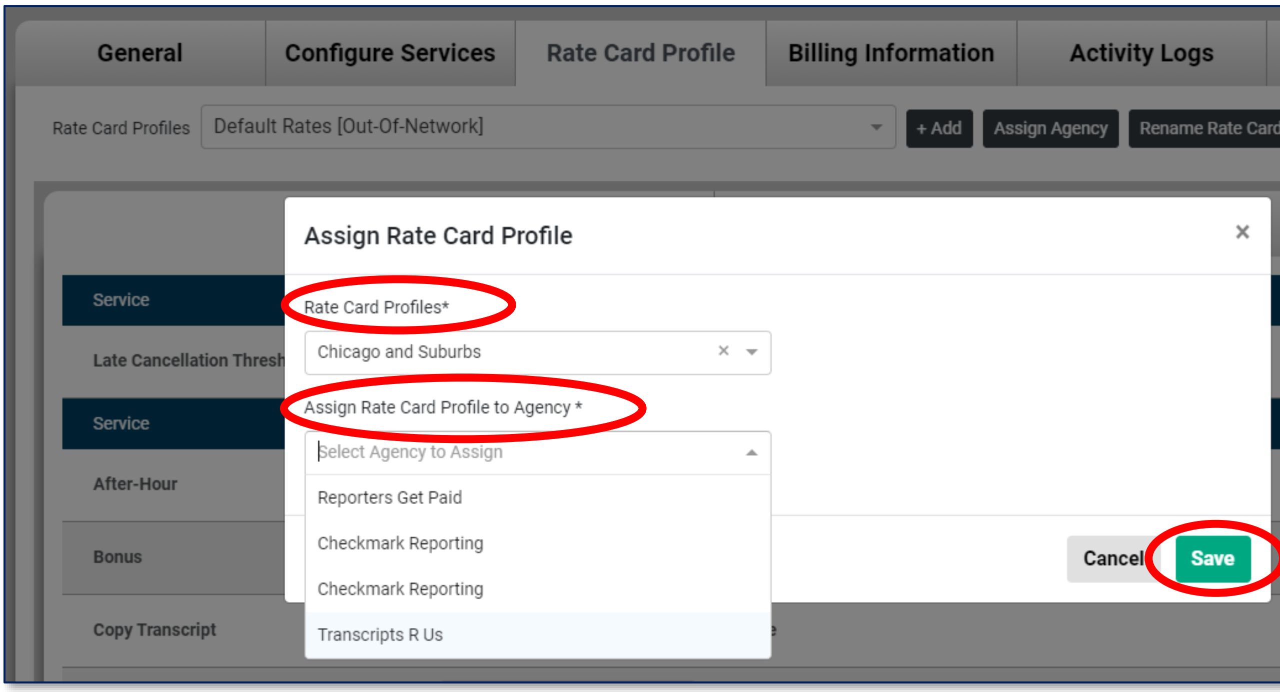


Rates used in this screenshot are not intended to represent accurate market rates.

3. If you've created any custom rate cards, you can assign them to agencies. Click the **Assign** Agency button on the **Rate Card Profile** tab



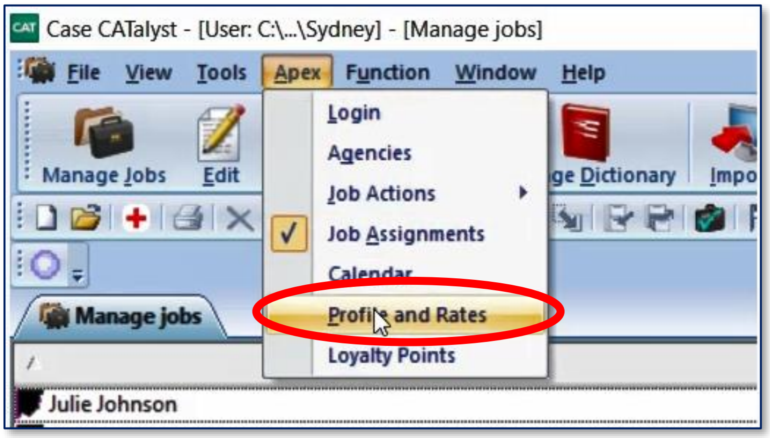
Then select the desired rate card from the **Rate Card Profiles** drop-down and the desired agency from the **Assign Rate Card Profle to Agency** drop-down. Click **Save**.



