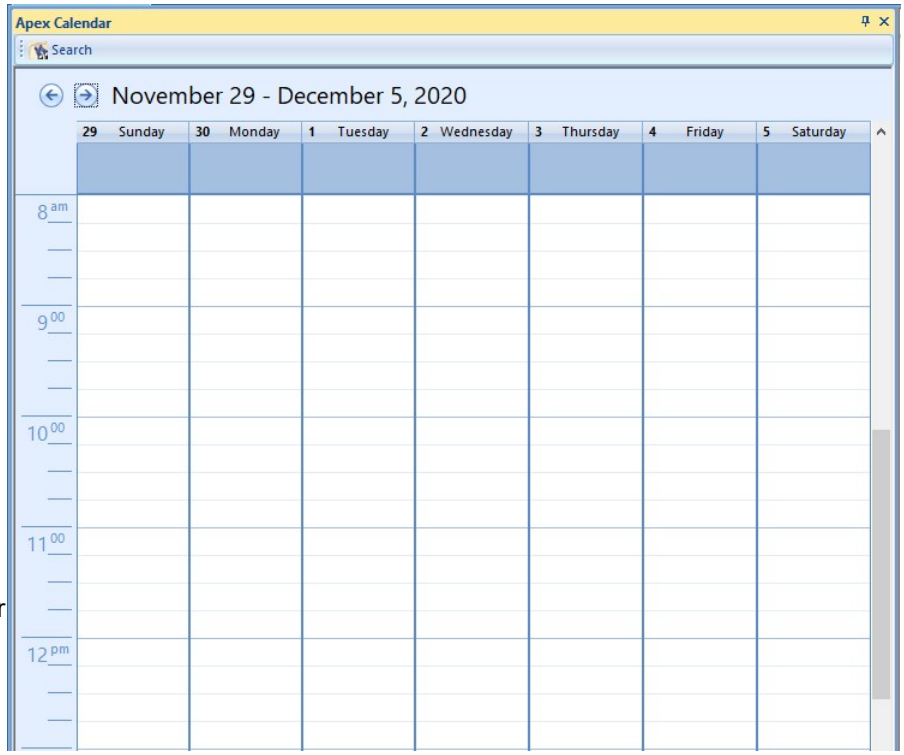
Apex Calendar

Description:

The Apex Calendar pane provides a convenient method for visualizing your Apex Jobs by date and time, searching for past and future Apex Jobs, and communicating your availability to In-Network and Out-of-Network agencies. The Apex Calendar pane allows you to act on Apex Jobs in similar ways to the Job Assignments and Notifications panes.



How to Use It:

To open the Apex Calendar Pane do the following:

1. From Manage Jobs, click **Apex**, **Calendar** *(Alt + a, c)*.

Date and Time Display:

The Apex Calendar pane defaults to showing the current week starting with Sunday.

Columns

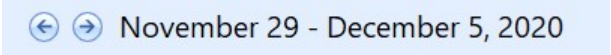
The columns of the Apex Calendar are the days of the week.

Rows

The Apex Calendar rows are the time of day in 15 minute increments. The Apex Calendar pane defaults to 8 am at the top of the pane. Depending on the size and position you set for the Apex Calendar pane, you may need to use the vertical scroll bar to see a specific time of day.

Changing the Week Displayed:

The week being displayed by the Apex Calendar pane is shown at the top of the pane.



To advance forward in the calendar you may do the following:

- Click the **Right Arrow** icon once for each week you want to move forward. The Apex Calendar pane will move in increments of one week at a time, keeping Sunday as the first column displayed.

- Press the *[Right Arrow]* on your keyboard to move forward by one day at a time. The Apex Calendar will move in increments of one day. The date range displayed at the top of the Apex Calendar pane will update to show the date range you are currently viewing.

To move backward in the calendar you may do the following:

