

Apex Job Actions

Description:

The Job Actions menu under the Apex heading gives you the ability to take Apex actions on an existing Case CATalyst transcript. For example, you may have an existing Case CATalyst transcript that you want to associate to an Apex Job. You can use the Job Actions menu to accomplish the association. As another example, you may have a Case CATalyst transcript that is already associated to an Apex Job that you want to see the Apex Job Details for the Apex Job associated to that Case CATalyst transcript. Instead of finding the Apex Job in the Job Assignments pane, you can use the Job Actions menu to "View Details" for the Apex Job associated to the Case CATalyst transcript.

The active actions available in the Job Actions menu will change based on the current state of the selected Case CATalyst transcript. The actions available are:

- Associate Apex Job...
- Conclude Job
- Upload File...
- All Files Submitted
- View Details...

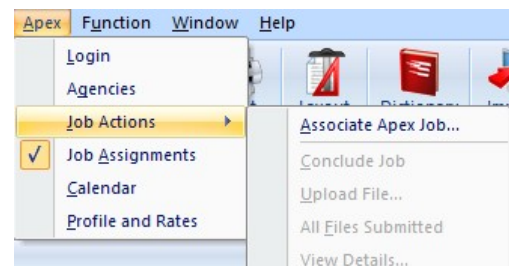
How to Use it:

The Job Actions menu is available under the Apex heading in the Manage Jobs screen in Case CATalyst. The Job Actions menu functionality is also available in the right click context menu when you perform a right click action on a Case CATalyst transcript.

To access the Job Actions menu actions do one of the following:

Using the Apex Heading Menu:

1. From Manage Jobs, with the Case CATalyst transcript you want to take action on selected, click **Apex, Job Actions** (*Alt + a, j*).

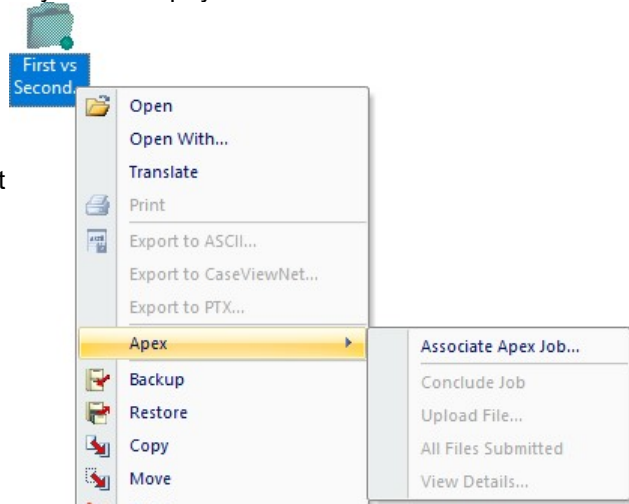


The active actions available on the Job Actions menu change based on the current state of the Case CATalyst transcript and its associated Apex Job.

Using the right click context menu of the Case CATalyst transcript:

1. From Manage Jobs, right click on the Case CATalyst transcript you want to take action on.
2. Inside of the right click context menu for the Case CATalyst transcript, hover the mouse pointer on the **Apex** menu to show the sub menu actions.

The actions listed as a sub menu of the Apex right click menu choice mirror the same actions available in the Job Actions menu. The active actions available on the Apex right click menu choice sub menu change based on the current state of the Case CATalyst transcript and its associated Apex Job.



Additional Information:

You do not need to be logged in to your Apex account to use the following Job Actions:

- Associate Apex Job...
- View Details...

You need to be logged in to your Apex account to use the following Job Actions:

- Conclude Job
- Upload File...
- All Files Submitted

Associate Apex Job...