Set up your Billing Information

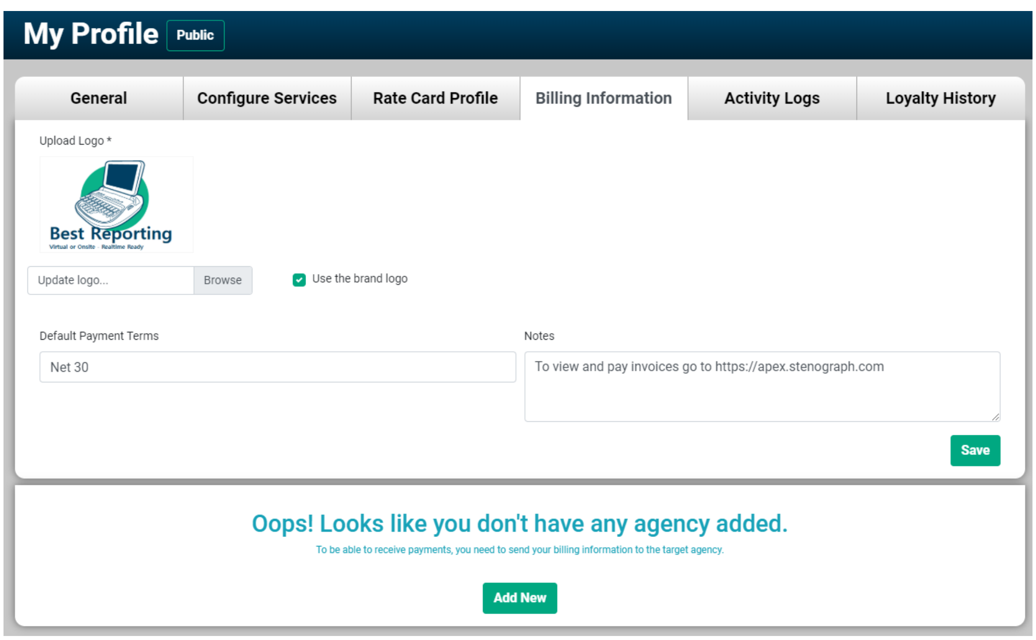
You will be able to send a professional-looking invoice directly from CATalyst for the jobs that you complete. This part of your profile sets the stage for content that will be common to all invoices that you create. You will need Internet access to complete this step, because you will be maintaining this within the APEX web interface.

1. Select the **Profile and Rates** from the Apex menu at the top of your CATalyst screen



2. Access the **Billing Information** tab within from your profile, and upload your logo, if you would like one to appear on your invoices. You can also enter your default payment terms and any notes that you would like to appear on invoices.

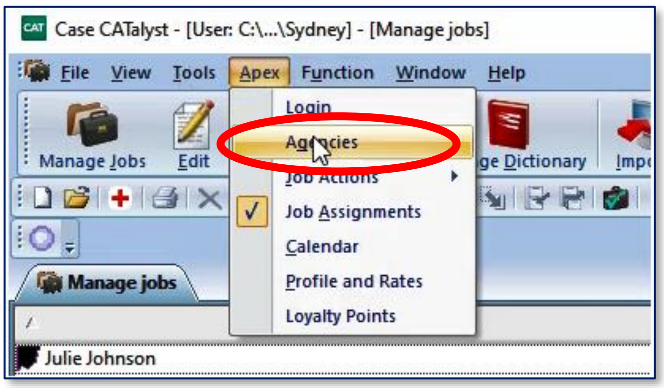
   When you connect with an agency using APEX, they will give you their “Secret Key” to connect for payments through third-party provider, Stripe®, You’ll do that at the bottom of the screen by clicking **Add New** and entering information requested.