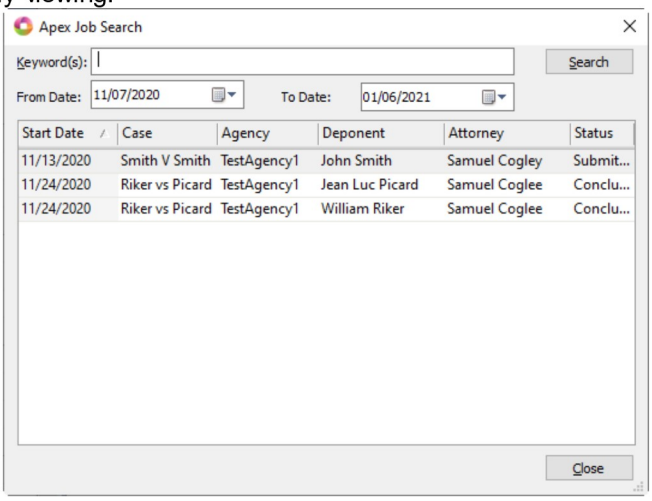
- Click the **Left Arrow** icon once for each week you want to move backward. The Apex Calendar pane will move in increments of one week at a time, keeping Sunday as the first column displayed.
- Press the *[Left Arrow]* on your keyboard to move backward by one day at a time. The Apex Calendar will move in increments of one day. The date range displayed at the top of the Apex Calendar pane will update to show the date range you are currently viewing.

Search:

The Apex Calendar provides a Search feature for quickly viewing past and future Apex Jobs. To perform a search within the Apex Calendar pane do the following:

1. Click **Search** *(Ctrl + f)* Search

The Apex Job Search dialog allows you to search for Apex Jobs by Keyword(s) and date range.



Additional Information:

The Apex Calendar pane opens docked to the bottom of the Manage Jobs screen by default. Like other panes in Case CATalyst, the Apex Calendar pane can be docked to other screen edges, resized, floated, pinned, hidden and docked to other panes.

You do not need to be logged in to Apex to view the Apex Calendar pane. However, some functionality will require you to be logged in to Apex.

Set Availability - Apex Calendar

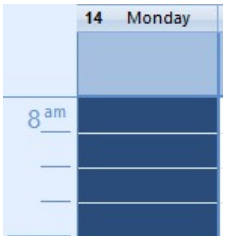
Description:

The Apex Calendar pane let's you notify your "In-Network" Apex Agencies when there are specific days and times that you are not available to take an Apex Job. Conversely, there is also a method of letting "Out-of-Network" Apex Agencies know when there are specific days and times that you are available to take an Apex Job.

In other words, if you mark a block of time as "Unavailable" in the Apex Calendar pane, you will not appear as a candidate for any Apex Job an Apex Agency is trying to schedule for that time. If you mark a block of time as "Available to Out of Network Agencies, you will appear as a candidate for any Apex Job an "Out-of-Network" agency is trying to schedule for that time.

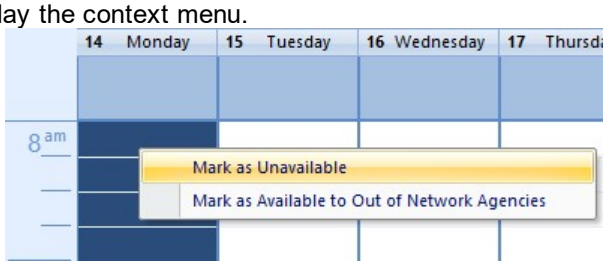
How to Use It:

Mark as Unavailable:

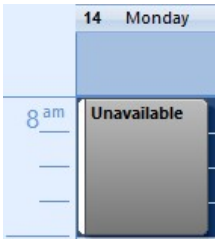


Let's say you will not be available to take an Apex Job on an upcoming Monday between 8 am and 9 am. Therefore, you do not want to receive an Apex Job Proposals for that day if the job time intersects with the time you are not available. You can mark you Apex Calendar as unavailable for that range of time to ensure that an Apex Agency will not send you an Apex Job Proposal.
To mark yourself as unavailable, do the following:

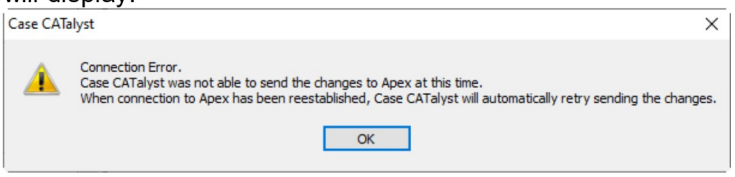
1. In the Apex Calendar pane move to the day of the week you'd like to mark as unavailable.
2. You may highlight range of time you want to set as unavailable with the mouse or keyboard:
   a. Mouse - Click and then drag the mouse pointer over each time cell you want highlight. Each cell is a 15 minute increment of time.
   b. Keyboard - Use the *arrow keys* to position the cursor into the first cell you want to mark, then hold down *[Shift]* while using the *arrow keys* to highlight the remaining cells. Each cell is a 15 minute increment of time.
   c. Keyboard and Mouse - Click in the first cell you want to highlight, then hold down *[Shift]* and click on the last cell of the range you want to highlight. Each cell highlighted is a 15 minute increment of time.
3. Right Click on one of the highlighted cells to display the context menu.
4. Click **Mark as Unavailable**, or press *[ENTER]*.