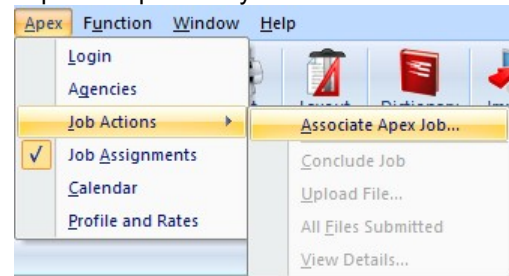
Description:

Although the Start Translation option in the Job Assignments pane and the Apex Calendar pane allow you to associate a Case CATalyst transcript with an Apex Job at the time of translation, you may have an existing Case CATalyst transcript that you'd like to associate to an Apex Job. The Associate Apex Job... action lets you do that.

You may also use the Associate Apex Job... action when you want to change the Apex Job a Case CATalyst transcript is currently associated. For example, the incorrect witness of an Apex Job may have been selected when using the Start Translation Job Assignments pane option, or was accidentally selected when associating the Case CATalyst transcript to an Apex Job previously.

Associating a Case CATalyst transcript to an Apex Job witness has the advantage of making the Apex Job Details available to the Case CATalyst transcript. The Apex Job Details are usable in the Case CATalyst transcript as Fill-in-Fields information. You may view the Fields available in the Case CATalyst transcript by clicking, **Edit, Insert, Field...** (*Alt + e, i, f*).

Note: Each witness of an Apex Job can have only one Case CATalyst transcript association

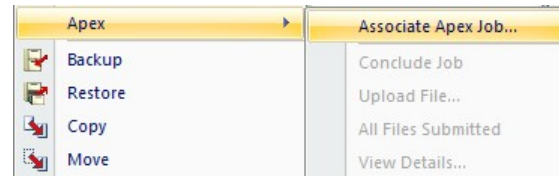


How to Use it:

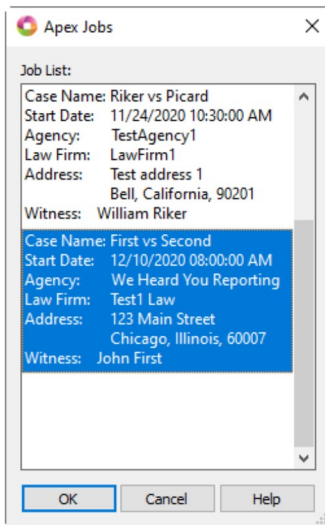
To select the Associate Apex Job... action for a Case CATalyst transcript, you may use the Apex, Job Actions menu or the right click context Apex menu for the Case CATalyst transcript.

1. Do one of the following:

- With the Case CATalyst transcript selected in Manage Jobs, click **Apex, Job Actions, Associate Apex Job...** (*Alt + a, j, a*)
- Right click on the Case CATalyst transcript in Manage Jobs, and then click **Apex Associate Apex Job...**



- Selecting Associate Apex Job... will open the Apex Jobs dialog. The Apex Jobs dialog lets you pick the witness of the Apex Job you'd like to associate the existing Case CATalyst transcript. All witnesses of Assigned and Concluded Apex Jobs will appear inside of the Apex Jobs dialog. Do the following inside of the Apex Jobs dialog:
 - Click on the appropriate witness of the Apex Job you'd like to associate to the Case CATalyst Transcript.
 - Click **OK**.



Apex Icon for Case CATalyst Transcripts with Associated Apex Jobs:

When a Case CATalyst transcript has an associated Apex Job, the icon for that Case CATalyst transcript in Manage Jobs shows there is an association. A circle with an 'A' character inside of it will show on the bottom left corner of the "folder" icon for the Case CATalyst transcript in Manage Jobs. This serves as a visual indication that the Case CATalyst transcript has an Apex Job association.