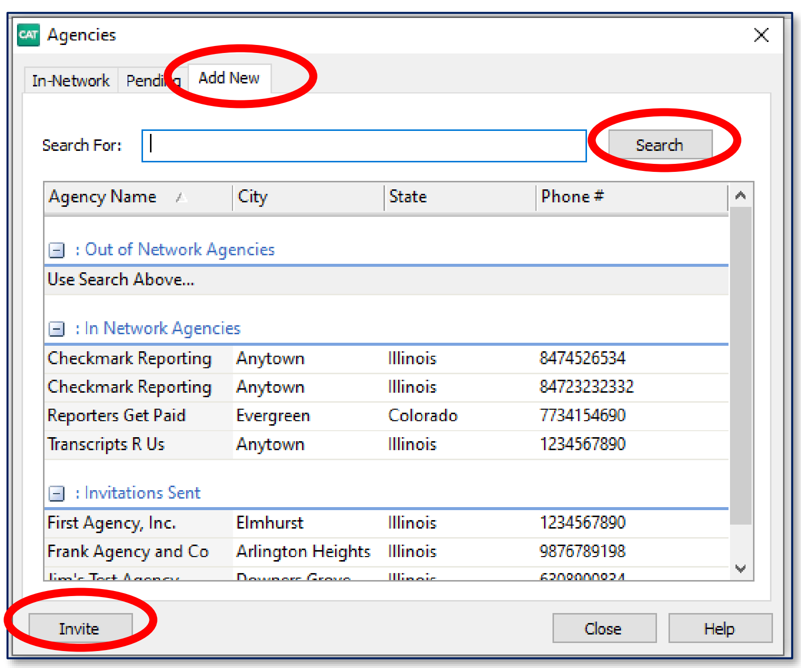
Agency Relationships

APEX allows you to connect with agencies you know and helps agencies looking for a reporter to find you! You will need Internet access to complete this step, because you will be maintaining this within the APEX web interface.

1. Select the **Profile and Rates** from the Apex menu at the top of your CATalyst screen

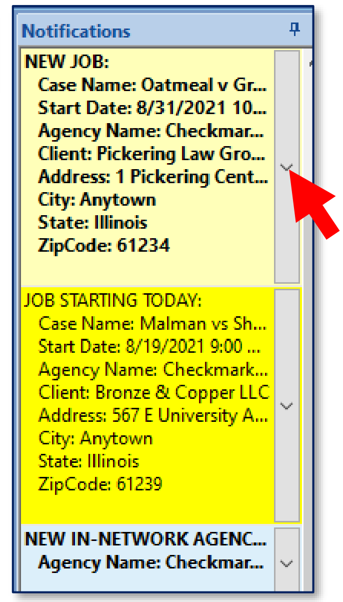


2. A dialog will appear with three tabs. **In-Network** will list agencies that you already have a relationship with (once you select them and they respond). **Pending** will list the agencies that you have invited and who have not yet responded. **Add New** will list both of the above, and allow you to search for agencies you'd like to connect with. Enter their name, city, or even their state to begin your search, select the desired agency, and click the **Invite** button at the bottom of your screen.



What's Next? It all starts with a Job Proposal

CATalyst now has a notification bell icon in the function bar at the top of your screen. You will see a numeral indicator when you have a notification, and if you don't have your **Notifications Pane** open, clicking the bell will open this pane to reveal your messages.

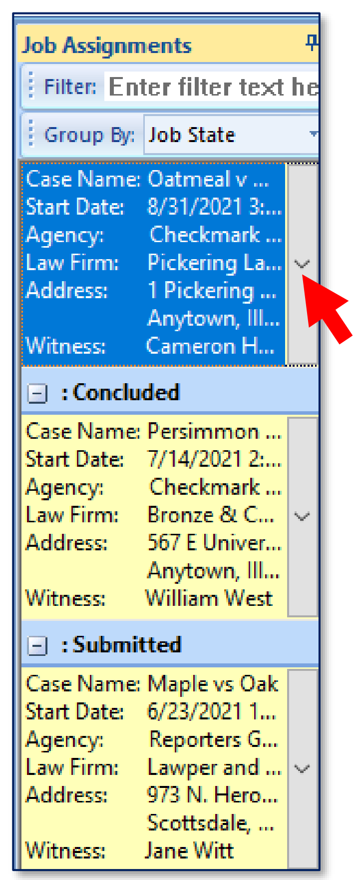


Click the grey menu bar to the right of each job to take action or clear the Notification.

If you are away from CATalyst, don't worry—you will get an email notification to the email address you used when you registered for APEX. Click the link in that email to access the proposal in APEX and accept.

If your **Profile** included a checkmark in the preference to receive SMS (Text) messages, you will also get a text message with a link.

Keeping track of Jobs



The Job Assignments pane will help you keep track of the jobs that you have in progress.

The jobs can be sorted by **Job State** or **Date**.

Click the grey menu bar to the right of each job to take action.

APEX Job Workflow

APEX jobs will have a consistent process for all agencies with whom you work. The process is described below.