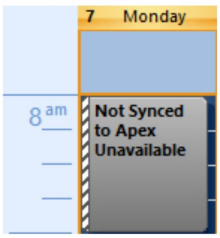
If you are logged in to Apex, the range of time highlighted will now appear as a block of "Unavailable" time.



If you are not logged in to Apex, or there is some service interruption, a connection error message box will display.

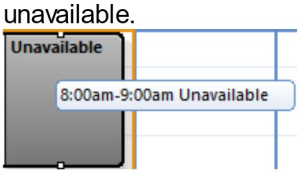


After clicking **OK** the highlighted block of "Unavailable" time will show the message *Not Synced to Apex Unavailable*.



The next time you are logged in to Apex, the unavailable time will be sent to Apex and the block of "Unavailable" time will update to say *Unavailable.*

You may further verify the amount of time marked as unavailable by hovering your mouse pointer over the block of unavailable time. A pop up message will display showing the range of time marked as unavailable.



Modifying the amount of time for an "Unavailable" time block:

You can modify the time marked as unavailable without needing to remove the existing block of time marked as unavailable. You must be logged in to Apex to modify an "Unavailable" time block.

To add or remove time from the current unavailable time block, do the following:

1. Click on the Unavailable block to select it. Two dots will appear; one dot at the top of the block and one dot at the bottom of the block.
2. Use the appropriate dot to increase or decrease the amount of time marked as unavailable.
   a. Click and drag on the bottom dot to change the end time of the unavailable block. The mouse pointer will change to an *up arrow and down arrow* styled pointer when you can drag. The time may be changed in 15 minute increments: upwards to make the end time for the block an earlier time and downwards to make end time for the block a later time.
   b. Click and drag on the top dot to change the start time of the unavailable block. The mouse pointer will change to an *up arrow and down arrow* styled pointer when you can drag. The time may be changed in 15 minute increments: upwards to make the start time for the block earlier and downwards to make the start time for the block later.

If the modification is not able to be sent to Apex, either because you are not logged in to Apex or there is some service interruption, the original time block will be restored. You may try again when you are connected to Apex.

Moving an "Unavailable" time block to a different time:

If you want to move an entire unavailable block of time to to have a different start and end time while keeping the amount of unavailable time the same, you can move the existing block without needing to remove it and create a new block. You must be logged in to Apex to move an "Unavailable" time block.

To move an existing time block to a new start and end time, do the following:

1. Click on the Unavailable block and drag it to the new start and end time position. You may move the block in increments of 15 minutes. You may also move the block to a different day.

If the modification is not able to be sent to Apex, either because you are not logged in to Apex or there is some service interruption, the original time block location will be restored. You may try again when you are connected to Apex.

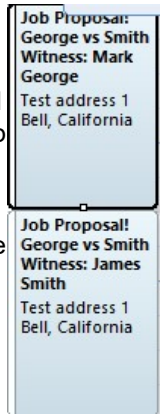
Additional Information:

Changes made in Case CATalyst to the Apex Calendar pane will also be reflected in the Calendar view when viewing your Apex account using the Apex website. Likewise, changes you make to your calendar on the Apex website will be reflected in the Case CATalyst Apex Calendar pane when logged in to your Apex account in Case CATalyst.

Job Proposal - Apex Calendar

Description:

When an Apex Agency invites you to take a new Apex Job, you will receive a Job Proposal entry in the Apex Calendar pane. This accompanies the NEW JOB PROPOSAL in the Notifications pane inside of Case CATalyst.



You may use the Job Proposal entry in the Apex Calendar pane to act on the Apex Job Proposal. You must be logged in to your Apex account to receive a Job Proposal notification in the Apex Calendar pane. 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 Job Proposal entry in the Apex Calendar pane the next time you are logged in to your Apex account.

Each witness of an Apex Job Proposal will appear in the Apex Calendar pane as a separate entry. The entries will be visible in the date and time location of the Apex Calendar pane that matches the start date and time for each witness of the Apex Job Proposal. The area in the Apex Calendar marked by each witness of the Job Proposal entry will match the scheduled start and end time length for each witness.

