Notifications Pane

Description:

The Notifications pane provides a location for you to receive and act on notifications about Apex Agency invitations, Proposed Apex Jobs and existing Accepted/Modified Apex Jobs. The Notifications pane, viewable in Manage Jobs, organizes your notifications in date order. The newest notifications display at the top of the pane. You can choose to keep individual notifications or dismiss them. The actions you take on the individual notifications will also influence which notifications continue to display in the Notifications pane.

The Notifications pane works in concert with the Notifications Bell icon. When a new/unread Notification is present, the Notifications Bell icon displays the number of new/unread notifications are available. This gives you the ability to visibly see when there are notifications from anywhere in Case CATalyst even when the Notifications pane is not displayed. After being alerted to new/unread notifications, you may view the specific details of each notification by viewing the Notifications pane in Manage Jobs.

The text of New/unread notifications will appear bold in the Notifications pane.

How to Use it:

To view the Notifications pane, do the following:

1. From Manage Jobs, click **Function**, **Notifications** *(Alt + u, o)*.

Or

1. You may open the Notifications pane from anywhere in Case CATalyst by clicking the Notifications Bell icon. The Notifications Bell icon is available on the Function toolbar, or on the far right side of the status bar at the bottom of the Case CATalyst screen. clicking the Notifications Bell icon will switch your view to the Manage Jobs screen and display the Notifications pane.

Additional Information:

The Notifications pane opens docked to the right edge of the screen by default. Like other panes in Case CATalyst, the Notifications pane can be docked to other screen edges, resized, floated, pinned, hidden and docked to other panes.

New Agency Invite

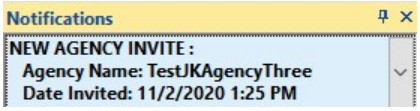
Description:

When an Apex Agency invites you to join their network of reporters, you will receive a NEW AGENCY INVITE notification. The NEW AGENCY INVITE will appear in the Notifications pane inside of Case CATalyst. The Notifications Bell icon in Case CATalyst will also reflect the existence of a new notification. If there were no new/unread notifications, the Notifications Bell will show the number 1 after the NEW AGENCY INVITE notification is received.

The Notifications pane allows you to act on the NEW AGENCY INVITE notification. You must be logged in to your Apex account to receive a NEW AGENCY INVITE notification. If an Apex Agency sends you an invitation to join their network of reporters while you are not logged in to your Apex account in Case CATalyst, you will receive the NEW AGENCY INVITE notification the next time you are logged in to your Apex account.

How to Use it:

The NEW AGENCY INVITE notification displays the name of the Agency that sent you the invitation and the date and time the invitation was sent.



To take action on the NEW AGENCY INVITE notification do the following:

1. In the Notifications pane, click the **down arrow** to the right of the NEW AGENCY INVITE notification to display the actions context menu for the proposal. You may also press *ENTER* to open the actions context menu if the NEW AGENCY INVITE is already highlighted.

Accept - New Agency Invite

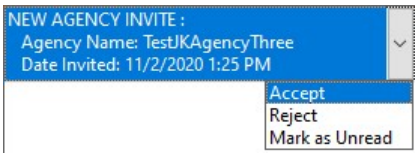
Description:

The Accept context menu action allows you to accept the agency's invitation to become an in-network reporter. When you accept the agency's invitation your Apex account information will appear as an in-network reporter for the agency. This will make it easier for the agency to send you Apex Job proposals.

You must be logged in to your Apex account for the Apex Agency to be notified that you accepted the invitation.

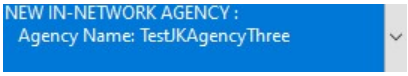
How to Use it:

To Accept a NEW AGENCY INVITE do the following:



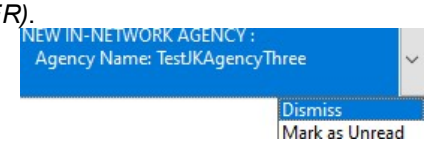
1. With the actions context menu for the NEW AGENCY INVITE notification open, click **Accept**. You may also down arrow to **Accept** and press *(ENTER)*.

The NEW IN-NETWORK AGENCY notification will replace the NEW AGENCY INVITE notification. This indicates that your acceptance was successfully sent to the Apex Agency.



The NEW IN-NETWORK AGENCY notification will remain in the Notifications pane until you dismiss the notification. Dismissing the notification only removes it from the Notifications pane. The Apex Agency will continue to be an in-network agency. To dismiss the NEW IN-NETWORK AGENCY notification do the following:

1. With the actions context menu for the NEW IN-NETWORK AGENCY notification open, click **Dismiss**. You may also down arrow to **Dismiss** and press *(ENTER)*.



Reject - New Agency Invite

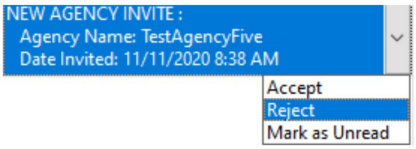
Description:

The Reject context menu action allows you to reject the agency's invitation to become an in-network reporter. When you reject the agency's invitation the NEW AGENCY INVITE notification will be removed from the Notifications pane.

You must be logged in to your Apex account to reject the NEW AGENCY INVITE.

How to Use it:

To reject a NEW AGENCY INVITE do the following:

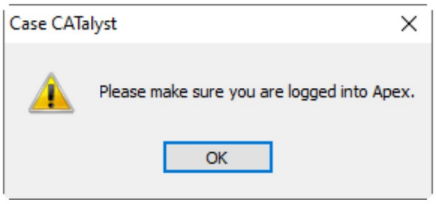


1. With the actions context menu for the NEW AGENCY INVITE notification open, click **Reject**. You may also down arrow to **Reject** and press *(ENTER)*.

The NEW AGENCY INVITE notification will be removed from the Notifications pane. This indicates that you successfully rejected the invitation.

Additional Information:

If you are not logged in to Apex or there is some service interruption when attempting to reject a NEW AGENCY INVITE, Case CATalyst will display the following message:



Click **OK** *(ENTER)* to close the message box. Try rejecting the NEW AGENCY INVITE the next time you are successfully logged in to your Apex account.

Mark as Unread - New Agency Invite

Description:

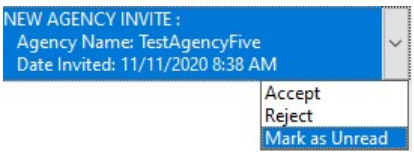
The Mark as Unread context menu action allows you to set the NEW AGENCY INVITE notification inside of the Notifications pane back to an unread state. When you click on the NEW AGENCY INVITE notification and/or access the context menu for the notification, it gets marked as read. The text of a read notification is no long bold and the number for that notification is removed from the Notification Bell Icon. Mark as Unread lets you set the text back to bold and restores the Notification Bell icon number.

You do not need to be logged in to your Apex account to use the Mark as Unread context menu action.

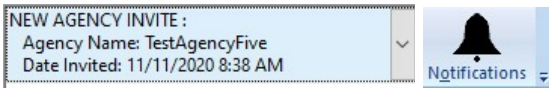
How to Use it:

To use the Mark as Unread context menu action on the NEW AGENCY INVITE notification do the following:

1. With the actions context menu for the NEW AGENCY INVITE open, click **Mark as Unread**. You may also down arrow to **Mark as Unread** and press *(ENTER)*.



