# Winusreporter Invoicing/Reporting SYSTEM<sup>™</sup>

# **USER'S MANUAL**

Copyright © LMSoftware, Inc., 1992-2003, All Rights Reserved.

This material is protected by Federal Copyright Law. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, mechanical, electronic, photocopying, recording, or otherwise, without prior written permission of LMSoftware, Inc.

LMSOFTWARE, INC. PROPRIETARY: This material constitutes proprietary and trade secret information of LMSoftware, Inc., and shall not be disclosed to any third party, nor used by the recipient, except under the terms and conditions of the license agreement between the customer and LMSoftware, Inc.

WinUSR<sup>™</sup> US Reporter Invoicing/Reporting System<sup>™</sup>, and USR<sup>™</sup> are trademarks of LMSoftware, Inc.

#### SOFTWARE LICENSE AGREEMENT AND DISCLAIMER OF WARRANTY

#### **READ THIS AGREEMENT CAREFULLY!**

Using this software indicates that you accept this agreement and will abide by it. If you do not agree with what it says, promptly return the software and your money will be refunded.

- 1. <u>LICENSE</u>: You have the non-exclusive right to use *Win*USR<sup>™</sup> US Reporter Invoicing/Reporting<sup>™</sup> software on any single computer system. You may not electronically transfer the software from one computer to another over a network or use the program in a computer service bureau. You may not use, copy, or transfer the software or documentation, or any copy thereof, except as provided in this agreement.
- 2. <u>BACKUP AND TRANSFER</u>: You may make one copy of the program solely for backup purposes. You may transfer the program to another party if the other party agrees to the terms of this agreement. If you transfer the program, you must at the same time transfer the original cd/diskettes and the documentation and transfer or destroy any and all the backup copies.
- 3. <u>TERM</u>: This license is effective until terminated. You may terminate it by returning the <sup>Win</sup>USR<sup>™</sup> US Reporter Invoicing/Reporting<sup>™</sup> software cd/diskettes, documentation, and all copies thereof, or by destroying the software cd/diskettes, documentation and all copies thereof. This license will also terminate if you fail to comply with any term or condition of the agreement.
- **4.** <u>**DISCLAIMER OF WARRANTY:** <sup>Win</sup>USR<sup>™</sup> US REPORTER INVOICING/REPORTING<sup>™</sup> SOFTWARE IS DISTRIBUTED AND LICENSED "AS IS," WITHOUT WARRANTY OF ANY KIND. THE ENTIRE RISK AS TO THE RESULTS AND PERFORMANCE OF THE PROGRAM IS ASSUMED BY YOU.</u>

LMSoftware, Inc., warrants to the original user that the cd or diskettes on which  $Win_{USR^{TM}}$  US Reporter Invoicing/Reporting<sup>TM</sup> software is recorded is free from defects in material and workmanship in normal use and service for a period of 90 days from the date of delivery. This warranty may not be transferred to any other party, and LMSoftware, Inc., limits your remedy to return of any faulty cd or diskettes during such 90-day period for replacement without charge.

NEITHER LMSoftware, Inc., nor anyone who has been involved in the creation, sale or distribution of  $Win_{USR^{TM}}$  US Reporter Invoicing/Reporting<sup>TM</sup> software, shall be liable for any direct, indirect, consequential or incidental damages arising out of the use, results of use, or inability to use such software. Some states do not allow the exclusion or limitation of liability for consequential or incidental damages, so the above limitation may not apply to you.

5. <u>MISCELLANEOUS</u>: This Agreement shall be governed by the laws of the State of Oklahoma.

\* \* \* \* \*

# **INDEX**

Software Agreement					2
System Requirements .					4
About This Manual					4
How to Use This Manual					4
Installing the Program					5
Getting Started:					6
Maintenance - Entering	Personal	 Informat	ion		
The Main Menu	rerbonar	THEOTINGC			, , , , , , , , , , , , , , , , , , ,
	••••				
Δ – Ζ					
Appeal					
Arraign					13
Address	••••				7 13 20 22
	••••			0,	, , <u>, ,</u> , <u>,</u> , , <u>,</u> , , , , , , , ,
	• • • •	• • • • •			17 22
Case Number	• • • •				$\cdots 12$
	• • • •				$\ldots$
	• • • •	• • • • •			4, 9, 15
Criminal					9, 13
Date			7,8	, 11, 12, 14,	15, 16, 19, 24
Delivery Date					11
Defaults			5,	7, 8, 9, 12,	14, 16, 19, 24
Description				9,	14, 17, 18, 21
Diskette					4, 5, 9, 24
Email				7, 9,	13, 15, 20, 25
File					5, 10, 17, 22
Firm					12, 13, 15, 22
Government					9, 13
In Re:	••••				14
Install	••••				
	• • • •	· · · · ·	0 0 10	11 $10$ $10$	14 15 10 22
	• • • •	0, 7	, 0, 9, 10	, 11, 12, 13,	14, 15, 19, 22 10 10 20
Involce Number	• • • •	• • • • •	• • • • •		· · 12, 19, 22
Judicial Officer	• • • •	• • • • •	• • • • •	• • • • • • •	1
Maintenance	• • • •	• • • • •		6,	, 9, 14, 21, 23
Name			(	5, 9, 10, 12,	17, 18, 22, 25
No Charge					13
Order Date					12
Plaintiff					14
Private				8, 9,	10, 11, 13, 21
Print				6, 7, 8,	9, 15, 18, 22
Realtime					7, 13, 18, 24
Restore					,,,,1
Send					9, 15, 25,
II S Attorney	••••				9 12
II 9 Dub Defender	• • • •			• • • • • • •	10 · · · · · · · · · · · · · · · · · · ·
U.S. PUD. DETENDET					

\*\*\*\*

# **MINIMUM SYSTEM REQUIREMENTS:**

- 486 (or above) PC compatible computer with Windows 95 or above.
- 32 meg Memory (or more).
- At least 4 megabytes of free hard disk space.
- CD ROM or 3.5" floppy diskette (CD ROM preferred).
- Windows compatible printer.
- Video resolution of 800 x 600 minimum.