How to Use it:

To act on a Job Proposal entry in the Apex Calendar pane, do the following:

1. Inside of the Apex Calendar pane, right click on the Job Proposal entry. If there are multiple witnesses for the Job Proposal entry, it does not matter which Job Proposal entry witness is right clicked. The context menu will display for the Job Proposal.
2. Select one of the following depending on the action you'd like to take:
   a. View Details - lets you see extensive details about the Apex Job Proposal.
   b. Accept Job - lets you accept the Apex Job Proposal.
   c. Reject Job - lets you reject the Apex Job Proposal.

Additional Information:

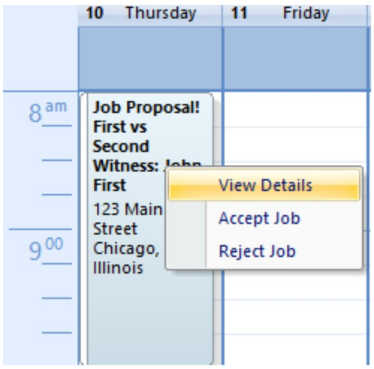
You must be logged in to Apex to receive a new Job Proposal entry in the Apex Calendar pane. You must also be logged in to Apex to complete the Accept Job and Reject Job context menu actions for a Job Proposal entry.

Apex Agencies create a Job Proposal Expiration Date for each Apex Job Proposal sent. When the Job Proposal Expiration Date has passed for a Job Proposal entry in the Apex Calendar pane, the Job Proposal entry will automatically be removed by Case CATalyst.

View Details

Description:

You may want to use the View Details context menu action before using the Accept Job or Reject Job context menu actions for a Job Proposal entry in the Apex Calendar pane. The View Details context menu action lets you see extensive details about the Job Proposal. More than is displayed by the Job Proposal entry in the Apex Calendar pane alone. Selecting the View Details context menu action for the Job Proposal entry will open the Apex Job Details dialog.



How to Use it:

To view the Apex Job Details dialog for a Job Proposal entry, do the following:

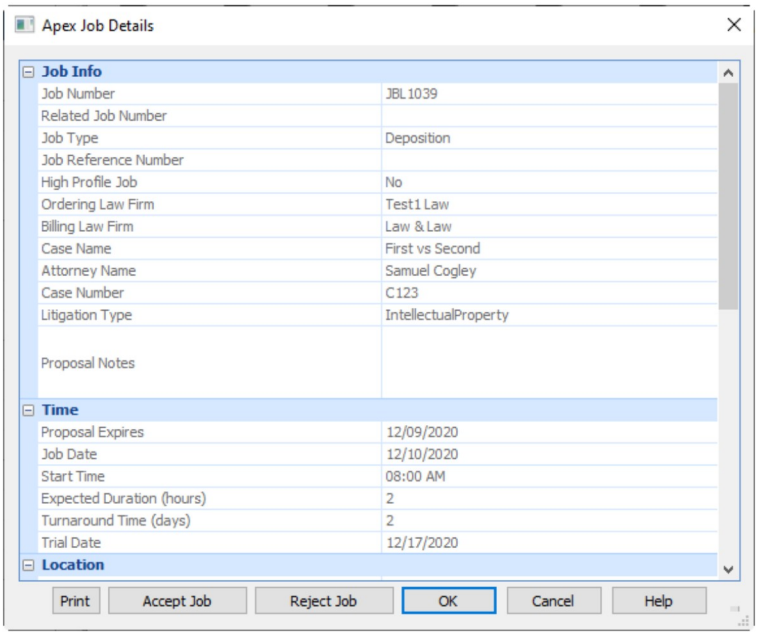
1. Inside of the Apex Calendar pane, right click on the Job Proposal entry. If there are multiple witnesses for the Job Proposal entry, it does not matter which Job Proposal entry witness is right clicked. The context menu will display for the Job Proposal.
2. Click **View Details**. Alternatively, you may use the *Up* and *Down* arrow keys to highlight **View Details** then press *[ENTER]*.

Apex Job Details

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

Job Info: - Provides expanded information about the Apex Job beyond what is displayed by the Job Proposal entry in the Apex Calendar pane.

- 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 Job

Description:

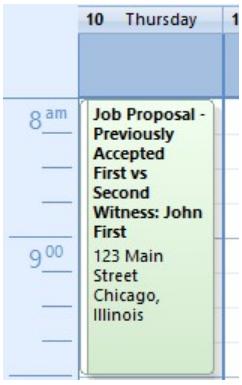
The Accept Job context menu action allows you to accept the Apex Job proposal from within the Apex Calendar pane. When you accept an Apex Job proposal, you are letting the Apex Agency know that you are able to work the Apex Job. However, that does not mean you have been given the Apex Job. The Apex Agency must confirm your acceptance of the Apex Job. When you use the Accept Job action on a Job Proposal entry in the Apex Calendar pane, the Apex Calendar will update to reflect that the Job Proposal entry is now a "Previously Accepted" Job Proposal entry. The Notifications pane will also update to display a notification for an accepted Apex Job Proposal.