Here is how the NEW AGENCY INVITE notification and the Notifications Bell icon looked before Mark as Unread:



Here is how the NEW AGENCY INVITE notification and the Notifications Bell icon looks after Mark as Unread:

New Job Proposal

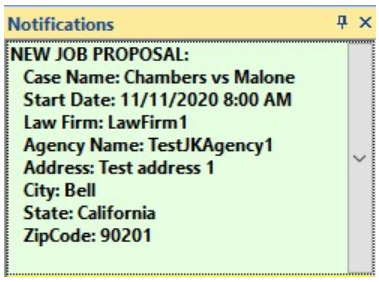
Description:

When an Apex Agency invites you to take a new Apex Job, you will receive a NEW JOB PROPOSAL notification. The NEW JOB PROPOSAL will appear in the Notifications pane inside of Case CATalyst. The Notifications Bell icon in Case CATalyst will also reflect the existence of a new notification. If there were no new/unread notifications, the Notifications Bell will show the number 1 after the NEW JOB PROPOSAL is received.

The Notifications pane allows you to act on the NEW JOB PROPOSAL notification. You must be logged in to your Apex account to receive a NEW JOB PROPOSAL notification. If an Apex Agency sends you an Apex Job proposal while you are not logged in to your Apex account in Case CATalyst, you will receive the Apex Job proposal the next time you are logged in to your Apex account.

How to Use it:

The NEW JOB PROPOSAL notification displays information about the Apex Job to help you make a decision on the proposal. This information includes:



- The name of the Case for the Apex Job (Case Name:)
- The starting date and time for the Apex Job (Start Date:)
- The ordering law firm for the Apex Job (Law Firm:)
- The Apex Agency that sent you the Apex Job proposal (Agency Name:)
- The location of the Apex Job (Address:)

To take action on the NEW JOB PROPOSAL notification do the following:

1. In the Notifications pane, click the **down arrow** to the right of the NEW JOB PROPOSAL notification to display the actions context menu for the proposal. You may also press *ENTER* to open the actions context menu if the NEW JOB PROPOSAL is already highlighted.

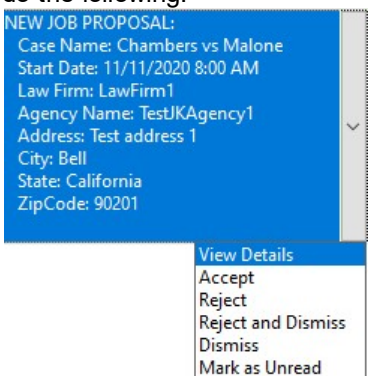
View Details - New Job Proposal

Description:

You may want to use the View Details context menu action before accepting or rejecting the proposed Apex Job. The View Details context menu action lets you see extensive details about the Apex Job proposal. More than is displayed by the New Job Proposal notification alone. Selecting the View Details context menu action for the Apex Job proposal will open the Apex Job Details dialog.

How to Use it:

To view the Apex Job Details dialog for the New Job Proposal notification do the following:



1. With the actions context menu for the New Job Proposal open, click **View Details**. You may also down arrow to **View Details** and press *(ENTER)*.

Apex Job Details

The Apex Job Details dialog provides expanded details about the Apex Job. Some of this expanded information includes:

Job Info: - Provides expanded information about the Apex Job beyond what is displayed by the New Job Proposal notification.

- Attorney Name
- Litigation Type
- Proposal Notes - This is a note written by the Apex Agency when sending the Apex Job Proposal to you.

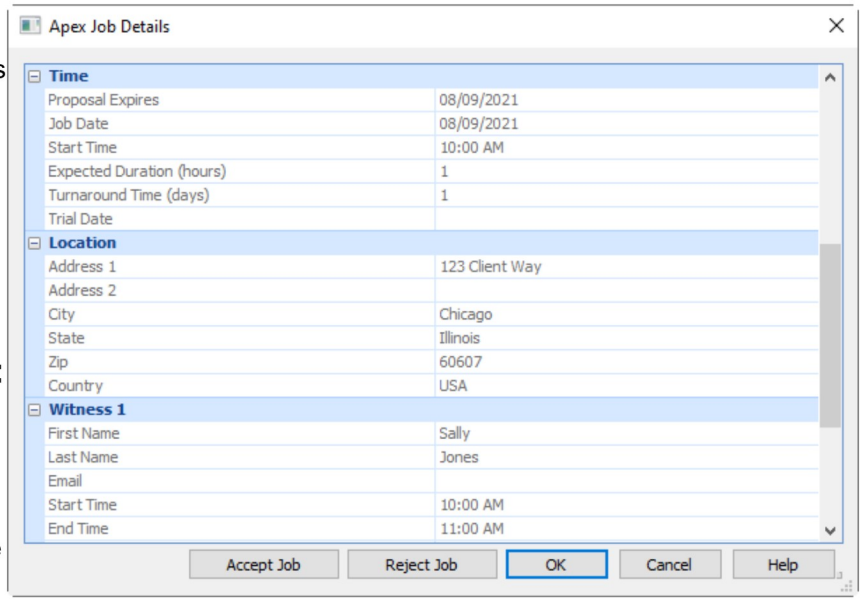
Time: - Provides expanded information about the Apex Job times beyond what is displayed by the New Job Proposal notification.

- Expected Duration (hours)

- Turnaround Time (days)

Witness: - Provides expanded information about each witness of the Apex Job

- First Name
- Last Name
- Start Time
- End Time



Additional Information:

After viewing the expanded details provided by the Apex Job Details dialog, you may choose to print the Apex Job Details information, accept the Apex Job proposal, reject the Apex Job proposal, or close the Apex Job Details dialog without taking further action.

To accept the Apex Job proposal, click **Accept Job** *(Alt + a).*

To reject the Apex Job proposal, click **Reject Job** *(Alt + r).*

To close the Apex Job Details without taking action on the Apex Job proposal, click **OK** *(ENTER)*.

Accept - New Job Proposal

Description:

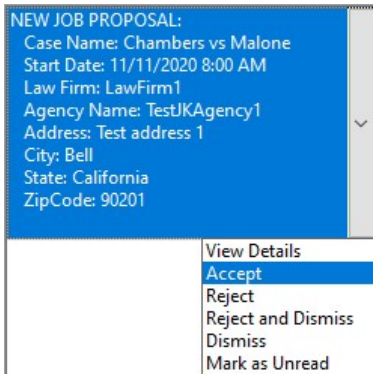
The Accept context menu action allows you to accept the Apex Job proposal. When you accept an Apex Job proposal, you are letting the Apex Agency know that you are able to work the Apex Job. However, that does not mean you have been given the Apex Job. The Apex Agency must confirm your acceptance of the Apex Job. The Notifications pane will provide you with a notification once the Apex Agency has confirmed you for the Apex Job. A confirmed Apex Job will also appear in the Case CATalyst Job Assignments pane.

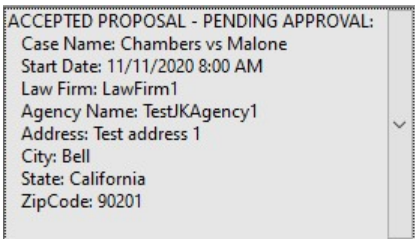
You must be logged in to your Apex account for the Apex Agency to be notified that you accepted an Apex Job proposal.

How to Use it:

To Accept an Apex Job proposal do the following:

1. With the actions context menu for the New Job Proposal open, click **Accept**. You may also down arrow to **Accept** and press *(ENTER)*.

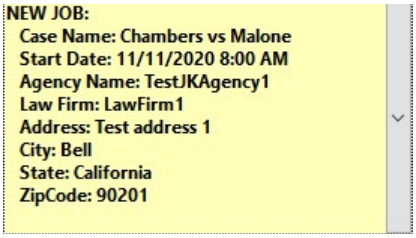




The ACCEPTED PROPOSAL - PENDING APPROVAL notification will replace the NEW JOB PROPOSAL notification. The ACCEPTED PROPOSAL - PENDING APPROVAL notification indicates that your acceptance of the Apex Job has been sent to the Apex Agency. However, the Apex Agency must confirm your acceptance before you will be assigned the Apex Job.