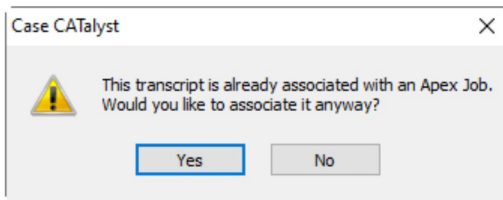


Changing the Apex Job Association for a Case CATalyst Transcript:

You may have need to change the current Apex Job association of a Case CATalyst Transcript. For example, you may have associated the Case CATalyst transcript to the incorrect witness of the Apex Job. To change the Apex Job association do the following:

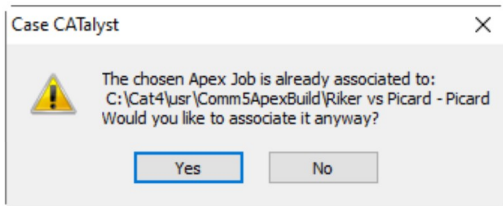
To select the Associate Apex Job... action for the Case CATalyst transcript you want to change the current Apex Job association, you may use the Apex, Job Actions menu or the right click context Apex menu for the Case CATalyst transcript.

1. Do one of the following:
 - a. With the Case CATalyst transcript selected in Manage Jobs, click **Apex, Job Actions, Associate Apex Job...** (*Alt + a, j, a*)
 - a. Right click on the Case CATalyst transcript in Manage Jobs, and then click **Apex Associate Apex Job...**
2. Because the Case CATalyst transcript is already associated to an Apex Job, the *This transcript is already associated with an Apex Job. Would you like to associate it anyway?* warning message box will appear. To associate the Case CATalyst transcript with a different Apex Job or Apex Job witness, click **Yes [ENTER]**.



3. The Apex Jobs dialog will appear. The Apex Jobs dialog lets you pick the witness of the Apex Job you'd like to associate the existing Case CATalyst transcript. All witnesses of Assigned and Concluded Apex Jobs will appear inside of the Apex Jobs dialog including the witness of the Apex Job the Case CATalyst transcript is current associated. Inside of the Apex Jobs dialog, select the witness of the Apex Job you'd like to now associate to Case CATalyst transcript and click **OK**.

If the witness of the Apex Job selected already has an existing Case CATalyst transcript association a *The chosen Apex Job is already associated to:* warning message box will display. If you want to replace the existing Case CATalyst transcript association for the witness of the selected Apex Job with the current Case CATalyst transcript, click **Yes [ENTER]**. If you do not want to replace the existing association, click **No [ESC]**.



When you select Yes to change the current Apex Job association, the currently selected Case CATalyst transcript becomes associated to the witness of the selected Apex Job and the previous Case CATalyst transcript will no longer be associated to an Apex Job.

Additional Information:

You do not need to be logged in to your Apex account to use the Associate Apex Job... action.

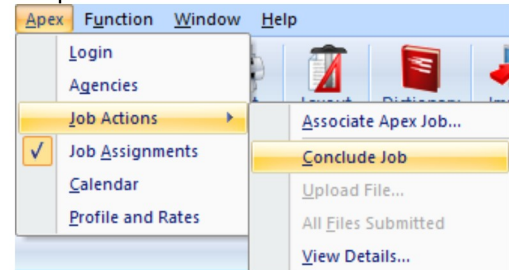
Conclude Job

Description:

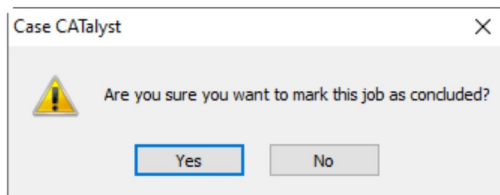
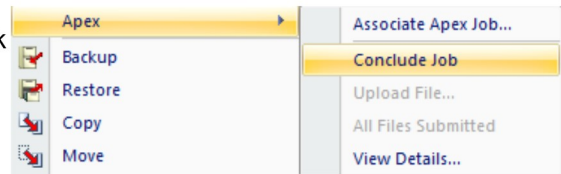
The Conclude Job option available on the Job Actions menu or the CATalyst Transcript right click context menu, provides a method for setting a Apex Job to a concluded state. Just like when using the Job Assignments pane, you will set an Apex Job to [Concluded](#) when you have created a transcript for each witness of the Apex Job. Using the Case CATalyst transcript associated to a witness of an Apex Job to set the Apex Job to a concluded state will set all witness of the Apex Job to a concluded state.