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 using the Accept Job action on a Job Proposal entry in the Apex Calendar pane, do the following:

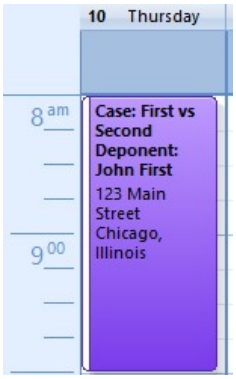
1. Inside of the Apex Calendar pane, right click on the Job Proposal entry. If there are multiple witnesses for the Job Proposal entry, it does not matter which Job Proposal entry witness is right clicked. The context menu will display for the Job Proposal.
2. Click **Accept Job**. Alternatively, you may use the *Up* and *Down* arrow keys to highlight **Accept Job** then press *[ENTER]*.



A Job Proposal - Previously Accepted entry will replace the Job Proposal entry in the Apex Calendar pane. This 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.

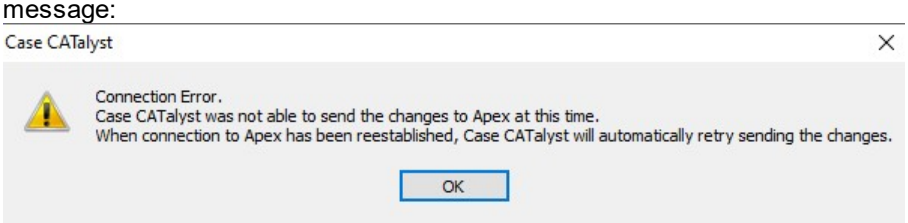
The Job Proposal - Previously Accepted entry has the same context menu actions as the Job Proposal entry. This means you may still choose Reject Job on the Job Proposal - Previously Accepted entry.

Once the Apex Agency has confirmed your acceptance of the Apex Job proposal, the Job Proposal - Previously Accepted entry notification will be replaced by a Case: entry in the Apex Calendar pane.



Additional Information:

If you are not logged in to Apex or there is some service interruption when attempting to use the Accept Job action on a Job Proposal in the Apex Calendar pane, 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.

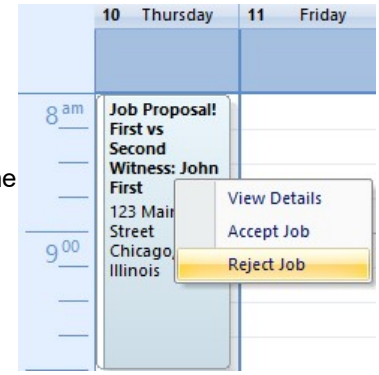
Reject Job

Description:

The Reject Job context menu action allows you to reject the Apex Job proposal from within the Apex Calendar pane. When you reject an Apex Job proposal, you are letting the Apex Agency know that you are not able to work the Apex Job. When you use the Reject Job action on a Job Proposal entry in the Apex Calendar pane, the Apex Calendar will update to reflect that the Job Proposal entry is now a "Previously Rejected" Job Proposal entry. The Notifications pane will also update to display a notification for a Rejected Apex Job Proposal.

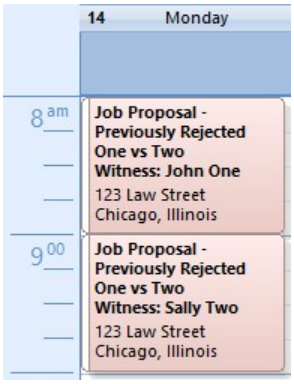
You must be logged in to your Apex account for the Apex Agency to be notified that you accepted an Apex Job proposal.

How to Use it:



To accept an Apex Job Proposal using the Reject Job action on a Job Proposal entry in the Apex Calendar pane, do the following:

1. Inside of the Apex Calendar pane, right click on the Job Proposal entry. If there are multiple witnesses for the Job Proposal entry, it does not matter which Job Proposal entry witness is right clicked. The context menu will display for the Job Proposal.
2. Click **Reject Job**. Alternatively, you may use the *Down* arrow key to highlight **Reject Job** then press *[ENTER]*.