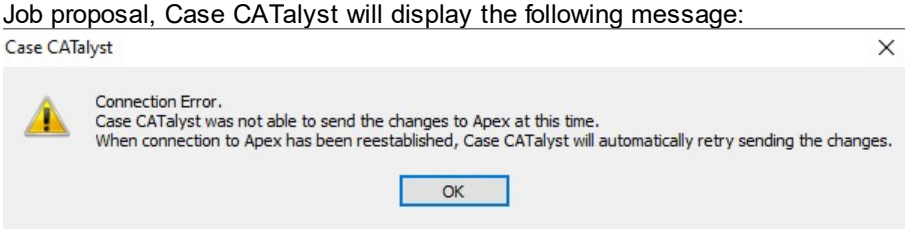
The ACCEPTED PROPOSAL - PENDING APPROVAL notification provides the same context menu actions as the NEW JOB PROPOSAL notification. This means you may still reject the Apex Job proposal.

Once the Apex Agency has confirmed your acceptance of the Apex Job proposal, the ACCEPTED PROPOSAL - PENDING APPROVAL notification will be replaced by a NEW JOB notification.



Additional Information:

If you are not logged in to Apex or there is some service interruption when attempting to accept an Apex Job proposal, Case CATalyst will display the following message:



Click **OK** *(ENTER)* to close the message box. Case CATalyst will attempt to send your Apex Job proposal acceptance the next time you are logged in to Apex or the service interruption is resolved.

You will not be allowed to accept an Apex Job proposal for either of the following reasons:

1. The start date and start time for the Apex Job has passed.
2. The date set by the Apex Agency for when the Apex Job proposal must be accepted by has passed.

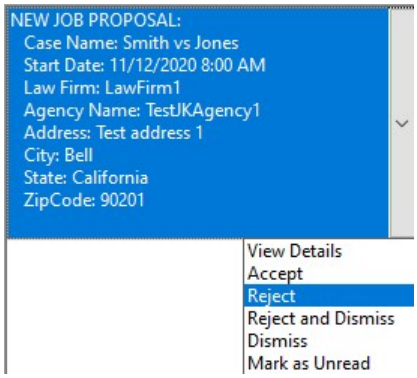
Case CATalyst will display an error message if you try to Accept an Apex Job that can no longer be accepted.

Reject - New Job Proposal

Description:

The Reject context menu action allows you to reject the Apex Job proposal. When you reject an Apex Job proposal, you are letting the Apex Agency know that you are not able to work the Apex Job. A REJECTED PROPOSAL notification will appear in the Case CATalyst Notifications pane when the reject action for the Apex Job has been successfully sent to Apex.

You must be logged in to your Apex account for the Apex Agency to be notified that you rejected an Apex Job proposal.

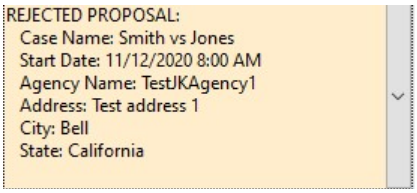


How to Use it:

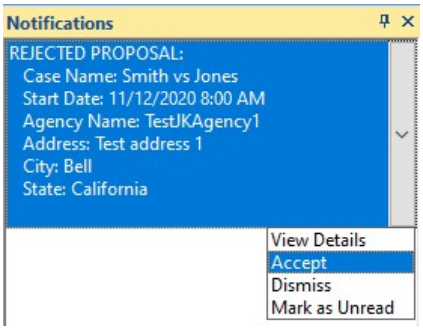
To Reject an Apex Job proposal do the following:

1. With the actions context menu for the New Job Proposal open, click **Reject**. You may also down arrow to **Reject** and press *(ENTER)*.

The REJECTED PROPOSAL notification will replace the NEW JOB PROPOSAL notification. The REJECTED PROPOSAL notification indicates the Apex Agency has been notified you rejected the Apex Job proposal.



The advantage of receiving a REJECTED PROPOSAL notification is that it offers you to ability to change your answer. If you selected Reject by accident or you are now able to Accept the Apex Job proposal, the REJECTED PROPOSAL notification can be used to Accept the Apex Job proposal. To accept a previously rejected Apex Job proposal do the following on the REJECTED PROPOSAL notification:

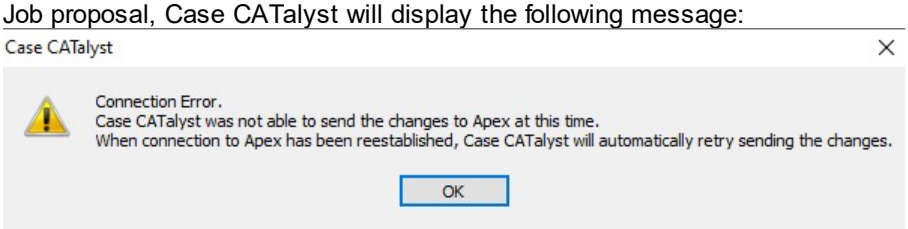


1. In the Notifications pane, click the **down arrow** to the right of the REJECTED PROPOSAL notification to display the actions context menu. You may also press *ENTER* to open the actions context menu if the REJECTED PROPOSAL notification is already highlighted.
2. Click **Accept**. You may also down arrow to **Accept** and press *(ENTER)*.

Just as when accepting an Apex Job proposal from the NEW JOB PROPOSAL notification, you will receive an ACCEPTED PROPOSAL - PENDING APPROVAL notification and the Apex Agency will need to confirm you for the Apex Job.

Additional Information:

If you are not logged in to Apex or there is some service interruption when attempting to reject an Apex Job proposal, Case CATalyst will display the following message:



Click **OK** *(ENTER)* to close the message box. Case CATalyst will attempt to send your Apex Job proposal rejection the next time you are logged in to Apex or the service interruption is resolved.

Reject and Dismiss - New Job Proposal

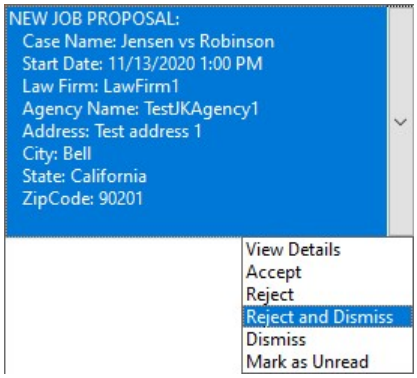
Description:

Like the Reject context menu action, the Reject and Dismiss context menu action allows you to reject the Apex Job proposal and let the Apex Agency know you are not able to work the proposed Apex Job. The difference is Reject and Dismiss will not create a REJECTED PROPOSAL notification in the Case CATalyst Notifications pane when the reject action for the Apex Job has been successfully sent to Apex. Reject and Dismiss is a good options to pick for rejecting an Apex Job proposal when you are confident you won't change your mind and wont want to accept the proposal later.

You must be logged in to your Apex account for the Apex Agency to be notified that you rejected an Apex Job proposal.

How to Use it:

To Reject and Dismiss an Apex Job proposal do the following:

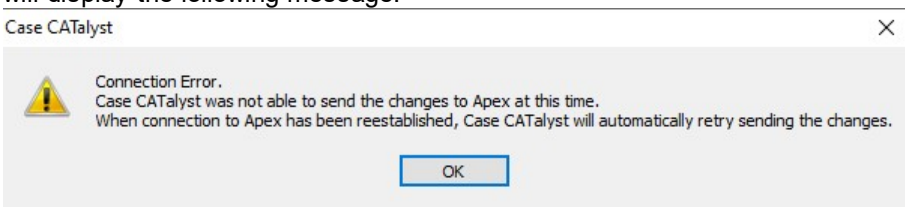


1. With the actions context menu for the New Job Proposal open, click **Reject and Dismiss**. You may also down arrow to **Reject and Dismiss** and press *(ENTER)*.