\* \* \* \* \*

# **ABOUT THIS MANUAL:**

Congratulations on your purchase of the WinUSR<sup>TM</sup> US Reporter Invoicing/Reporting<sup>TM</sup> System. This program was produced with the goal of reducing your workload, increasing your productivity, and making your reports easier to produce, more accurate and timely, and this manual was written to help you get started and give you some tips on using the program.

\* \* \* \* \*

# HOW TO USE THIS MANUAL:

All users are encouraged to read this manual completely. Even though you will most likely be able to use the program with no training and without this manual, you might pick up some helpful pointers from those of us who have designed this program and have used it extensively.

If nothing else, please read the "Getting Started" section of this manual. It will help you get the program set up with a minimum amount of time and effort.

# **INSTALLING THE PROGRAM:**

The WinUSR<sup>TM</sup> US Reporter Invoicing/Reporting<sup>TM</sup> System has been provided to you on a CD, (Compact Disk) or high-density 3.5" diskettes. If you have received media that is incompatible with your computer, please call and compatible media will be provided.

#### **CD Installation:**

If you received this software on diskettes, please skip to "Diskette Installation" below.

Place the installation CD in your CD ROM Drive. Within a few seconds your installation process should begin on its own. If not (after waiting 15 to 20 seconds), Click the **Start** button in the lower left corner of your desktop screen. At the Run selection, type the following: (Please substitute your CD ROM Drive Letter for the X)

#### X:\SETUP

#### and press ENTER or click OK.

Please read all information on each screen, especially the Software License Agreement, and proceed only if you agree with it in all respects. If there are any provisions in the Software License Agreement you do not agree with, please do not install the software. You may return it if not installed for a full refund (less shipping and handling charges).

During installation, accept each default unless it will interfere with a program or programs you already have installed on your computer.

The installation procedure will prepare your system and install all files necessary for WinUSR<sup>TM</sup>. You will be advised to reboot your system after the installation process. After your system has rebooted, you may start WinUSR<sup>TM</sup> by Clicking the **Start** button, then selecting and clicking Programs, and then locating "WinUSR<sup>TM</sup>" and double-clicking on the "WinUSR<sup>TM</sup>" icon which will pop up to the right.

#### **DISKETTE Installation:**

In the installation procedure that follows, it will be assumed that you are installing the program from Drive A: and to Drive C: If you are using another installation drive, such as Drive B: or D:, please substitute the drive letter appropriately.

Place the installation diskette in Drive A: Click the **Start** button in the lower left corner of your desktop screen. At the Run selection, type the following:

#### A:SETUP

and press **ENTER** or click **OK**.

Please read all information on each screen, especially the Software Agreement, and proceed only if you agree with it in all respects. During installation, accept each default unless you know that it will interfere with a program or programs you already have on your computer.

The installation procedure will now prepare your system and install files necessary for WinUSR<sup>TM</sup>. You will be advised to reboot your system after the installation process. After your system has rebooted, you may start WinUSR<sup>TM</sup> by Clicking the **Start** button, then selecting and clicking Programs, and then locating "WinUSR<sup>TM</sup>" and double-clicking on the "WinUSR<sup>TM</sup>" icon which will pop up to the right.

After installation, please proceed to "Getting Started" in this manual.

# **GETTING STARTED**

Start the program (if you have not previously done so) as described immediately above.

#### **First things first:**

THE PROGRAM WILL NOT WORK UNTIL ALL OF YOUR PERSONAL INFORMATION HAS BEEN FILLED IN ON THE "Personal Info" AND "District Info" TABS.

At the Main Menu, Click on *Maintenance* and then *User Information*. Fill out all information under each applicable tab. The following screen will be displayed.

😅 Editing Co	nfiguration
Personal Info.	District Info. Defaults Form 1034 (L.A. Only) Pg 1 Form 1034 (L.A. Only) Pg 2
Name:	Larry E. Marks, CM, FCRR.
Name Suffix:	CM, FCRR (i.e., CSR, RPR, RMR, FCRR (12 Chars.)
Tit <u>l</u> e:	United States Court Reporter
<u>A</u> ddress:	4125 U.S. Courthouse
	200 N.W. Fourth St
City:	Oklahoma City ST: OK Zipcode: 73103
P <u>h</u> one:	(405) 609-5123 Eax:
SS <u>N</u> o.:	444-44-4444 <u>E</u> IN No:
e- <u>m</u> ail:	Tarryemarks@swbell.net (Optional - Prints Only on Invoices,
	<u> </u>

The "Maintenance" section of this program will be discussed in greater detail later in this manual. For now, it is important that you enter your personal information in the User Information.

**Name ALL CAPS:** (Affects Invoices only) By pressing **Y** or **N** here, you select whether you want your name printed in all caps or in mixed case on your invoices. You might try both to see which you prefer.

**Name Suffix:** Enter characters to follow your name, i.e., CSR, RPR, CRR, CM, etc., or even "Inc." if you are incorporated. A leading comma is not necessary, as it will be automatically entered if you enter any characters in this field. You may leave the suffix blank if you prefer.

Title: You may enter your title here, i.e., United States Court Reporter.

Address: Lines 1 and 2, fill out appropriately. Address Line 2 may be left blank and the City and State will automatically pull up to fill these blanks when printed on invoices.

**City, State, Zip Code, Phone** and **Fax:** Fill out appropriately. You may leave the Fax field blank if you choose. If so, nothing will be printed on your invoices referring to Fax.

SS Number: This field MUST BE COMPLETED as it is required for your AO40A and AO40B reports.

**Print SSN on Invoices:** Check this box if you want your Social Security Number to be printed on your invoices. If you do not select this box, your EIN number will be printed your invoices if you have entered one in the next field. Your SSN number will be displayed on your reports regardless of this selection.

EIN: If you have an Employer Identification Number and want it to appear on your invoices, fill out appropriately.

**Email:** (Optional) if you want your email address to be displayed on your Invoices, enter it here. Otherwise, leave blank.

After filling out all fields on this screen, click the tab (or Alt-D) at the top of the entry form entitled **District/Other Information** and the following screen for District/Other Information will be displayed.