How to Use it:

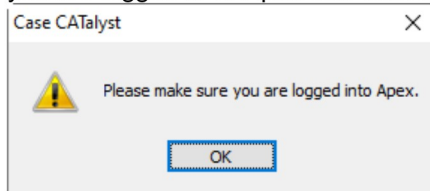
To select the Conclude Job action for a Case CATalyst transcript associated to a witness of the Apex Job you want to set to a concluded state, you may use the Apex, Job Actions menu or the right click context Apex menu for the Case CATalyst transcript.



1. Do one of the following:
 - a. With the Case CATalyst transcript selected in Manage Jobs, click **Apex, Job Actions, Conclude Job** (*Alt + a, j, c*)
 - a. Right click on the Case CATalyst transcript in Manage Jobs, and then click **Apex, Conclude Job**.
2. When the *Are you sure you want to mark the job as concluded?* message appears, do one of the following:
 - a. If you are sure you want to conclude the job, click **Yes** [*ENTER*].
 - b. If you don't want to conclude the job, click **No** [*ESC*].



If you are not logged in to Apex or there is some service interruption when attempting to conclude the Apex Job, Case CATalyst will display the *Please make sure you are logged into Apex* message. Verify you are logged in to Apex and then try again.



Additional Information:

You must be logged in to your Apex account to set an Apex Job to a concluded state.

Upload File...

Description:

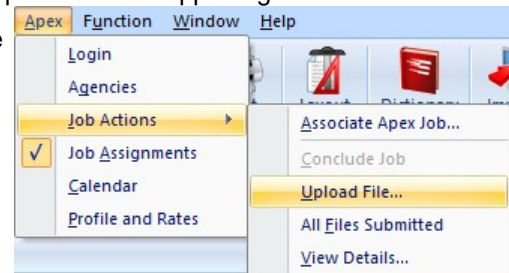
The Upload File... option available on the Job Actions menu or the CATalyst Transcript right click context menu, provides a method for opening the Upload Files dialog for the witness of the Apex Job associated to the Case CATalyst transcript. The Upload Files dialog provides a method for uploading the transcript and other supporting files for the Apex Job witness of the Concluded Apex Job associated to the Case CATalyst transcript. You may need to use the Upload Files option multiple times during the course of your transcript production for the Apex Job. For example, you may need to upload a rough draft of a transcript, and exhibit files, then later upload the final transcript and other supporting files.

While you do not need to be logged in to Apex to access the Upload File dialog, you do need to be logged in to Apex to complete the Upload File process.

How to Use it:

To select the Upload File... action for a Case CATalyst transcript associated to a witness of an Apex Job, you may use the Apex, Job Actions menu or the right click context Apex menu for the Case CATalyst transcript.



1. Do one of the following:
 - a. With the Case CATalyst transcript selected in Manage Jobs, click **Apex, Job Actions, Upload File...** (*Alt + a, j, u*)
 - a. Right click on the Case CATalyst transcript in Manage Jobs, and then click **Apex, Upload File...**

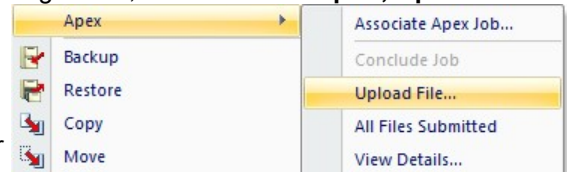


Upload Files Dialog:

The Upload Files dialog provides an interface for uploading the rough transcript, final transcript, and other files for each witness of an Apex Job. The Upload Files dialog has 3 main sections:

- Rough Transcript
- Final Transcript
- Other File

The options for each of the sections can be collapsed and expanded by clicking the  (*minus*) and  (*plus*) icons respectively.



Upload Files

Rough Transcript

File	
Number of Pages	0
Allow access to ordering Law Firm lawyers	No

Final Transcript

File	
Number of Pages	0
Allow Production to modify:	
Title page	No
Header/Footer	No
Body	No
Page layout/format	No
Index page	No
Exhibit Index	No
Appearance page	No

Buttons: Add Other File, OK, Cancel, Help

Rough Transcript

To upload a rough transcript for an Apex Job witness do the following:

1. Inside the Rough Transcript section of the Upload Files dialog, click on the File field. You may also use *[TAB]* and *Arrow Keys* to position your cursor in the File field.