The NEW JOB PROPOSAL notification will be removed from the Notifications pane. You will not receive a REJECTED PROPOSAL notification.

Additional Information:

If you are not logged in to Apex or there is some service interruption when attempting to Reject and Dismiss an Apex Job proposal, the NEW JOB PROPOSAL notification will still be removed from the Notifications pane and Case CATalyst will display the following message:



Click **OK** *(ENTER)* to close the message box. Case CATalyst will attempt to send your Apex Job proposal rejection the next time you are logged in to Apex or the service interruption is resolved.

Dismiss - New Job Proposal

Description:

Accepting or rejecting a NEW JOB PROPOSAL notification is not a requirement. The Dismiss context menu action allows you to remove the NEW JOB PROPOSAL notification from the Notifications panes and take no action on the Apex Job proposal. No information will be sent to the Apex Agency when you dismiss an Apex Job proposal. The Dismiss context menu action also allows you to remove old Apex Job proposals that you took no actions.

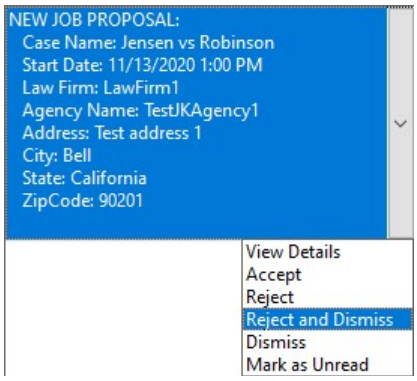
You do not need to be logged in to your Apex account to use the Dismiss context menu action.

How to Use it:

To Dismiss an Apex Job proposal do the following:

1. With the actions context menu for the New Job Proposal open, click **Dismiss**. You may also down arrow to**Dismiss** and press *(ENTER)*.

The NEW JOB PROPOSAL notification will be removed from the Notifications pane.



Mark as Unread - New Job Proposal

Description:

The Mark as Unread context menu action allows you to set the NEW JOB PROPOSAL notification inside of the Notifications pane back to an unread state. When you click on the NEW JOB PROPOSAL notification and/or access the context menu for the notification, it gets marked as read. The text of a read notification is no long bold and the number for that notification is removed from the Notification Bell Icon. Mark as Unread lets you set the text back to bold and restores the Notification Bell icon number.

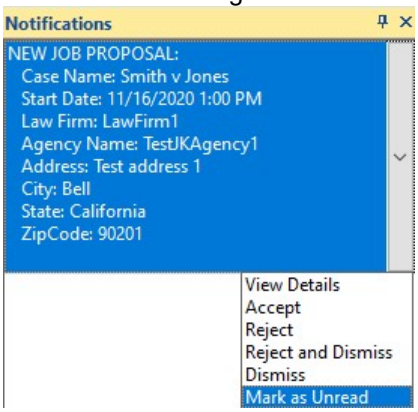
As an example, let's say you wanted to use View Details to learn about the Apex Job proposal now, but you wanted to wait until later to decide if you are going to accept or reject the job. After selecting View Details, the NEW JOB PROPOSAL notification will be in a read state. As a result, you are no longer being alerted that there is a notification. To be sure you remember to take action on the NEW JOB PROPOSAL late, you can use Mark as Unread. Now, the Notification Bell icon number you will be reminded of the NEW JOB PROPOSAL notification.

You do not need to be logged in to your Apex account to use the Mark as Unread context menu action.

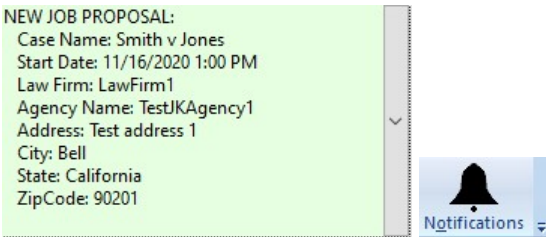
How to Use it:

To use the Mark as Unread context menu action on an Apex Job proposal do the following:

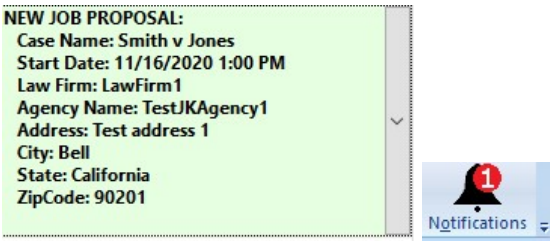
1. With the actions context menu for the NEW JOB PROPOSAL open, click **Mark as Unread**. You may also down arrow to **Mark as Unread** and press *(ENTER)*.



Here is how the NEW JOB PROPOSAL notification and the Notifications Bell icon looked before Mark as Unread:



Here is how the NEW JOB PROPOSAL notification and the Notifications Bell icon looks after Mark as Unread:



Job Starting Today

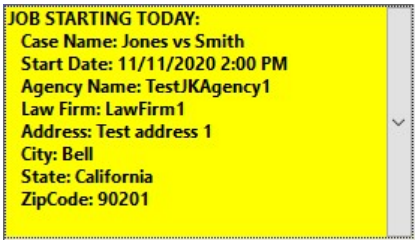
Description:

As a helpful reminder of your scheduled Apex Jobs, the Notifications pane will display a JOB STARTING TODAY notification on the day of a scheduled Apex Job. The Notifications Bell icon in Case CATalyst will also reflect the existence of the notification. If there were no new/unread notifications, the Notifications Bell will show the number 1 after the JOB STARTING TODAY notification is received.

You do not need to be logged in to your Apex account for the JOB STARTING TODAY notification to appear.

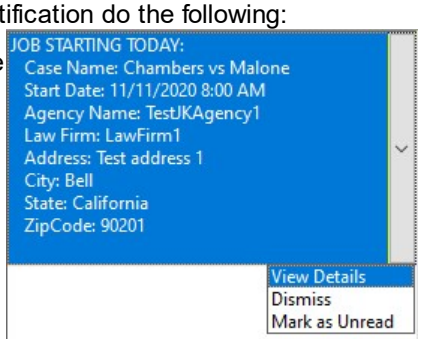
How to Use it:

The JOB STARTING TODAY notification displays information about the Apex Job. This information includes:



- The name of the Case for the Apex Job (Case Name:)
- The starting date and time for the Apex Job (Start Date:)
- The Apex Agency that sent you the Apex Job (Agency Name:)
- The ordering law firm for the Apex Job (Law Firm:)
- The location of the Apex Job (Address:)

To view the actions context menu for the JOB STARTING TODAY notification do the following:



1. In the Notifications pane, click the **down arrow** to the right of the JOB STARTING TODAY notification to display the actions context menu for the notification. You may also press *ENTER* to open the actions context menu if the JOB STARTING TODAY is already highlighted.

View Details - Job Starting Today

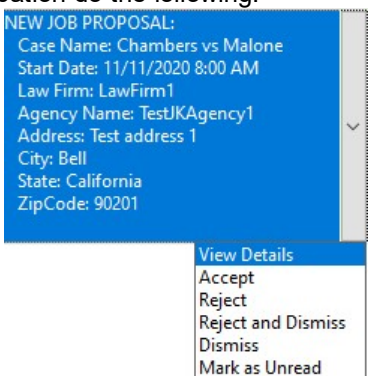
Description:

The View Details context menu action lets you see extensive details about the Apex Job referenced by the JOB STARTING TODAY notification. More than is displayed by the JOB STARTING TODAY notification alone. Selecting the View Details context menu action for the JOB STARTING TODAY notification will open the Apex Job Details dialog.

You do not need to be logged in to your Apex account to view the Apex Job Details dialog. You will need to be logged in to your Apex if you want to send modifications you make to the Apex Job details to the Apex Agency.