#### TAB 2: District Info. Tab

-	🛿 E diting Configuration
	Personal Info. District Info. Defaults Form 1034 (L.A. Only) Pg 1 Form 1034 (L.A. Only) Pg 2
	Duty District: Western District of Oklahoma
	Duty Station: Oklahoma City, OK
	Location Code: [Prints Only on CI424
	NCRA CRR Certified:  Date Certified by NCRA:
	USCRA FCRR Certified: 🗖 Date Certified by USCRA:
	Other Realtime Cert: Date Certified: 🛨 🛄
	Prorate Expense between Private/Official: 🔽
	Forty-Hour Tour of Duty (Leave Act):
	DO NOT Remind Me When Reports Are Due: 🔽
	<u>D</u> K <u>Cancel</u>

Duty District: Fill out appropriately, i.e., "Southern District of New York."

Duty Station (City): Fill out appropriately, i.e., "New York City, NY."

**Location/Organization Code for CJA-24:** You may enter your Location/Organization Code here and it will be entered by default on each of your CJA-24 invoices. You may obtain this number from your Court Clerk's Office.

**NCRA CRR:** Check this box if you are a Certified Realtime Reporter certified by the National Court Reporters Association. You will then be prompted for the date on which you were certified.

**USCRA FCRR:** Same as above, except certified by USCRA. You will then be prompted for the date on which you were certified.

**OTHER RT CERTIFICATION:** Enter Other RT Certification accepted by the Administrative Office and the date certified.

**Prorate Expense between Private/Official:** This selection affects the AO40B Annual Report. Check this box if you want *Win*USR<sup>™</sup> to automatically calculate a ratio between Private (Freelance) income and Official income and prorate your expenses between Official and Private income/expense based on that ratio. If you do not check this box, you may still allocate the expenses on an entry-by-entry basis in the Expense Entry Screen.

Forty-Hour Tour of Duty: Check this box if you are under the Leave Act.

**DO NOT Remind Me When Reports Are Due:** You will be reminded on the Main Screen of WinUSR when your Quarterly and Annual reports are due. If you do not wish to have this reminder pop up on your Main Screen, check this box.

#### TAB 3: Defaults Tab

😅 Editing Configuration 📃 🗖 🔯					
Personal Info. District Info. Defaults Form 1034 (L.A. Only) Pg 1 Form 1034 (L.A. Only) Pg					
Default Number of INVOICES to Print: 🛛 💈 🛛 Preview Invoices: 🔽					
Default Number of REPORTS to Print: 🛛 🚖 🛛 Preview Reports: 🔽					
Print All Price Fields on Printed Invoices: 🔽					
Print this Selection on Invoices     Print this Selection on Reports     Social Security No.     Employer Identification No.     Identification No.					
Default New A044 Invoice to Following Types Criminal C Civil					
<ul> <li>Government</li> <li>Private</li> </ul>					
Default Printer:					
email Printer: pdfFactory					
Default Transcript Description for AO44 Invoice: Reporter's Transcript of Proceedings					
Private Inv. Banner:					
<u> </u>					

**Default Number of Invoices to Print:** Enter the number of Invoices you normally print. You may change this selection at print time.

Preview Invoices: Check this box if you want to preview your invoices on the screen before printing.

**Default Number of Reports to Print:** Number of Reports you normally print. You may change this selection at print time.

**Preview Invoices:** Check this box if you want to preview your reports on the screen before printing. You might find this useful just to check your billing progress.

**Print All Prices on Invoices:** Check this box if you prefer that the price of categories not applicable to the invoice you are making be printed on the invoice. If you do not make this selection, only the prices applicable to the invoice will be printed.

**Print this Selection on Invoices:** You may choose whether you want to print your SSN or your EINon your Invoices. If you choose the EIN number and it is blank under the Personal Info. Tab, the invoice will not contain your tax information.

**Print this Selection on Reports:** You are required to have either your SSN or the last four digits of your SSN on your reports for identification purposes. Make the appropriate selection here.

**Default New AO44 Invoices to Following Type:** You MUST select either Criminal or Civil and either Government or Private for the page rates to be properly selected and automatically entered in your invoices. If you do mainly Criminal transcripts, select Criminal, and if your do mainly Civil transcripts, select Civil.

**Default Printer:** If you want to use a different printer for WinUSR than your default printer, enter the name of the printer driver exactly as it appears in your Settings/Printers section of Windows.

**Email Printer:** If you have an Adobe type PDF Writer and wish to send your invoices via email, enter the driver name exactly as it appears in your Settings/Printers section of Windows. A Trial Version of a programwe recommend, called FinePrint pdfFactory, is included on your CD, which we have been given permission to distribute for your trial. It will also work in conjunction with your email systems so that you can email invoices directly from within *Win*USR<sup>TM</sup>.

**Default Transcript Description for Invoices:** You may enter a phrase that you normally use in the Transcript Description area of your invoices, i.e., "Reporter's Transcript of Proceedings had on ..." It will then be entered by pressing a button above the Description area of the invoice.

**Private Inv. Banner:** You may enter a phrase to be Automatically printed on Private/Freelance Invoices, i.e. "Free ASCII Diskettes," or "eTranscripts Provided on Request."

#### TABS 4 & 5: "Form 1034" LA (Only):

If you are a Los Angeles, CA, reporter or you use the Form 1034 for the U.S. Attorneys in your area, click the tab (or Alt-L) at the top of the entry form entitled "Form 1034" LA (Only) and an additional screen will be displayed. Fill out each entry according to the way you want them to appear on the 1034 Invoice form.

\* \* \* \* \*

After you have entered all information in the User Information Section of Maintenance, you are ready to begin using the program. The next sections of this manual will explain what each Menu category includes and an explanation of each function.

\* \* \* \* \*

# THE MAIN MENU:

On the Main Menu screen you will notice that the Version of WinUSR<sup>TM</sup> and your name appear toward the top of the screen to the right of the WinUSR<sup>TM</sup> logo.

W'Wi	NUSR" U.S. R	eporter Invo	cingiRepo	rting System						_ 6 🛛
File	Invoices	Clients	Firms	Time & Attendance	Expense	Reports	Maintenance	Window	About	
Win	U R 1.01.	V		Larry I	5 Marks, CM,	FCRR				

Clicking with the mouse or Holding down the Alt Key and pressing the Underlined letter of any of the menu items will open that menu item.

\* \* \* \* \*

# FILE:

From the Main Menu click *File* (or Alt-F) for various functions that will be of value to you from time to time, most notably backing up your <sup>Win</sup>USR<sup>™</sup> data.