	Step	Where to find it	Actions
1	You receive a **NEW JOB Proposal**	Notifications Pane Email Text Message (if enabled SMS messaging in your Profile)	**Accept** or **Reject** the proposal. **View Details** to learn more about the time, location, and other details If you take no action, the proposal may expire and you will no longer be able to accept.
2	If you have accepted the proposal, the job will be awaiting confirmation until the agency has confirmed that you are the reporter that they have selected. If you have been confirmed by the agency, you will find the job in the Job State **Assigned**.	Calendar Job Assignments Pane	Wait for confirmation notification. There may be more than one reporter who accepted, so the agency will confirm when they make the selection. You can **Cancel** if you find that you are no longer able to cover that job.
4	Set Job State to **Concluded** when proceeding has ended.	Calendar Job Assignments Pane	Select **Conclude Job** for a job that is in the **Assigned** state. This change of state will update to the agency through Apex when you are connected to the Internet, to keep them informed.
5	Submit files and set Job State to **Submitted**.	Calendar Job Assignments Pane	You may be submitting roughs (aka dailies), final transcript, exhibits, or even receipts. Your action choices are to **Submit Files** or **View Job** if you want to refresh your memory about the details of the job. When you are done submitting everything to the agency for the job, you will change the status by selecting an **All Files Submitted** button on the upload screen.
6	Jobs in the submitted state are ready for **Invoicing**.	Job Assignments Pane Business Center	From the list of jobs in Submitted state, you can choose to **Prepare Invoice**, **View Files**, or **View Job**. When you create an invoice, it will go directly to the agency.
7	**Invoiced**	Business Center (Invoices Tab)	Invoices submitted will be listed with indication of payment status.

Other notes:

- If you enrolled in the Stenograph Loyalty Program (on your profile), you will earn loyalty points for each job completed, and be able to use those points for dollars off on Stenograph products and services. For more information on that program, go to www.stenograph.com/loyalty
- You will also see a Job State category for **Cancelled** within the Job Assignments pane. This gives you the opportunity to submit an invoice, in the case of a late cancelled job.

Version 21.5 “Wow!” Features

This release of CATalyst is all about extending the capabilities of CATalyst to enhance the productivity of reporters through integration with APEX, Stenograph’s new workflow solution for agencies. These new features allow you to increase efficiency and handle all aspects of the job—from scheduling to billing, and everything in between, all from your CATalyst desktop.

Gain back a month of time, up to $5,000 in revenue opportunity a year. Also, reporters can earn on average up to $400 in Loyalty points for being part of the APEX ecosystem.

Features	Reporter Benefit
Connect with Agencies within APEX Ecosystem	**Connect to agencies you already work with and find new ones**, without having to browse multiple sites.
Create a Profile	Create a profile that **communicates your credentials and capabilities** to agencies without having to discuss by phone or email. Let agencies know that you have familiarity with terms related to a complex topic, that you are open to virtual proceedings, or willing to accept jobs that require out-of-town travel.
Set up Rate Cards	Your profile can include your **default rates**, but you can also **create custom rate cards** for different regions, specific agencies, types of jobs, etc. that will help you when you prepare invoices in the new CATalyst Business Center.
Job Calendar	Jobs accepted through APEX will appear within the CATalyst job calendar once accepted. Block time when you are unavailable, **and you won’t receive job requests for those blocked dates/times.**
Notifications	Within CATalyst, you will receive notifications—a new agency wants to connect, there is a job proposal for you to accept or reject, or there has been a change to a time or location. **You can acknowledge these in just a few seconds when you’re off the record, without having to check your email, voice messages, or texts.**
Job Assignments Pane	**Keep track of all of the jobs that you’ve accepted and see their status at a glance** within CATalyst. From here you can take immediate action—such as start translation for a job, submit a transcript that your editor has just finished reviewing, or begin to create an invoice for a finished job.

Continued on next page…

Features	Reporter Benefit
Job Details are Automatically Integrated	Details about the job such as time, location, witness name, attorneys expected to appear, and more are automatically provided from APEX, directly to your CATalyst job file. **If things change, you won't have to manage emails and texts from the agency**, as these details will update in CATalyst. From there, you can incorporate information from the APEX job details as **fields in your include files, so that the job worksheet, title page, and appearance page contain this information without having to re-key it.**
Submit Transcripts from CATalyst	**No need to keep track of which agency uses Dropbox vs. an FTP site or manage multiple login credentials.** When your transcript is complete, you can submit transcript, exhibits, and other job materials directly from CATalyst through APEX.
New CATalyst Business Center	Create an invoice within CATalyst with an integrated process that intuitively starts with job details and aligns with services ordered on job worksheet. Includes **submitting the invoice to the agency, accepting electronic payment, and tracking payment status.**
Loyalty Program	Earn points for interacting with APEX, and for doing actions you already do. Points can be earned for renewing Edge, purchasing CATalyst, and joining Ascend training.

08/2021

All of us at Stenograph would like to thank you for relying on CATalyst for the important work that you do. We are committed to continuing the tradition of adding features and functionality to make you more efficient, and your business more profitable.

This guide has gotten you off to a great start! Our Training Agents will soon be ready to help you, as are Stenograph Technical Support—and look for webinars, training and tips on Stenograph's Ascend Training Network. If you haven't tried your free month of Ascend to see if it's right for you, now is a great time to start.

Let the agencies you work with know that you are set up and ready to receive job requests through APEX!