How to Use it:

To view the Apex Job Details dialog for the JOB STARTING TODAY notification do the following:



1. With the actions context menu for the JOB STARTING TODAY open, click **View Details**. You may also down arrow to **View Details** and press *(ENTER)*.

Apex Job Details

The Apex Job Details dialog provides expanded details about the Apex Job. You may also use the Apex Job Details to modify information about the Apex Job as needed. Information that can be modified will appear bold in the Apex Job Details dialog.

Job Info: - Provides expanded information about the Apex Job beyond what is displayed by the New Job Proposal notification.

- Attorney Name
- Litigation Type

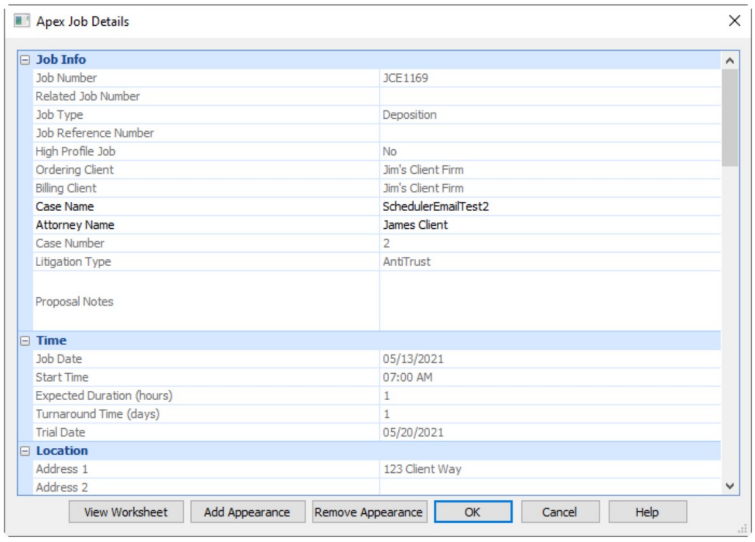
Time: - Provides expanded information about the Apex Job times beyond what is displayed by the New Job Proposal notification.

- Expected Duration (hours)

- Turnaround Time (days)

Witness: - Provides expanded information about each witness of the Apex Job

- First Name
- Last Name
- Start Time
- End Time



Modifying Apex Job Details

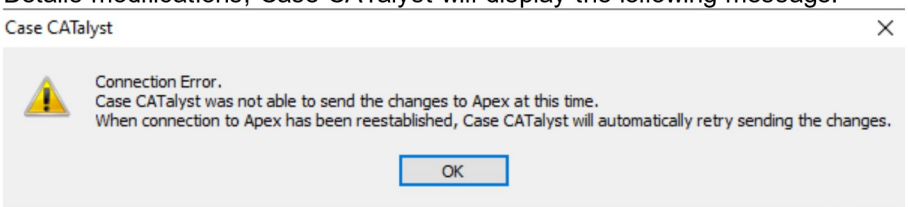
Any Apex Job details appearing in bold can be modified. For example, you may notice that the spelling in the Attorney Name field is incorrect. You can correct the spelling and send the changes to the Apex Agency. This also has the benefit of updating the Apex Fields information you can use when filling in Case CATalyst Fill-in-Fields entries in the transcript for each witness of the Apex Job.

To modify Apex Job details do the following:

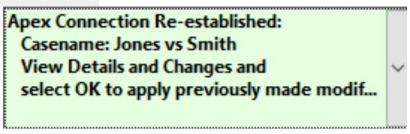
1. Click into the text area of the details you want to modify to place the cursor into that text area.
2. Make the needed modification to the text.
3. Click **OK**. Or press *ENTER* twice.

Additional Information:

If you are not logged in to Apex or there is some service interruption when attempting to send Apex Job Details modifications, Case CATalyst will display the following message:



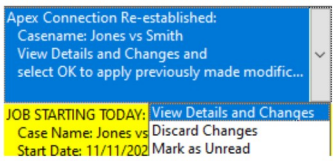
Click **OK** *(ENTER)* to close the message box. You will receive an *Apex Connection Re-established* notification the next time you log in to Apex or the service interruption has been resolved.



To send the modifications to the Apex Agency do the following:

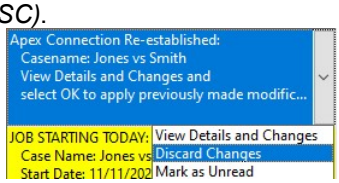
1. Open the actions context menu for the Apex Connection Re-established notification by clicking the down arrow to the right of the notification.
2. With the actions context menu for the Apex Connection Re-established notification open, click **View Details and Changes**. You may also down arrow to **View Details and Changes** and press *(ENTER)*.

The Apex Job Details dialog will open. For each modification you made, you will see the current Apex Job details highlighted in orange and your proposed modifications in red. This allows you to verify that you'd still like to send the Apex Job modifications to the Apex Agency.



To send the changes, click **OK** *(ENTER)*. The Apex Job Details dialog will close and the Apex Connection Re-established notification will be removed from the Notifications pane.

To close the Apex Job Details dialog without taking action, click **Cancel** *(ESC)*.



You may also choose to not send the changes to Apex and remove the Apex Connection Re-established notification from the Notifications pane. To Discard Changes do the following:

1. Open the actions context menu for the Apex Connection Re-established notification by clicking the down arrow to the right of the notification.
2. With the actions context menu for the Apex Connection Re-established notification open, click **Discard Changes**. You may also down arrow to **Discard Changes** and press *(ENTER)*.

The changes will not be sent and the Apex Connection Re-established notification will be removed from the Notifications pane.

Dismiss - Job Starting Today

Description:

The JOB STARTING TODAY notification has a Dismiss context menu action that allows you to remove the JOB STARTING TODAY notification from the Notifications pane. This takes no action on the Apex Job. It only removes the notification from the Notifications pane.

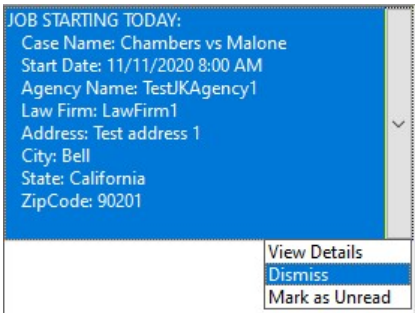
You do not need to be logged in to your Apex account to use the Dismiss context menu action.

How to Use it:

To Dismiss a JOB STARTING TODAY notification do the following:

1. With the actions context menu for the JOB STARTING TODAY notification open, click **Dismiss**. You may also down arrow to **Dismiss** and press *(ENTER)*.

The JOB STARTING TODAY notification will be removed from the Notifications pane.



Mark as Unread - Job Starting Today

Description:

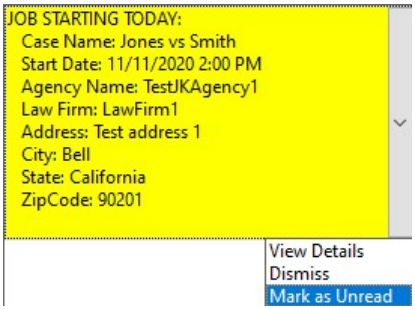
The Mark as Unread context menu action allows you to set the JOB STARTING TODAY notification inside of the Notifications pane back to an unread state. When you click on the JOB STARTING TODAY notification and/or access the context menu for the notification, it gets marked as read. The text of a read notification is no long bold and the number for that notification is removed from the Notification Bell Icon. Mark as Unread lets you set the text back to bold and restores the Notification Bell icon number.

You do not need to be logged in to your Apex account to use the Mark as Unread context menu action.