\* \* \* \* \*

## **INVOICES**:

From the Main Menu, click *Invoices* (or Alt-I) and from the submenu, select either **Official Invoices** or **Private/Freelance Invoices:** Assuming you have selected Official Invoices, the following table of invoices will be presented.

-	/ (	Official I	nvoices							[	
	So	rt By <u>I</u> nvoid	ce No.	By D <u>a</u> te	By Case 1	<u>Чо.  </u> Ву	Na <u>m</u> e	By <u>F</u> irm	By P <u>la</u> intiff	By D	efendan <u>t</u>
	ſoDo	Inv. No	Date	Case No.	Inv. Total	Total Due		Name	Firm		City 8 🔨
	/	20040064	11-04-2004	CR-03-0139-T			The Hon	. Ralph G. Tho	orr Provided at no	Charge	Oklahd
		20040063	11-01-2004	CR-03-0139-T	51.15	51.15	CJA24 - 1	Tirado, David F	Pa Edmond Geary	, Attorney	Oklahc
	/	20040062	11-01-2004	CR-03-0139-T	77.19	77.19	CJA24 - 1	Thomas, Brook	e Howard R. Ha	ralson, Atti	Oklahc
	/	20040061	11-01-2004	CR-03-0139-T	77.19	77.19	Ms. Tere	sa Brown	United States I	Public Def	Oklahc
		20040060	11-01-2004	CR-03-0139-T	128.34	128.34	Mr. Steph	hen Jones	Stephen Jones	s & Associ	Enid, C
1	1	20040059	11-01-2004	CR-03-0139-T	409.20	409.20	Mr. Rand	lal A. Sengel	United States /	Attorney's	Oklahc
		20040058	11-01-2004	CR-03-0139-1	00.50		The Hon	. Halph G. Tho	r Provided at no	Charge	Uklahc
		20040057	10-19-2004	CR-03-0242-1	26.56	26.56	Ms. Lesh	e M. Maye	United States /	Attorney's	Uklahc
		20040055	10-19-2004	LR-03-0242-1	105.60	105.60	WA24 - E	Brown, Clifford	M Eulberg Law U	ffices	Uklahc
		20040055	10-19-2004	CR-98-0093-1	13.28	13.28	Mr. M. Ja	ay Farber	United States /	Attorney s	Ollaho
		20040054	10-19-2004	CB 02 0070 T	52.80	52.80	Ma Ladi	wilson, Corey /	Ar Eulberg Law U	ffices	Oklaho
		20040003	10-10-2004	CD 02 0070-1	120.00	120 00	MIS. LESI	e M. Maye Laakaan, Cadh	United States /	Attorneys	Edmon
		20040002	10-10-2004	CD-03-0070-1	50.00	100.00	CIA24	Jackson, Canu Tirada, David	Edmond Goor	Attorney	Oklaba
		20040001	10-10-2004	CP.02.0129.T	07.00	07 90	CIA24 -	Thomas Brook	a Howard P. Ha	, Altomey	Oklaho
		20040030	10-10-2004	CB.03.0139.T	87.98	87.98	Me Tere	ea Brown	Inited States I	Public Def	Oklaho
		20040043	10.10.2004	CB.03.0139.T	87.98	87.98	Mr. Band	tal A Sendel	United States (	Attorneu's	Oklahe
		20040040	10-07-2004	CB-03-0139-T	466.40	01.00	Mr. Stenk	hen Jones	Stephen Jones	& Associ	Enid C
		20040046	10-08-2004	CB-03-0242-T	46.20	46.20	Mr M Ja	v Farher	United States	Attorneu's	Oklaho
	4 I =	1	1						1		
L	<u> </u>	1									
4	<b>V</b> 1	ndicates In	complete Jol	b: <i>(Delivery Da</i> l	tej						
	Dup Inv	licate oice	Print Invoice	<u>S</u> end	Print Attorney <u>R</u> cpt	Print Cler <u>k</u> Rcp	ot. Ney	v Invoice	<u>E</u> dit <u>C</u> l	ose	Delete

If this is your first time to prepare an invoice, the above table will be empty.

The following will explain the making of an Official Invoice which will be, to a large extent, applicable to the making of Private Invoices. You will notice several buttons along the bottom of the Official Invoice Table which will be explained here.

**New Invoice Button:** To prepare a new invoice, Click the *New Invoice* button (or Alt-W), and then select the type of invoice by clicking the invoice type or pressing the appropriate letter.

The following will explain the preparation of an AO44 invoice, which you will probably be using most of the time, and will cover the basics of preparing all other invoice types.

This is a good time to discuss the Date Entry Fields in WinUSR<sup>TM</sup>. All Date Fields will have a button to the left of the field and a Blue/Green Box to the right of the field symbolizing a calendar. Pressing the button on the left side of the entry field will insert the current date, and pressing the Blue/Green Calendar Box to the right of the field will bring up a calendar, from which you can select any date you wish. NOTE: Once in the calendar, you must press the ESC key to exit without making an entry or click the Green Check Mark to insert the date you have selected.

The Calendar has small arrows to the right and left of the Month/Year at the top of the calendar. Pressing these will increment the calendar one month at a time. Selecting the date and clicking the Green Check Mark at the bottom right of the calendar will insert the selected date

₩ Adding AO44 Invoice	
A044 Invoice - Page <u>1</u> Page <u>2</u>	
Date: > 11-07-2004 € Ⅲ Invoice No: 20040065 _ Order Dat	te: > 11-07-2004 🛨 🛄 Delivery Date: > 🚔 🏢
Name:	<u> ⊂ G</u> overnment ⊂ Pri <u>v</u> ate <u> ⊂ Cr</u> iminal ⊂ Civi]
Firm:	Undo (Applies to Realtime Only) U.S. Attorney C U.S. Pub. Defender
Addr 1:	Accounting Classification/DCN
City, ST: ,	(Select ONLY ONE of the following if applicable:)
Phone: Fax:	Appeal     Provided to Judicial Officer at No Charge     Arraign., Plea or Sentence at No Charge
CASE NO-PLAINTIFF	DEFENDANT
In Re:	VS.
Transcript Description: Press to Paste I	Default Transcript Description Below
Quick	Pay <u>O</u> K Cancel

**AO44 Invoice:** Upon opening the Invoice entry screen, the DATE will be filled with the current date.

You may also type in the date, and the Automatic Filling function will assist you. For instance, if you type in 511, the program will intuitively fill in 05-01-2001, or if you type 1211 it will automatically fill in 12-01-2001.