2. Do one of the following:

- a. If the Apex Job witness has an associated Case CATalyst transcript with an ASCII or PDF file, a drop down icon will appear to the right of the browse button icon. You may use the drop down icon to select the rough transcript. Click the drop down icon and then click the available Case CATalyst ASCII or PDF rough transcript.
- b. If the Apex Job witness does not have an associated Case CATalyst transcript with and ASCII or PDF file, click the browse button icon. You may then browse to the transcript you'd like to upload as the rough transcript.

Rough Transcript

File	C:\Cat4\usr\Comm5ApexBuild\Riker vs Picard - Picard.pdf
Number of Pages	
Allow access to ordering Law Firm	C:\Cat4\usr\Comm5ApexBuild\Riker vs Picard - Picard.txt

3. If needed, modify the Number of Pages field for the rough transcript. Click on the Number of Pages field and type the number of pages for the transcript. For ASCII and PDF files, Case CATalyst will automatically populate the Number of Pages field.

Rough Transcript

File	C:\Cat4\usr\Comm5ApexBuild\Riker vs Pi...
Number of Pages	76
Allow access to ordering Law Firm lawyers	No

4. Choose if the ordering law firm lawyers should be able to access a copy of the rough transcript. Do the following:

- a. Click in the Allow access to ordering Law Firm lawyers field.
- b. Click the drop down icon. Click **Yes** to allow rough transcript access, or click **No** to not allow rough transcript access.

Rough Transcript

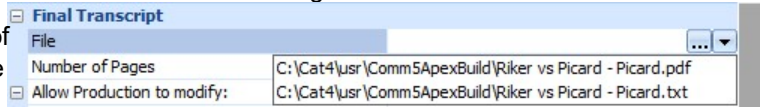


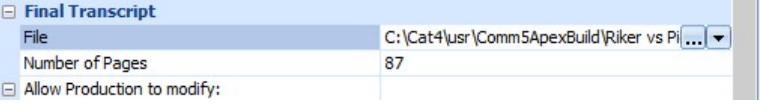

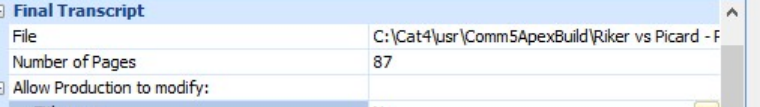

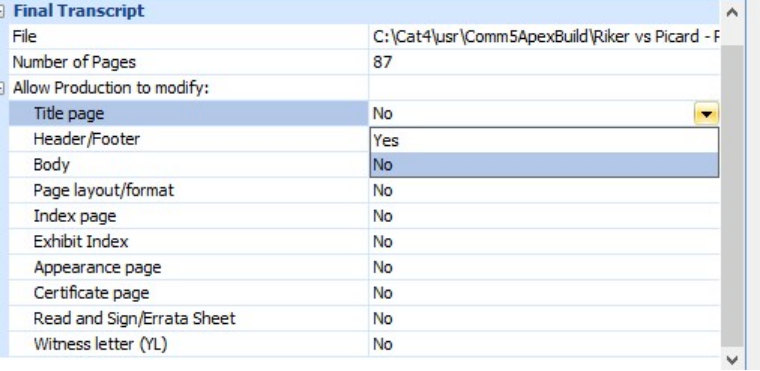
File	C:\Cat4\usr\Comm5ApexBuild\Riker vs Picard - F...
Number of Pages	76
Allow access to ordering Law Firm lawyers	No

Final Transcript

File	No
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Final Transcript


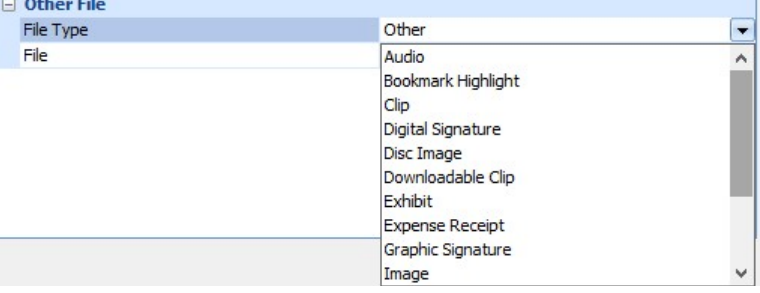
To upload a final transcript for an Apex Job witness do the following:


1. Inside the Final Transcript section of the Upload Files dialog, click on the File field. You may also use **[TAB]** and **Arrow Keys** to position your cursor in the File field.
 
2. Do one of the following:
 - a. If the Apex Job witness has an associated Case CATalyst transcript with an ASCII or PDF file, a  drop down icon will appear to the right of the  browse button icon. You may use the drop down icon to select the final transcript. Click the drop down icon and then click the available Case CATalyst ASCII or PDF final transcript.
 
 - a. If the Apex Job witness does not have an associated Case CATalyst transcript with an ASCII or PDF file, click the  browse button icon. You may then browse to the transcript you'd like to upload as the final transcript.
3. If needed, modify the Number of Pages field for the final transcript. Click on the Number of Pages field and type the number of pages for the transcript. For ASCII and PDF files, Case CATalyst will automatically populate the Number of Pages field.
 
4. Choose your preference for what the Apex Agency production staff can modify in the final transcript.
 - a. Click on each field under Allow Production to modify:
 - b. Click the  drop down icon for each field. Click **Yes** to allow modification, or click **No** to not allow modification.

Other File

The Other File section does not appear by default in the Upload File dialog. However, you do have the option of uploading one or more "Other File" file(s). For example, you may want to upload an Exhibit file.

To upload an "Other File" do the following:

1. Click the **Add Other File** button (**Alt + a**).
2. Inside the Other File section of the Upload Files dialog, click on the File Type field.
3. Click the  drop down icon to display File Type list. Click the File Type on the list that describes the type of file you are uploading. Alternatively, instead of clicking the drop down icon, you may press the **Down Arrow** and **Up Arrow** keys to move through the list of File Types and/or begin typing the name of the File Type.
 

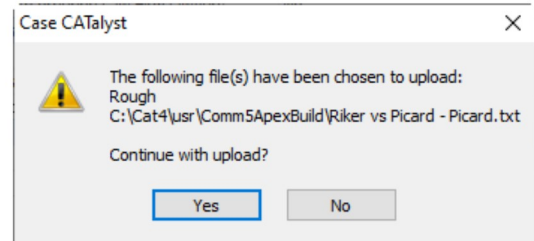
- Click in the File field then click the  browse button icon. You may then browse to the file you'd like to upload as the "Other File" file type selected.



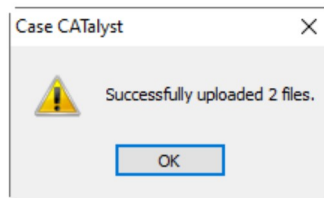
Uploading

To upload the file(s) for the witness of the Apex Job do the following:

- Click **OK** [ENTER].
- A *The following file(s) have been chosen to upload:* message box will appear. The contents on this message box will change depending on what you've selected to upload. It allows you to confirm that the file upload information is correct for Rough, Final and any Other File(s) you've selected for upload. Do one of the following:
 - To proceed with the upload, click **Yes** [ENTER]. The Upload process will begin.
 - To not proceed with the upload, click **No** [ESC]. You will be returned to the Upload Files dialog.



If you selected to proceed with the upload, when the upload is complete you will receive a message confirming the success of the upload. The message will include the number of files uploaded.