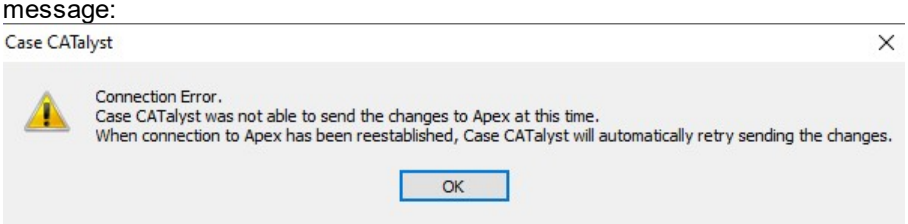


A Job Proposal - Previously Rejected entry will replace the Job Proposal entry in the Apex Calendar pane. This indicates your rejection of the Apex Job has been sent to the Apex Agency.

The Job Proposal - Previously Rejected entry has View Details and Accept Job context menu actions. This means you may still choose to accept the Apex Job Proposal.

Additional Information:

If you are not logged in to Apex or there is some service interruption when attempting to use the Reject Job action on a Job Proposal in the Apex Calendar pane, 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.

Assigned Job - Apex Calendar

Description:

Apex Jobs you have accepted and been assigned, appear as "Case:" entries in the Apex Calendar pane. Each witness of a Case: entry appear as a separate entry in the Apex Calendar pane.

A Case: entry in the Apex Calendar pane will have the following context menu selection items:

- View Details
- Find Transcript
- Start Translation
- Conclude Job
- Decline Job

How to Use it:

To act on a Case: entry in the Apex Calendar pane, do the following:

1. Inside of the Apex Calendar pane, right click on the Case: entry. The context menu will display for the Case: entry. If there are multiple witness for the Apex Job, the Find Transcript and Start Translation context menu actions apply specifically to the selected witness of the Apex Job.
2. Select one of the following depending on the action you'd like to take:
   a. View Details - lets you see extensive details about the Assigned Apex Job.
   b. Find Transcript - lets you quickly change your Case CATalyst Manage Jobs screen location to show the location of the Case CATalyst transcript associated to the witness of the Apex Job.
   c. Start Translation - lets you associate a transcript to the witness of an Apex Job at the time of transcript creation.
   d. Conclude Job - lets you set an Apex Job to a concluded state when the transcripts for each witness of the Apex Job have been created.
   e. Decline Job - lets you tell an Apex Agency that you won't be able to take an Assigned Apex Job.

Additional Information:

You must be logged in to Apex to complete the Conclude Job and Decline Job context menu actions for a Case: entry in the Apex Calendar pane.

View Details

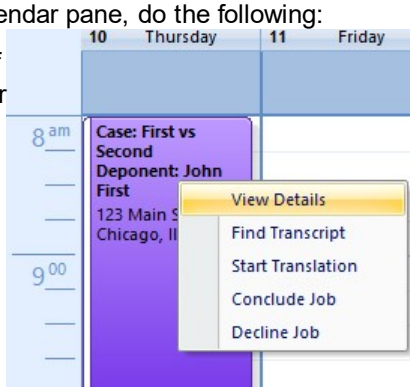
Description:

The View Details context menu action lets you see extensive details about a Case: entry in the Apex Calendar pane. Selecting the View Details context menu option for any of the witnesses of a Case: entry will open the Apex Job Details dialog for the Apex Job.

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 in the Apex Job Details dialog to the Apex Agency.

How to Use it:

To view the Apex Job Details dialog for a Case: entry in the Apex Calendar pane, do the following:



1. Inside of the Apex Calendar pane, right click on the Case: entry. If there are multiple witnesses for the Case: entry, it does not matter which Case: entry witness is right clicked. The context menu will display for the Apex Job.
2. Click **View Details**. Alternatively, you may use the *Up* and *Down* arrow keys to highlight **View Details** then 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.

- Attorney Name
- Litigation Type

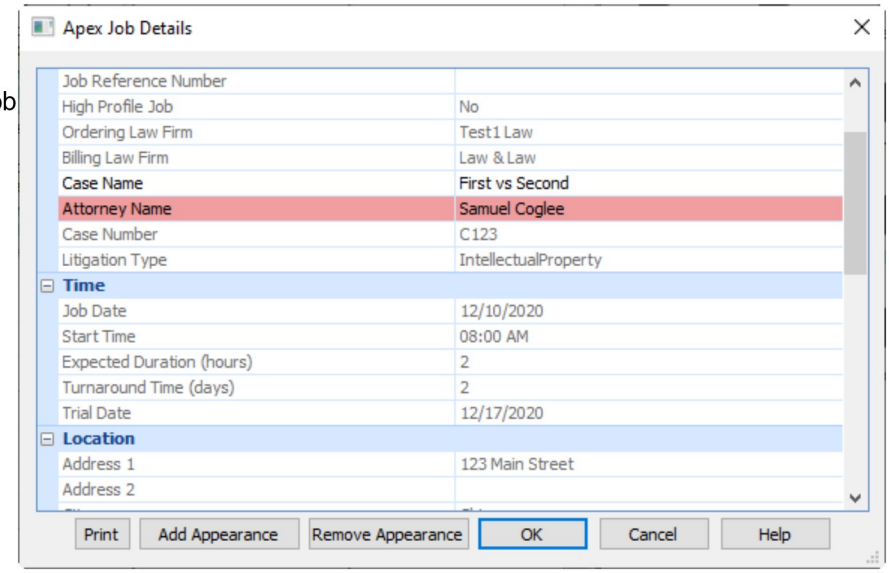
Time: - Provides expanded information about the Apex Job times.

- 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
- Appearance persons for each witness
- Services ordered



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.

Add Appearance

From within the Apex Job Details dialog, you may add appearances for each witness of the Apex Job. The appearances will then be listed under the appropriate witness in the Apex Job Details dialog as well as be listed on the Worksheet for the job. You must be logged in to Apex to add appearances. To add appearances, do the following:

1. Click the Add Appearances button or [TAB] to the Add Appearances button and press [ENTER].

When the Add Appearance dialog displays, do the following:

1. If the Apex Job has more than one witness, use the Witness: drop down menu to select the appropriate witness for the new appearance person.
   a. Click the drop-down arrow for the Witness: field to expand the Witness: field menu.
   b. Click the appropriate witness.
2. In the E-mail: field, specify the email address of the appearance person.
3. Click Next > (*Alt* + *n*), to move to the Add Appearance - Personal Information dialog.

If there is an Apex account associated to the email address of the appearance person, the Add Appearance - Personal Information dialog will already have populated details for the appearance person. If needed, do the following to fill in the Personal Information for the appearance person:

1. Click inside of the Title: field (*Alt* + *t*), to type in the title of the appearance person. (*Optional*)
2. Click inside of the First name: field (*Alt* + *f*), to type in the first name of the appearance person.
3. Click inside of the Last name: field (*Alt* + *l*), to type in the last name of the appearance person.
4. Click inside of the Phone #: field (*Alt* + *p*), to type in the phone number of the appearance person. (*Optional*)
5. Click Next > (*Alt* + *n*), to move to the Add Appearance - Company Information dialog.

If there is an Apex account associated to the email address of the appearance person, the Add Appearance - Company Information dialog will already have populated details for the appearance person. If needed, do the following to fill in the Company Information for the appearance person:

1. Click inside of the Company Name: field, to type in the company name of the appearance person.
2. Click inside of the Company Phone: field, to type in the company phone number of the appearance person.
3. Click inside of the Billing Address: fields or [TAB] to each field, to type the address information of the appearance person.
4. Click Next > (*Alt* + *n*), to add the appearance person to the witness.
5. Click Finish [ENTER] after receiving confirmation the appearance person was added successfully.

The new appearance person will now be listed in the **Appearance Information** under the appropriate witness in the Apex Job Details dialog.

Remove Appearance

If it should become necessary to remove an appearance for one or more witnesses of an Apex Job, do the following:

1. In the Apex Job Details dialog, click anywhere inside of the fields listed for the Appearance Information section of the appearance person you'd like to remove from the Apex Job.
2. Click the Remove Appearance button or [TAB] to the Remove Appearance button and press [ENTER].
3. When the "Are you sure you want to remove" dialog appears, do one of the following:
   a. To remove the appearance person, click Yes or press [ENTER].
   b. To not remove the appearance person, click No or press [ESC].

Removing an appearance from the Apex Job will remove the appearance from the Apex Job Details and from the Job Worksheet. You must be logged in to Apex to remove an appearance.