**Invoice Number:** Your first invoice number will automatically be filled in with 00000001. It has been my suggestion and practice to overtype this number beginning with the year, i.e., 20020001. Each succeeding invoice will then be incremented accordingly, i.e., 20020002, 20020003 ..... without having to enter the preceding year. This is entirely a matter of choice, but you may find it useful to know which year the invoice pertains to. If you follow and use this convention, you should change the prefix of the first invoice of each succeeding year by overtyping the invoice number as follows: 20030001, et cetera.

Order Date: Self-Explanatory. Will default to the current date.

**Delivery Date:** Also Self-Explanatory.

**Name:** For your first invoice you will not have any clients entered. When you reach the *Name* field, the *Clients* table will automatically be displayed. Since it will be empty, Press the **New** button at the bottom of the screen and fill in the First Name, Middle Initial (if applicable) and Last Name.

Name: Firm: Addr 1: Addr 2:	First <u>N</u> ame: <b>  </b> Firm Name:	MI: Last.	Civil nder
City, ST	Address: Nity ST Zin:		ble:)
-CASE I P Trans A	Phone: Private Ph.: Private Ph.: Private Ph.: Private Ph.: Phone:	Fax: Pvt. Fax: Asst. Phone:	

After entering the Last name, press the Tab key and the Firms table will be displayed.

-		75.75					
Date: >	🗮 FIRMS						] 🗄 🗉
Na <u>m</u> e:		Adding a F	irm			Phone 🔼	Civil
Firm:	Abel, Musser, Adams & Asso	irm Name:	π			239-7046	nder
Addr 1:	Andrews, Dav	inni i danie.				272-9241	
Addr 2:	Berry & Van M A Berry & Berry	ddress:				524-1040 524-0080	
City, ST	Bonham, Swar A Brett D. Sange	<u>d</u> dress:				943-6650 232-1015	ble:)
Phone:	Burrage Law F C	ity:	1		<u>S</u> T:	920-0700	
	Carol Elliott, an Carron M. Corr Zi	ipcode:				634-7820	
CACEL	Cash Sale	. i				280-0115	
LASE	Cathcart, Goft	none:	1			524-1110	
1	Charles Bloese	ar				232-4444	
Tranc	Clark & Mitche		<u>.</u>			1005 0400	
		-mail:				232-4271	
	Courbois & Gile	HISTORIAN A	50 			524-7507	
	Crowe & Dunle		<u>0</u> K	<u>C</u> ancel		235-7700 💌	
	<u>S</u> e	elect	New	<u>E</u> dit	Llose	Delete	

Since it will be empty, press the New button and enter all information for the firm, and then press OK

You now have a Firm for the Client. Click the **Select** button to add the firm to your Client and you will be returned to the Client Entry screen and the firm, with address and other information, will be inserted.

You may now enter any personal information for that client, such as if he has a Private telephone line, Private Fax Line, or a Private email address.

After completing all information for that client, press Enter or Click OK and you will be returned to the Client table.

Your first Client will be highlighted, and you may press Enter or Click the Select button to insert your new client.

Once you have entered most of your usual clients, you will generally be selecting a client already existing. In that case, you will highlight the client and press the Select key or Press Enter and the client will be inserted.

**Government – Private:** Tab to the *Government-Private* selection. Use your right and left arrow keys or click the appropriate selection.

Criminal – Civil: Use the same method above to make the appropriate selection.

**U.S. Attorney – U.S. Pub. Defender:** Make appropriate selection. If you select one and find that neither is appropriate, press the **Undo** button to the left of these entries to unselect. This entry is necessary only for the FCRR/CRR Quarterly Report.

**Appeal:** Click the box or select with the tab key and press the space bar to check the box for Appeal if this invoice is for a transcript on appeal.

**Provided to Judicial Officer at No Charge:** Click this box if the transcript was prepared for a judge at no charge. Please Note the "No Charge," as the prices per page will be excluded if you make this selection.

Arraign., Plea or Sentence at No Charge: Click this box if the transcript was prepared at no charge as in the selection above.

**Realtime Provided Judge at No Charge: (If CRR or FCRR) Click** this box if you provided realtime to a judge. If this box is checked, no prices will be automatically entered on the next page.

#### **CASE NO:** Self-Explanatory.

**IN RE:** If your Case Caption is an In Re rather than a Plaintiff v Defendant, check this box and an appropriate input line will be presented.

PLAINTIFF: Self-Explanatory.

**DEFENDANT:** Self-Explanatory

Transcript Description: Enter description of the transcript being provided.

Example: "Reporter's Transcript of 12-02-01 Plea Proceedings, and 02-02-02 Sentencing Proceedings."

You will note there is a long button with the words "Press to Paste Default Transcript Description Below" above the Transcript Description field. You may enter a default for this button in the Defaults section of User Information in the Maintenance Section of  $Win_{USR^{TM}}$ .

When you have completed all information on the first Page/Tab of the AO44, you may press the Tab key or click the "Page 2" tab to proceed to TAB 2 or the second page of the invoice and you will be presented with the following screen,

A044 Invoice - Page <u>1</u> Page <u>2</u>	
ORIGINAL 1ST COPY	ND COPYTotal
0EDINARY: 330 0.83 0.	5
EXPEDITED: 4.40 0.83 0.	5
DAILY: 5.50 1.10 0.	3
HOURLY: 6.60 1.10 0.	3
REALTIME: 2.75 2.75 2.75	5
Misc Desc: Mis	:. Char <u>G</u> es:
	Subtotal:
Discount for La	te Delivery:
<u>I</u> AX (If	Applicable):
Deposit Check No: Deposit Date:	Depo <u>s</u> it:
Refund Check No: Refund Date: >	Refund:
Paid by Check No: Date P <u>a</u> id: > 🚖 🛄 T	tal <u>P</u> aid: 🛒
	Total Due:
Quick Pay QK	Cancel

Enter the number of pages in the appropriate Page field. Your totals will be automatically updated as you proceed through this page.

If you have a miscellaneous charge, enter the amount in the Misc. Charges field. You must then input a description for the miscellaneous charge, i.e., "FedEx charges in excess of regular postage."

The fields below the midline should be filled out appropriately. If the invoice has been paid in full or there has been a deposit made, enter the appropriate amount in each field and be sure to enter the date for such payments. If the date of a payment is not entered, your reports will be adversely affected.

Once you have completed all entries on the invoice, you may click OK or press the **Enter** key and the invoice will be saved and you will be returned to the Invoice Table where you will see your first invoice.

**Print Invoice Button:** You may then print the invoice by pressing the **Print Invoice** button at the bottom of the screen. It will first be displayed on your screen for your approval, and then you must press the **Print** button at the top left of the screen to print the invoice.

**Send Button:** The **Send** button will act the same as the **Print Invoice** button unless you have installed FinePrint pdfFactory (included on your CD) or other similar program. If installed, you can email invoices directly from *Win*USR<sup>TM</sup>.

**Print Attorney Rcpt Button:** Press this button to print an Attorney Receipt for Transcript.

Print Clerk Rcpt Button: Press this button to print a Clerk's Receipt for Filing.

\* \* \* \* \*

## CLIENTS & FIRMS:

Entering Clients and firms has been explained within the making of an invoice, but the same applies for the Menu Items. You may enter your clients and firms at any time using these menu items.

\*\*\*\*

# TIME & ATTENDANCE:

From the Main Menu, click *Time & Attendance* (or Alt-T) and from the submenu, select **View Time & Attendance Entries**. Since the table will be empty, click the **New** button at the bottom of the screen and the following screen will be presented.

🖷 T	🗮 Adding Time & Attendance				×
Attend Dal 11-05- 11-04- 11-03- 11-02- 11-01- 10-31-	Date: > 11-08-2004 € Ⅲ Tin Case <u>N</u> o: Type Hearing: <u>E</u> stimated Pa	ne: City of Att Short Caption Ses: Realti (for Jud	endance: Judge's Init: ine Pages: inicial Officer only)		
10-30- 10-29- 10-28- 10-27- 10-26- 10-25- 10-24- 10-23- 10-22- 10-21- 10-20- 10-19- 10-19- 10-19- 10-19- 10-19- 10-19- 10-19- 10-19- 10-19- 10-20- 10	Administrative:     Image: Constraint of the second s	Hrs. Substitute Hrs. Hr """"""""""""""""""""""""""""""""""""	s. Specify:	C Comp	
10-13- 10-18 10-17- 10-16- 10-14- 10-13- 10-12- 10-11- 10-10- 10-10-	Leave       Notes:       (NOTE: All BLUE Italicized items)	Hrs. C w/o Paγ	© Other- Specify:	el	>

Date: Will default to current date. Adjust as appropriate.

Time: Enter the Beginning time of the related appearance.

**NOTE:** (You will notice that some of the field prompts are *Italicized* and Blue. This indicates that these are optional fields. They will only be used to create Attendance Information Ledgers for your benefit, but are not required by the AO. You will find them very useful, and you should at least fill out all information on a few of your appearances and see if the Attendance Information Ledgers will be of benefit to you. Making separate entries for each hearing during a day can be used as a log to reference when you are called for transcript orders. If all information is kept in detail, it helps in making quick transcript estimates.)

Attend Da 11-05- 11-04- 11-03- 11-02- 11-01- 10-31-	➡ Adding Time & Atten     Date: > 11-08-2004     Case No:     Type Hearing:	dance	AM <u>City of Attendance:</u> <u>Short Caption:</u> <u>City of Attendance</u> <u>Short Caption:</u> <u>Guthrie, Oklahoma</u> Lawton, Oklahoma <u>Realtime Pages.</u> (for Judicial Officer only)
10-30- 10-29- 10-28- 10-27- 10-27- 10-26- 10-25- 10-24- 10-23- 10-22- 10-22-	Administrative: <u>T</u> ranscript Prep.: <b>Appearance Before</b> <u>J</u> udges: <u>M</u> agistrates: Ot <u>h</u> ers: Travel:	Official Hrs.	Substitute Hrs. """"""""""""""""""""""""""""""""""""
10-21- 10-20- 10-19- 10-18- 10-18- 10-17- 10-16- 10-14- 10-13- 10-12- 10-11- 10-10- 10-10- 10-10-	Leave	Hrs.	C Annual C Sick C Admin. C Comp C w/o Pay C Other- Specify:
	(NOTE: All BLUE Italic	ized items are Inforn	national only.) <u>O</u> K Cancel

City of Attendance: When you tab to this field, it will automatically bring up a blank list of Cities.

Press the **Add** button and enter either one or multiple cities in which you attend court. Subsequently, you will merely highlight the city and click the **Select** button or press Enter to insert the City of Attendance. You may also begin typing the name of the city and the city will be selected, then press the **Enter** key, and it will be inserted.

**Case No:** Enter the appropriate case number for the hearing you are attending.

**Short Caption:** Enter a short version of the caption which will be meaningful to you when you see it on the Attendance Information Ledger.

Type Hearing: Enter a brief description of the type of hearing, i.e., "Sentencing," "Waive & File," et cetera.

**Judge's Initials:** When you tab to this field, it will automatically bring up a blank list of Judges. Press the **Add** button and enter the Judge's Initials. Then press the tab key and enter the Judges name, i.e., "The Honorable Ralph G. Thompson." You may enter as many judges as you know you will be appearing before. You will then simply select the appropriate judge and press the **Enter** key or **Select** button to insert the judge's initials.

# 1	🛩 Adding Time & Attendance	XX
Attend Da 11-05- 11-04-	Date: > 11-08-2004 € III       Time:       9:00AM       City of Attendance: Oklahoma City, Oklahoma ▼ +/-         Case No:       CR-04-0241-T       Short Caption:       USA v Defendant	
11-03- 11-02- 11-01- 10-31-	Type Hearing:       Motion to Suppress       Imit.       Judge's Init:       Imit.         Estimated Pages:       Init.       Judge's Name       A         BR       Magistrate Judge Bana Roberts       Imit.       Imit.	
10-30- 10-29- 10-28- 10-27- 10-27- 10-26- 10-25- 10-24- 10-23-	Administrative:       Image: Constraint of the second	
10-22- 10-21- 10-20- 10-19-	Travel:     RJC     Chief Judge Robin J. Cauthron       Hrs.     RLH     Magistrate Judge Ronald L. Howland       Hrs.     C Annual     C Sick     Admin.	-
10-19- 10-18- 10-17- 10-16- 10-14- 10-13- 10-12- 10-11- 10-10- 10-10-	Notes:	
	(NOTE: All BLUE Italicized items are Informational only.)	

**Est. Pages:** Self Explanatory. If you run realtime, you will have a fairly accurate number to place in this field, otherwise estimate the number as you normally would.

Administrative: Enter the number of hours (in whole and hundredths, i.e., ".25" for 1/4<sup>th</sup> hour) you spent for administrative type duties, i.e., preparing dictionaries for new jobs, returning telephone calls to clients, entering data in WinUSR, et cetera. This is important information for you, your Court Reporter Supervisor, and the Administrative Office.

**Transcript Prep.:** Enter the number of hours, using the technique described above, for hours spent preparing transcripts.

**Official - Judges & Substitute – Judges:** Enter the appropriate number of hours of actual court appearance, using the technique described above, for hours actually spent in reporting court proceedings.

Official - Magistrates & Substitute – Magistrates: Same as above.

**Official – Others & Substitute – Others:** Same as above, and type in a description of the Other Appearance in the *Specify* field.

Travel: Enter the appropriate number of hours traveling.

Leave: Enter the appropriate number of leave hours and select the type of leave below.

**Notes:** Use the Notes area for any notes you wish to keep pertaining to the day's appearance, i.e., witness names, appearances, meetings with your CR Supervisor, et cetera. A brief portion of these notes will be printed on your Attendance Information Report.

**Copy/Paste Buttons:** The Copy and Paste Buttons are useful when you have a continuing hearing/trial. You may copy the entries from one day and then paste them to a new day the same as the Copy and Paste buttons work in other Windows programs.

**NOTE:** If you make multiple entries per day, be sure and enter only one set of Administrative Hours and Transcript Preparation Hours for that day.

\* \* \* \* \*

# **EXPENSES**:

From the Main Menu, click *Expense* (or Alt-X) and from the submenu, select either **View Expenses**. Since the table will be empty, click the **New** button at the bottom of the screen and the following screen will be presented.

۲	AO40B EXPENSES	×
	🛱 Adding an Expense 📃 🗖 🔀	^
12 12 12 12 12	<u>D</u> ate: ▶ <u>11-07-2004</u> ★ <u>C</u> heck No:	
10	Inv. No.: Payee:	
10 10 10 10	Category:	
08	Desc.:	
07 06 06	Itemize: (if required)	
06	Amount: Expense Type	
06		
05	<u>O</u> K Cancel	
	<u>N</u> ew <u>E</u> dit <u>C</u> lose Delete	

Date: Today's Date will be defaulted. Adjust as appropriate.

Check No: Enter appropriate check number or "Cash" or "Visa," et cetera.

Inv. No.: Enter invoice number if appropriate.

**Payee:** When you tab to the *Payee* field, you will be presented with a screen listing your payees. If this is your first expense entry, press the **New** button and you will be presented with the following screen.

💐 Adding a Pa	iyee			
	<u>N</u> ame:	*		
	Address <u>1</u> :	L		
	Address <u>2</u> :	T		
	<u>C</u> ity, ST, Zip:	-		
	Contact Perso	n: [		
	Phone:	1	Eax	
	Toll Free:			
	Account No.:			
	email:			
	website:	I.		
E <u>x</u> pense Category: Expense	*			
Description	Ľ			
* (Requ	vired Fields,	<u>0</u> K	<u>Cancel</u>	

Name: Enter payee name.

Address 1 & 2: Enter appropriate address. (Optional)

City, ST, Zip: Enter appropriately. (Optional)

Contact Person: Same. (Optional)

Phone & Fax & Toll Free: Same. (Optional)

Account No: Same. (Optional)

Email: Same. (Optional)

Expense Category: When you tab to the Expense Category field, the following screen will be presented.

	<u> </u>						
Ca	AO40B Expense Category Description						
104	Compensation paid to Substitute Reporters due to absence.						
10	Compensation paid to Substitute Reporters to assist with daily and hourly transcript						
100	Compensation paid to Note Readers						
100	Compensation paid to Transcribers						
100	Compensation paid to Typists						
10f	Compensation paid to Scopists						
109	Compensation paid to other clerical personnel						
11	Employer's contributions (FICA, etc.)						
122	Travel incident to private reporting activities						
12t	Travel by substitute reporters and other personnel						
13a	Rent for office space (including utilities)						
13t	Rent for copy equipment						
130	Rent for CAT equipment						
130	Other rent (Specify)						
14	Equipment repairs and maintenance						
15	Postage expense						
15	Telephone expense						
150	Other communications expense (Specify)						
( <b>k</b> 16	Supplies and materials						
at 17	Other expenses (itemize on back all other expenses claimed)						
X							
e	Select Close						

Highlight the appropriate expense category and click the **Select** button or press the **Enter** key to insert both the Expense Category and the Expense Description.

Itemize: (If Required) Certain expense entries require an Itemized description. Enter as appropriate.

Amount: Enter amount of expense.

**Expense Type:** Select whether the expense was an expense for Official work or Private (freelance) work. (Note: If you have made the selection in the User Information Section of Maintenance to automatically apportion the expense between Official and Private income, this selection will be disabled.)

Press the **OK** button and your expense entry is complete and you will be returned to the table of expenses. You may close it or make other entries as appropriate.

#### **EXPENSES/PAYEES:**

This has been described in detail during the preparation of the Expense item; however, you may enter these from this menu item in advance if you choose.

#### **EXPENSES/DEPRECIATION:**

You may enter depreciable expense items here for entry into your AO40B, Annual Income and Expense Report. You should refer to your tax consultant for these entries. This is merely provided for your use to input the data into the report.

# **<u>REPORTS/Official Reporting:</u>**

The following is a listing of the reports that <sup>*Win*</sup>USR<sup>™</sup> produces and their intended use.