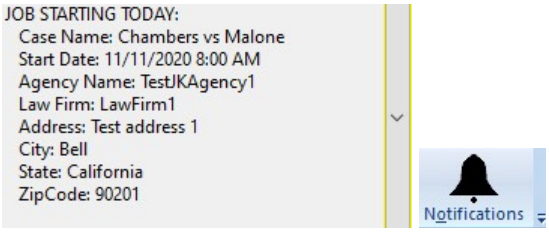
How to Use it:

To use the Mark as Unread context menu action on the JOB STARTING TODAY notification do the following:

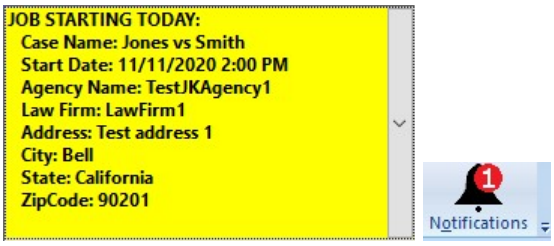
1. With the actions context menu for the JOB STARTING TODAY open, click **Mark as Unread**. You may also down arrow to **Mark as Unread** and press *(ENTER)*.



Here is how the JOB STARTING TODAY notification and the Notifications Bell icon looked before Mark as Unread:



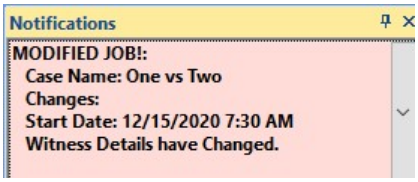
Here is how the JOB STARTING TODAY notification and the Notifications Bell icon looks after Mark as Unread:



Modified Job

Description:

When an Apex Job you have accepted or a proposed Apex Job gets modified by the agency, you will receive a MODIFIED JOB! notification in the Notifications pane. The Notifications Bell icon in Case CATalyst will also reflect the existence of the notification. If there were no new/unread notifications, the Notifications Bell will show the number 1 after the MODIFIED JOB! notification is received.

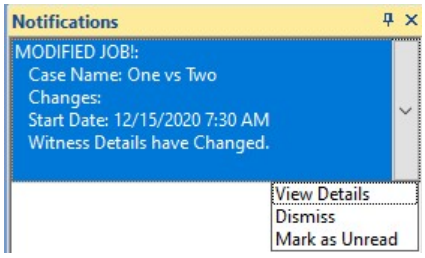


There are many different types of modifications that could have been made to the Apex Job. The MODIFIED JOB! notification will provide "Changes:" information. For example, if information about a witness changes, start time, name, etc... the "Changes:" information will state *Witness Details have Changed*. It is also possible for more than one change to have occurred. The "Changes:" information will list each type of change. For example, let's say witness information and the start time for the job have changed. The "Changes:" information will show *Start Date:* with the new start date and time information and the *Witness Details have Changed* text.

You must be logged in to your Apex account to receive a MODIFIED JOB! notification.

How to Use it:

To view the actions context menu for the MODIFIED JOB! notification do the following:



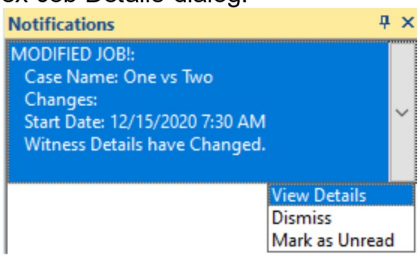
1. In the Notifications pane, click the **down arrow** to the right of the MODIFIED JOB! notification to display the actions context menu for the notification. You may also press *ENTER* to open the actions context menu if the MODIFIED JOB! is already highlighted.

View Details - Modified Job

Description:

The View Details context menu action lets you see specific details about the changes that were made to the Apex Job when you receive a MODIFIED JOB! notification. Selecting the View Details context menu action for the MODIFIED JOB! notification will open the Apex Job Details dialog. The changes made to the Apex Job will be highlighted in the Apex Job Details dialog to make it easier to see exactly what changed.

You do not need to be logged in to your Apex account to view the Apex Job Details dialog.



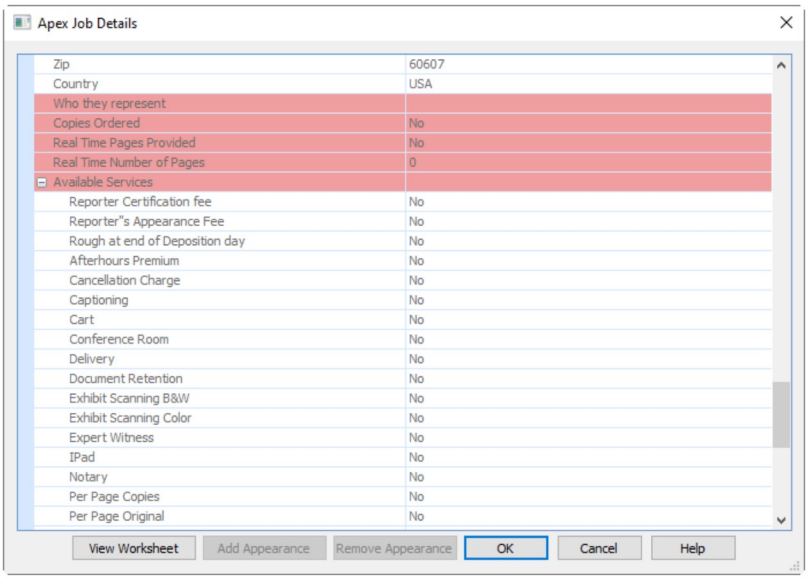
How to Use it:

To view the Apex Job Details dialog for the MODIFIED JOB! notification do the following:

1. With the actions context menu for the MODIFIED JOB! open, click **View Details**. You may also down arrow to **View Details** and press *(ENTER)*.

Apex Job Details

Inside of the Apex Job Details dialog, each change that was made to the Apex Job will be highlighted. There are no actions that you need to take, this is for your information about the Apex Job. After viewing the changes do one of the following:



Closing the Apex Job Details Dialog

When you are viewing the changes made of a MODIFIED JOB! notification in the Apex Job Details dialog there is a difference in using OK or Cancel to close the Apex Job Details dialog:

- Clicking **OK** *[ENTER]* to close the Apex Job Details dialog will stop the highlighting from showing again on the lines that changed. You can think of clicking OK as acknowledging that you've seen the changes. Although, the Apex Agency that made the changes does not know that you have seen them.

- Clicking **Cancel** *[ESC]* to close the Apex Job Details dialog will allow you to open the Apex Job Details dialog again and still see the changes highlighted.

Dismiss - Modified Job

Description:

The MODIFIED JOB! notification has a Dismiss context menu action that allows you to remove the MODIFIED JOB! notification from the Notifications pane. This takes no action on the Apex Job. It only removes the notification from the Notifications pane.

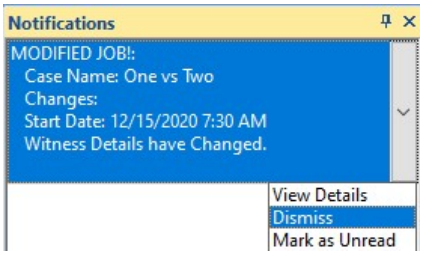
You do not need to be logged in to your Apex account to use the Dismiss context menu action.

How to Use it:

To Dismiss a MODIFIED JOB! notification do the following:

1. With the actions context menu for the MODIFIED JOB! notification open, click **Dismiss**. You may also down arrow to **Dismiss** and press *(ENTER)*.

The MODIFIED JOB! notification will be removed from the Notifications pane.