View Uploaded Files

You may use the View Uploaded Files button to view which files have already been uploaded for the Apex job. To open the Files Uploaded to Apex dialog, do the following:

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

Files Uploaded To Apex

The Files Uploaded To Apex dialog displays the *File Name*, *File Type*, *File Size*, and if applicable, *Page Count* of the files that have been successfully uploaded to Apex for the current Apex job.

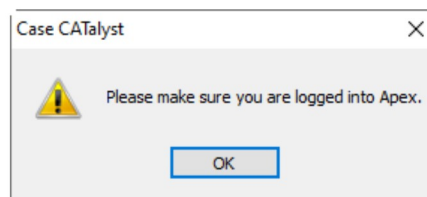
You may also view the Transcript Options for uploaded Rough and Final transcripts. To view the Transcript options, Click the **Transcript Options** button (Alt + t).

The Transcript Options dialog displays the Rough Transcript and Final Transcript options selected at the time of upload. They are view only and may not be changed. To close the Transcript Options dialog click **OK** [ENTER] or click **Cancel** [ESC].

To close the Files Uploaded To Apex dialog, click **Close** [ENTER] or [ESC].

Additional Information:

If you are not logged in to Apex when you try to upload the files, you will receive a message asking you to make sure you are logged in to Apex. After clicking OK on this message the Upload Files dialog will close. Files will not be uploaded until you are logged in to Apex and you complete the Upload Files dialog again.



View Uploaded Files

Description:

The View Uploaded Files option available on the Job Actions menu or the CATalyst Transcript right click context menu, provides a method for opening the Files Uploaded To Apex dialog for the Apex Job associated to the Case CATalyst transcript. The Files Uploaded To Apex dialog provides a method for viewing the files that have been uploaded for the Apex Job, modifying the existing uploads and uploading additional files.

How to Use it:

To select the View Uploaded Files action for a Case CATalyst transcript associated to a witness of an Apex Job, you may use the Apex, Job Actions menu or the right click context Apex menu for the Case CATalyst transcript.

1. Do one of the following:
 - a. With the Case CATalyst transcript selected in Manage Jobs, click **Apex, Job Actions, View Uploaded Files**.
 - a. Right click on the Case CATalyst transcript in Manage Jobs, and then click **Apex, View 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

To access the Upload Files dialog from within the Files Uploaded To Apex 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.](#)

Additional Information:

You must be logged in to Apex to use the View Uploaded Files option.

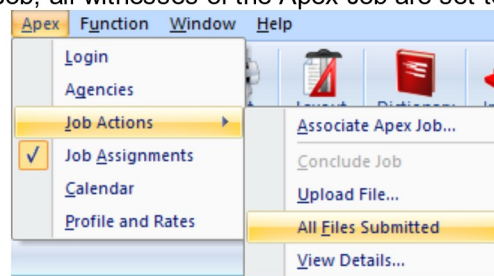
All Files Submitted

Description:

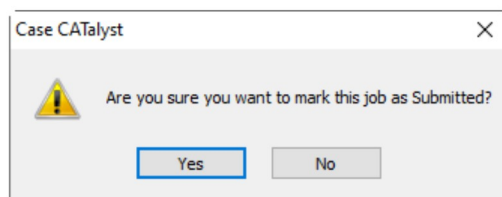
The All Files Submitted option available on the Job Actions menu or the CATalyst Transcript right click context menu, allows you to complete an Apex Job assignment. By setting the Apex Job to a Submitted state, you are saying that all transcript and other files for the job have been produced and uploaded to Apex. The job is complete. When you select the All Files Submitted option on any Case CATalyst transcript associated to any witness of the Concluded Apex Job, all witnesses of the Apex Job are set to an All Files Submitted state.

How to Use it:

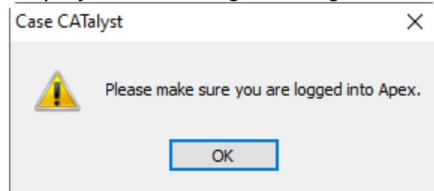
To select the All Files Submitted action for a Case CATalyst transcript associated to a witness of the Apex Job you want to set to a submitted state, you may use the Apex, Job Actions menu or the right click context Apex menu for the Case CATalyst transcript.