View Worksheet

The View Worksheet button lets you create a PDF copy of the job worksheet. The information contained within the Apex Job Detail dialog is used to build the PDF. Case CATalyst provides to default files that are used to create the Job Worksheet:

- ApexJobInfoTemplate.sgngl
- ApexWitnessAppearanceTemplate.sgngl

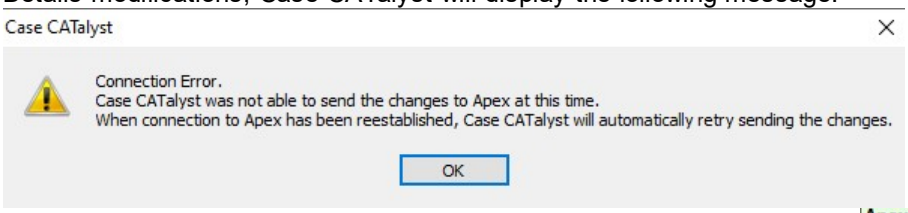
Both files are located in the Apex Worksheet Tempates case inside of the System Files case. While you may open and modify these files to fit your specific Job Worksheet format, do not rename or remove these files. Case CATalyst expects to find these files at the default location. If Case CATalyst cannot find the files, an error message will display after clicking the View Worksheet button.

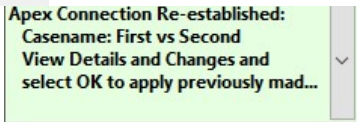
To create a Worksheet, do the following:

1. Click the **View Worksheet** button.
2. The worksheet will be built based on the Apex Fields and formatting of the Worksheet Template files and will open in your default PDF viewer.
3. You may name and save the Worksheet PDF file by using the "Save As" method of your PDF viewer.

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 in the Notifications pane the next time you log in to Apex or the service interruption has been resolved. You will not see a change to the Case: entry in the Apex Calendar pane.

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

1. Open the actions context menu for the Apex Connection Re-established notification or by selecting 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.

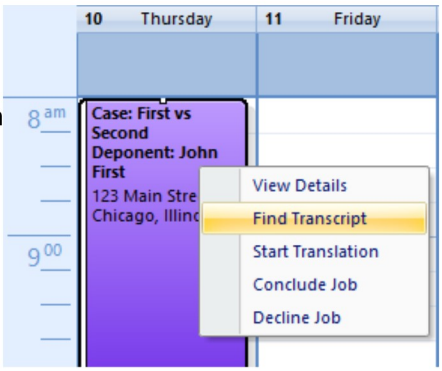
To close the Apex Job Details dialog without taking action, click **Cancel** *(ESC)*.

Find Transcript

Description:

The Find Transcript context menu option provides a method for moving your Case CATalyst Manage Jobs view to the location of a Case CATalyst transcript associated to the witness of the Case: entry in the Apex Calendar pane. For example, if the Case CATalyst transcript associated to the witness of the Apex Job is in a Case folder, and you are currently not inside that Case folder in Manage Jobs, selecting the Find Transcript option for the witness of the Case: entry will open the Case folder in Manage Jobs for you.

If the Apex Job witness does not have an associated Case CATalyst transcript, the Find Transcript dialog will open.



How to Use it:

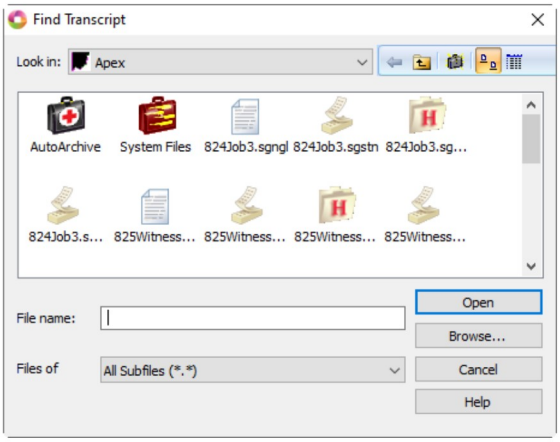
To use the Find Transcript context menu option for a Case: entry in the Apex Calendar pane, do the following:

1. Inside of the Apex Calendar pane, right click on the Case: entry. If there are multiple witnesses for the Case: entry, right click on the Case entry: for the witness you want to find the associated transcript.
2. Click **Find Transcript**. Alternatively, you may use the *Up* and *Down* arrow keys to highlight **Find Transcript** then press *[ENTER]*.

One of the following will happen:

A. If the witness of the Apex Job has an associated Case CATalyst transcript, your Manage Jobs screen view will change so that the transcript is within view. If the transcript is inside of a Case folder that is not currently open, the Case folder will be opened automatically.

B. If the witness of the Apex Job does not have an associated Case CATalyst transcript, the Find Transcript dialog will appear. You may use the Find Transcript dialog to locate the Case CATalyst transcript. To use the Find Transcript dialog, type the file name you are looking for in the File name: field and then click **Open** *[ENTER]*.



Additional Information:

You do not need to be logged in to Apex to use the Find Transcript option. To learn more about the Find Transcript dialog, search for "Find Transcript" in Case CATalyst Help *(F1)*.