Mark as Unread - Modified Job

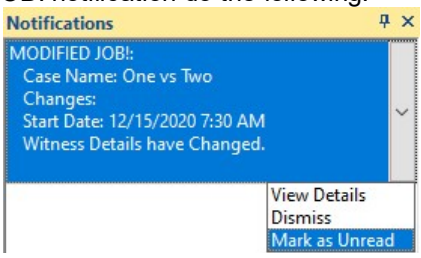
Description:

The Mark as Unread context menu action allows you to set the MODIFIED JOB! notification inside of the Notifications pane back to an unread state. When you click on the MODIFIED JOB! notification and/or access the context menu for the notification, it gets marked as read. The text of a read notification is no long bold and the number for that notification is removed from the Notification Bell Icon. Mark as Unread lets you set the text back to bold and restores the Notification Bell icon number.

You do not need to be logged in to your Apex account to use the Mark as Unread context menu action.

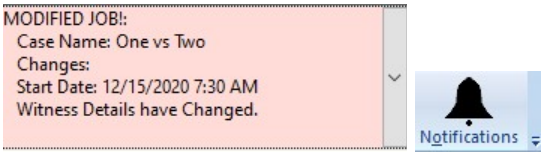
How to Use it:

To use the Mark as Unread context menu action on the MODIFIED JOB! notification do the following:

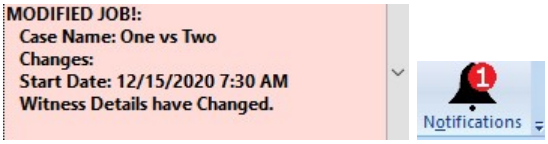


1. With the actions context menu for the MODIFIED JOB! open, click **Mark as Unread**. You may also down arrow to **Mark as Unread** and press *(ENTER)*.

Here is how the MODIFIED JOB! notification and the Notifications Bell icon looked before Mark as Unread:



Here is how the MODIFIED JOB! notification and the Notifications Bell icon looks after Mark as Unread:



Late Cancel Notice

Description:

When an Apex Job you have accepted gets canceled within the late cancellation time you have set in your Apex profile (by default 24 hours) you will receive a LATE CANCEL NOTICE notification. The Notifications Bell icon in Case CATalyst will also reflect the existence of the notification. If there were no new/unread notifications, the Notifications Bell will show the number 1 after the MODIFIED JOB! notification is received.

You must be logged in to your Apex account to receive a LATE CANCEL NOTICE notification.

How to Use it:

To view the actions context menu for the LATE CANCEL NOTICE notification do the following:

1. In the Notifications pane, click the **down arrow** to the right of the LATE CANCEL NOTICE notification to display the actions context menu for the notification. You may also press *ENTER* to open the actions context menu if the LATE CANCEL NOTICE is already highlighted.

Prepare Invoice - Late Cancel Notice

Description:

The Prepare Invoice action lets you create and send an invoice to receive payment for the late cancellation of the Apex job. If an invoice has already been created for the Apex job, the Prepare Invoice option can be used to view the details of the invoice.

You must be logged in to Apex to use the Prepare Invoice option.

How to Use it:

If an invoice has not already been created for the Apex job, selecting the Prepare Invoice option, will display a series of screens to step you through creating the invoice. If an invoice has already been created, a screen will display to let you view the details of the invoice.

Create Invoice - Bill To

The *Create Invoice - Bill To* dialog is the first screen of invoice creation. You may take the following actions in this dialog:

- **Add Customer button** - you may use this button to add new Business Center customers to your list of available customers. However, for the purposes of creating an invoice for the current Create Invoice action, this will have no effect on the invoice you are creating. Since the customer (Apex Agency) is already established for the Apex job, the customer information is already filled in. You will see the customer information already available in the "existing customer" form below the Add Customer button.
- **Customer Details** button - this button is informational only. Clicking the button will display the Customer Details dialog. You may view the customers that are part of the Company (Apex Agency) you are invoicing.

To proceed with the invoice creation process, click the **Next >** button (*Alt* + *n*) or [ENTER]. The *Create Invoice - Job Info* dialog will appear.
To exit the invoice creation process, click the 'x' icon in the upper right of the dialog, or press [ESC].

Create Invoice - Job Info

The *Create Invoice - Job Info* dialog is informational only. It allows you to confirm you are creating an invoice for the correct Apex job. Date, Time, Case Number and Location information is provided for the Apex job.

To proceed with the invoice creation process, click the **Next >** button (*Alt* + *n*) or [ENTER]. The *Create Invoice - Line Items* dialog will appear.
To exit the invoice creation process, click the 'x' icon in the upper right of the dialog, or press [ESC].

Create Invoice - Line Items

The *Create Invoice - Line Items* dialog is where you will create the line items and pricing for the invoice. To create line items for the invoice, do the following:

Ratecard:

Use the *Ratecard:* field to select the appropriate service rates for the invoice. You may access the *Ratecard:* field by clicking the drop-down arrow to the right of the field or by pressing (*Alt* + *r*).

Transcript Name:

Use the *Transcript Name:* field to select the appropriate transcript name for the invoice. If there are multiple witnesses for the Apex Job, you will be able to select the appropriate transcript for this invoice. You may access the *Transcript Name:* field by clicking the drop-down arrow to the right of the field or by pressing (*Alt* + *t*).

Services:

Use the *Services:* field to select the appropriate services to add to the invoice. To add additional services, do the following:

1. Select the service from the *Services:* drop-down list. Click the drop-down arrow to the right of the *Services*: field to show the list of services. The services shown match your currently available services.
2. Select the service you'd like to add to the invoice from the list.
3. Click the **Add Line Item** button, to add the selected service to the invoice.

   <Create New Service>

   The <Create New Service> entry on the Services drop-down list is a special selection that lets you create a new service during the invoice creation. This will add the newly created service to the current invoice. To create a new service, do the following:

   1. Select <Create New Service> from the Services drop-down list. The Add New Service dialog will display. In the Add New Services dialog, do the following:
      a. Type a name for the new service into the *Service Name:* field.
      b. Use the Unit Type: drop-down list to select the type of fee for the new service. For example, Per Page, Flat Fee...
      c. Provide the price for the new service in the *Price Per Unit (USD):* field.
      d. Click the Add Service button.
4. Continue using the Services drop-down field and the Add Line Item button to add as many services as required for the invoice.

Removing a previously selected service

If you need to remove a selected service, you may right-click on the service in the list of selected services on the Create Invoice - Line Items dialog and then click **Remove**.

When Finished Adding Services

When you are finished adding services to the invoice, click the **Next >** button (*Alt* + *n*). The *Create Invoice - Review* dialog will appear.
To exit the invoice creation process, click the 'x' icon in the upper right of the dialog, or press [ESC].

Create Invoice - Review

The *Create Invoice - Review* dialog provides one more opportunity to make sure the invoice is correct before submitting the invoice.

Submitting the Invoice

If the invoice is correct, click the **Submit** button. The "*Are you sure you want to submit this invoice? A PDF of the invoice will be emailed to the entity you are billing.*" message will display. Do one of the following:

1. Click **Yes** [ENTER] to submit the invoice. The invoiced party will receive an email with a PDF copy of the invoice.

or

1. Click **No** [ESC] to return to the *Create Invoice - Review* dialog without sending the invoice.

If you need to go back to the previous screen to fix any of the invoice items, you may click the **<Back** button (*Alt* + *b*) to return to the previous Create Invoice screen.

View Details - Late Cancel Notice

Description:

The View Details context menu action lets you see extensive details about the Apex Job referenced by the LATE CANCEL NOTICE notification. More than is displayed by the LATE CANCEL NOTICE notification alone. Selecting the View Details context menu action for the LATE CANCEL NOTICE notification will open the Apex Job Details dialog.

You do not need to be logged in to your Apex account to view the Apex Job Details dialog. You will need to be logged in to your Apex if you want to send modifications you make to the Apex Job details to the Apex Agency.

How to Use it:

To view the Apex Job Details dialog for the LATE CANCEL NOTICE notification do the following:

1. With the actions context menu for the LATE CANCEL NOTICE open, click **View Details**. You may also down arrow to **View Details** and press *(ENTER)*.