1. Do one of the following:
 - a. With the Case CATalyst transcript selected in Manage Jobs, click **Apex, Job Actions, All Files Submitted** (*Alt + a, j, f*)
 - a. Right click on the Case CATalyst transcript in Manage Jobs, and then click **Apex, All Files Submitted**.
2. When the *Are you sure you want to mark this job as Submitted?* message appears, do one of the following:
 - a. If you are sure you want to mark the Apex Job, including all witness of the Apex Job, that is associated to the Case CATalyst transcript as Submitted, click **Yes** [*ENTER*].
 - b. If you don't want to mark the Apex Job as Submitted, click **No** [*ESC*].



If you are not logged in to Apex when attempting to set the Apex Job to Submitted, Case CATalyst will display the following message:



Click **OK** (*ENTER*) to close the message box. Verify you are logged in to Apex and try again.

Additional Information:

You must be logged in to Apex to set an Apex Job to Submitted.

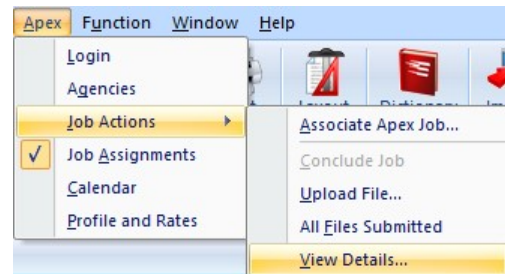
View Details...

The View Details... option available on the Job Actions menu or the CATalyst Transcript right click context menu, lets you see extensive details about the Apex Job associated to the Case CATalyst transcript. Selecting the View Details... action 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 select the View Details... action for a Case CATalyst transcript associated to a witness of the Apex Job you want view the details for in the Apex Job Details dialog, you may use the Apex, Job Actions menu or the right click context Apex menu for the Case CATalyst transcript.

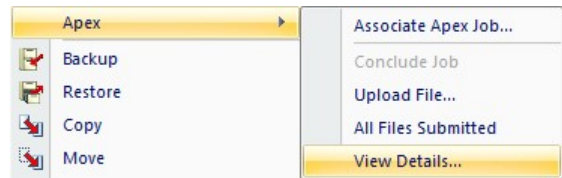


1. Do one of the following:

- a. With the Case CATalyst transcript selected in Manage Jobs, click **Apex, Job Actions, View Details...** (*Alt + a, j, v*)
- a. Right click on the Case CATalyst transcript in Manage Jobs, and then click **Apex, View Details...**

Apex Job Details

The Apex Job Details dialog provides expanded details about the Apex Job associated to the Case CATalyst transcript. 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

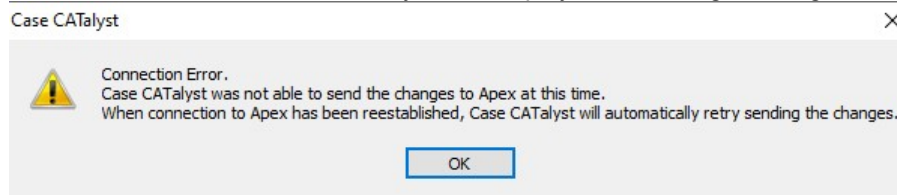
Both files are located in the Apex Worksheet Templates case inside of the System Files case. While you may open and modify these files to fit your specific Job Worksheet format, do not rename or remove these files. Case CATalyst expects to find these files at the default location. If Case CATalyst cannot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

To create a Worksheet, do the following:

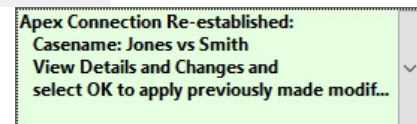
1. Click the **View Worksheet** button.
2. The worksheet will be built based on the Apex Fields and formatting of the Worksheet Template files and will open in your default PDF viewer.
3. You may name and save the Worksheet PDF file by using the "Save As" method of your PDF viewer.

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 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 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*).