Accounts Receivable Ledger: This is a report for your personal use to keep you apprised of unpaid invoices. It is also usable in making collection calls, as it lists the client's name, phone number, Invoice Number, Case Number, and Case Caption

**Gross Receipts Ledger/Gross Receipts – by Date:** This is a report for your personal use of your total receipts for any given period. This is useful for tax computations, et cetera.

**Gross Receipts Ledger/Gross Receipts – by Firm:** This is a report for your personal use of your total receipts for any given period. This is useful in checking 1099s received from attorneys/firms.

**AO40A** – **QUARTERLY REPORT:** This report is required to be filed on a quarterly basis by the 15<sup>th</sup> of the month following the ending of the quarters. Some CR Supervisors may require the report be presented to them in advance for checking/auditing.

**FCRR/CRR – QUARTERLY REPORT:** A required quarterly report. (See above.)

**Print Blank FCRR/CRR REPORT:** If you are required to file an FCRR Report but have not produced any realtime for parties or the Court, you may print a blank one for filing purposes.

**AO40B** – **ANNUAL REPORT:** This report is required to be filed on an annual basis by the  $20^{th}$  of April. Some CR Supervisors may require the report be presented to them in advance for checking/auditing.

**Depreciation Schedule:** This report is required if you are depreciating equipment and have filled out the appropriate depreciation entries in the Expense Section.

**Other Expenses Attachment:** This attachment must be filed with the AO40B if you have any "Other Expenses" in Section 17 of the AO40B.

**AO37** – **Expense Ledger:** This report is required to be kept by you, but not presented to the AO. Some CR Supervisors may require the ledger be presented to them for checking/auditing.

**AO38** – **Attendance Ledger:** This report is required to be kept by you, but not presented to the AO. Some CR Supervisors may require the ledger be presented to them for checking/auditing.

LM38 - Attendance Information Ledger/All Attendance: This report is informational only.

**LM38** – **Attendance Information Ledger/Reporting Attendance Only:** This report is informational only, but you may find it very useful in your day to day duties, i.e., estimating transcripts, et cetera.

**AO39 – Transcript Orders & Collections Ledger:** This report is required to be kept by you, but not presented to the AO. Some CR Supervisors may require the ledger be presented to them for checking/auditing.

**LM39 – Transcript Deliveries & Collections Ledger:** This report is informational only, but is very useful in checking/auditing transcript pages and days of attendance on your AO40A Quarterly Report.

**Transcripts on Order/Not Completed:** If you make an invoice at the time of Order and omit the Date Delivered, you may print this report and use it as a tickler for those transcripts you need to complete. Also note that a Green Checkmark will appear on the Table of Invoices when the Date Delivered has been omitted.

**Leave Report:** This report is informational only and is useful in keeping track of their leave available or used for those reporters who are under the Leave Act.

Client List: This report prints a list of Clients with address and phone numbers.

# BACKING UP & RESTORING

One thing that cannot possibly be stressed enough is the IMPORTANCE of keeping current backups of your WinUSR<sup>TM</sup> data. A few seconds spent after inputting valuable information can save hours of heartache and extra work in trying to reconstruct your data.

For this reason, a very unique backup system, not directly part of WinUSR<sup>TM</sup>, is provided. For this reason, if something should happen and you're not able to run WinUSR, your data is still safe and can be restored without running WinUSR<sup>TM</sup>.

If you click the **Start** button in the lower left-hand corner of your screen, above Programs you will see both WinUSR and Backer listed. This Backer utility can be used to both back up and restore your data. Though you can back up your data from the Maintenance section of *Win*USR<sup>™</sup>, it is still a better practice to use this Backer utility to back up and restore. It is absolutely the only way to restore your data, as when *Win*USR<sup>™</sup> is open, you cannot restore your data.

Start Backer, as described above, by clicking on the **Start** button and then clicking on Backer. You will see the following screen.

#### BACKING UP YOUR DATA

🥮 Win	USR Backup/	Restore Uti	ility Las	t Backup:	5:24PM on 11/07/	/2004	
File	Backup	Log					
EXIT	BACKUP	RESTORE	LOG FILE				
e:							

Click on the **Backup** button and the following screen will appear.

🥮 Back Up Data		
Drive to backup to	);	
C Drive /	A	
C Drive I	Θ	
<ul> <li>Other</li> </ul>	Drive F	
Networ	'k drives should be "mapped" to this drive letter	
Path (optional):	WINUSR\ ±	1
	(for example: \BACKUP\)	
	🔽 Compress Data Files	
	<u>Start</u> <u>Cancel</u>	

Place a diskette in Drive A, accept all of the defaults on the Back Up Data screen, and press the **Start** button. After completion, close Backer and keep your diskette or storage device in a safe place for later retrieval if necessary.

Press the **Continue** button, and your data will be compressed and stored on your diskette. Mark the diskette with the date and time of backing up and store it in a cool, dry place in case you need it in the future. It is always best to rotate your backup diskettes. It is suggested that you use three diskettes, and always use the oldest one to back up your data so that you have three generations of backups in case of a disastrous happenstance.

#### **RESTORING YOUR DATA**

Click the **Start** button in the lower left-hand portion of your screen and select Backer above the Programs area. Then click on the **Restore** button, and the following screen will appear.

🗮 Restoring Data	
Restore FROM Restore TO	
Drive To Use C Drive A C Drive B C Other Drive F Network drives s	- should be "mapped" to this drive letter
Path to restore FROM:	(For example: \BACKUP\)
☐ Select Place disk 1 in the drive - all su A warning will be given if one of restore process must not be in Last B:	t which files to restore bsequent disks must be from the same "set". Them is found to be from the wrong set. The terrupted! ackup Set: 5
<u>D</u> isk Info	<u>S</u> tart <u>C</u> ancel

Press the **Start** button, and the restoration process will begin automatically. After restoration, you can restart Win USR<sup>TM</sup> or continue with other work.

\* \* \* \* \*

- 1.
- 2.
- 3.
- .
- 4.
- 5.
- 6.
- 7.
- ...
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
- 20. 1.
- 22.
- 23.
- 23.
- 24.

Please contribute to this section via email. This section is intended to be for tips in the use of the program as it stands, and recommendations for enhancements, et cetera, should be conveyed separately. Send your suggested tips and techniques to <u>Support@WinUSR.com</u>, and we'll include them in future editions of this manual. We will mention your name as the author/tipster unless you say otherwise.