Apex Job Details

The Apex Job Details dialog provides expanded details about the Apex Job:

Job Info: - Provides expanded information about the Apex Job beyond what is displayed by the LATE CANCEL NOTICE notification.

- Attorney Name
- Litigation Type

Time: - Provides expanded information about the Apex Job times beyond what is displayed by the LATE CANCEL NOTICE notification.

- Expected Duration (hours)
- Turnaround Time (days)

Witness: - Provides expanded information about each witness of the Apex Job

- First Name
- Last Name
- Start Time
- End Time

Additional Information

After viewing the expanded details provided by the Apex Job Details dialog, you may choose the View Worksheet option to view the worksheet for the Apex job, or you may close the Apex Job Details dialog.

Dismiss - Late Cancel Notice

Description:

The Dismiss context menu action allows you to remove the LATE CANCEL NOTICE notification from the Notifications pane.

You do not need to be logged in to your Apex account to use the Dismiss context menu action.

How to Use it:

To Dismiss a LATE CANCEL NOTICE do the following:

1. With the actions context menu for the LATE CANCEL NOTICE open, click **Dismiss**. You may also down arrow to **Dismiss** and press *(ENTER)*.

The LATE CANCEL NOTICE notification will be removed from the Notifications pane.

Mark as Unread - Late Cancel Notice

Description:

The Mark as Unread context menu action allows you to set the LATE CANCEL NOTICE notification inside of the Notifications pane back to an unread state. When you click on the LATE CANCEL NOTICE notification and/or access the context menu for the notification, it gets marked as read. The text of a read notification is no long bold and the number for that notification is removed from the Notification Bell Icon. Mark as Unread lets you set the text back to bold and restores the Notification Bell icon number.

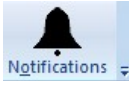
You do not need to be logged in to your Apex account to use the Mark as Unread context menu action.

How to Use it:

To use the Mark as Unread context menu action do the following:

1. With the actions context menu for the LATE CANCEL NOTICE open, click **Mark as Unread**. You may also down arrow to **Mark as Unread** and press *(ENTER)*.

Here is how the LATE CANCEL NOTICE notification and the Notifications Bell icon looked before Mark as Unread:



Here is how the LATE CANCEL NOTICE notification and the Notifications Bell icon looks after Mark as Unread:

Errors Reported In

Description:

After submitting files to an agency, the agency may report they found errors after reviewing the files or they may choose to send you a note regarding the files they received. When an agency creates an "error note" in Apex, you will receive an ERRORS REPORTED IN notification. The Notifications Bell icon in Case CATalyst will also reflect the existence of the notification. If there were no new/unread notifications, the Notifications Bell will show the number 1 after the ERRORS REPORTED IN notification is received.

You must be logged in to your Apex account to receive an ERRORS REPORTED IN notification.

How to Use it:

To view the actions context menu for the ERRORS REPORTED IN notification do the following:

1. In the Notifications pane, click the **down arrow** to the right of the ERRORS REPORTED IN notification to display the actions context menu for the notification. You may also press *ENTER* to open the actions context menu if the ERRORS REPORTED IN notification is already highlighted.

View Error Notes - Errors Reported In

Description:

The View Error Notes context menu action for an ERRORS REPORTED IN notification lets you see the "error note(s)" written by the agency for file(s) you submitted for the Apex Job. Selecting the View Error Notes context menu action for the ERRORS REPORTED IN notification will open the Error Notes dialog.

You do not need to be logged in to your Apex account to view the Error Notes dialog. You will need to be logged in to your Apex if you want to send a note back to the agency and/or upload additional files.

How to Use it:

To view the Error Notes dialog for the ERRORS REPORTED IN notification do the following:

1. With the actions context menu for the ERRORS REPORTED IN open, click **View Error Notes**. You may also down arrow to **View Error Notes** and press *(ENTER)*.

Error Notes

The Error Notes dialog shows each of the notes written by the agency and any notes you have sent to the agency regarding the files submitted for the Apex Job. The Error Notes dialog shows the following columns:

- **Date** - the Date column shows the date and time the note was created.
- **Email** - shows the email address of the Apex account that created the note.
- **Note** - displays the note text.

Sending a Note

You may send a note to the agency. To send a note, do the following:

1. Click inside of the empty *text field* area to position your cursor there for typing. You may also use the TAB key to tab into the *text field*.
2. Type your note.
3. Click Send (*Alt* + *s*).

If the *text field* area is empty when Send is selected, you will receive the message *"Unable to send empty Note."*

View Uploaded Files

You may view the files that have been uploaded for the Apex Job while in the Error Notes dialog. To open the Files Uploaded To Apex dialog do the following:

1. Click the View Uploaded Files button *(Alt + v)*.

The Files Uploaded To Apex dialog lets you view the files that have been uploaded for the Apex Job, upload additional files, and update the currently uploaded files.

Viewing:
The Files Uploaded To Apex dialog lists the currently uploaded files and provides the following information about those files:

- **File Name** - displays the name of the uploaded file.

- **File Type** - displays what type was selected for the file when it was uploaded. For example, if the file was uploaded as the Final Transcript, "Final" will display as the File Type.
- **File Size (KB)** - displays the file size of the uploaded file.
- **Page Count** - if applicable, displays the total number of pages that was given for the file at the time it was uploaded.

Modifying an Existing Upload and/or Uploading Additional Files

Let's say you have submitted the Final transcript to the agency, but the agency sent you a note requesting a change. After viewing the Error Note from the agency, you realize the agency does not have the correct transcript. You may use the Upload More option in the Files Uploaded to Apex dialog to upload the correct transcript. To access the Upload Files dialog, do the following:

1. Click the Upload More button (*Alt* + *U*).

When the Upload Files dialog displays take the appropriate actions for the file(s) you'd like to upload.

When you have finished with the Error Notes dialog, click Close (*Alt* + *c*) to close the Error Notes dialog.

Additional Information

When an error note is received on an Apex Job that was in a Submitted state, the Apex Job will be moved to a Concluded state. You may then find the job in the Concluded section of the Apex Job Assignments pane. The background color of the job will turn pink. After making any necessary corrections, use the All Files Submitted action for the Apex Job to set the job back to a Submitted state.

You must be logged in to your Apex account to do the following from within the Error Notes dialog:

- Send a note.
- View Uploaded Files

Dismiss - Errors Reported In

Description:

The Dismiss context menu action allows you to remove the ERRORS REPORTED IN notification from the Notifications pane.

You do not need to be logged in to your Apex account to use the Dismiss context menu action.

How to Use it:

To Dismiss a ERRORS REPORTED IN do the following:

1. With the actions context menu for the ERRORS REPORTED IN open, click **Dismiss**. You may also down arrow to **Dismiss** and press *(ENTER)*.

The ERRORS REPORTED IN notification will be removed from the Notifications pane.

Mark as Unread - Errors Reported In

Description:

The Mark as Unread context menu action allows you to set the ERRORS REPORTED IN notification inside of the Notifications pane back to an unread state. When you click on the ERRORS REPORTED IN notification and/or access the context menu for the notification, it gets marked as read. The text of a read notification is no long bold and the number for that notification is removed from the Notification Bell Icon. Mark as Unread lets you set the text back to bold and restores the Notification Bell icon number.

You do not need to be logged in to your Apex account to use the Mark as Unread context menu action.

How to Use it:

To use the Mark as Unread context menu action do the following:

1. With the actions context menu for the ERRORS REPORTED IN open, click **Mark as Unread**. You may also down arrow to **Mark as Unread** and press *(ENTER)*.

Here is how the ERRORS REPORTED IN notification and the Notifications Bell icon looked before Mark as Unread:

Here is how the ERRORS REPORTED IN notification and the Notifications Bell icon looks after Mark as Unread: