User Guide

Indiana Court Templates & Managing Headers for Microsoft Word

Introduction

This guide provides an overview for how to configure and use the Indiana Court Template for transcribing both appeal and non-appeal transcripts. It also includes a section on creating and managing headers in your transcript.

Installing and Starting a Template

One of the purposes of a well-designed template is that it gives you the ability to use time-saving macros. As such, it is important to install and start the template properly so that your document is appropriately macro-enabled.

Prior to installing your template, we recommend you set up a Template Library in your directory, in which to save the various templates and version upgrades as they are released.

To correctly install your template, do the following:

- Download your selected template from the TRX Website -- HERE
- The download will be a zipped file and will contain several documents such as the template, a summary macro sheet, etc.
- Right click on the zip file and select "extract…" to start the unzipping process
- Once extracted, save the newly created folder to a safe location on your computer

When you are ready to use the template, just double-click on it to open it in a document and begin typing. Be sure to save your newly opened document to an appropriately named file to ensure you don't accidentally lose it.

The Macros

Once the new transcript document is opened, the user can initiate any of the macros assigned to it. Macros may vary slightly from one template to another. You can quickly access the list of available macros by pressing Ctrl + M from anywhere in your document.

For your convenience, the macro list also is published in the Appendix to this User Guide.

The Templates

The templates contain all the required formatting and styles to ensure a consistent layout for each of the various types of proceedings. Templates set basic parameters such as margins, fonts, line numbering and pagination.

There are various fields, called placeholders, located in the template. A placeholder contains the title of the information that is required. For example, the cover page has a placeholder in the heading called [COURT TYPE AND NAME] (see screenshot below).

```
                    IN THE [COURT TYPE AND NAME]


[PARTY 1 NAME] ,                )
                                )     No.  [Case No.]
               [Party 1 type] ,)
```

When you position your cursor in the placeholder it will be highlighted. As soon as you start typing, the placeholder is removed and replaced by the text that you type.

The Non-Appeal Template

The Non-Appeal Template includes four sections:

1. Cover Page
2. Index Page
3. Body of the Transcript
4. Certification Page

1. The Cover Page

The cover page has placeholders for the various blocks of information that describe the case and the participants. It contains information such as the case caption, case numbers, name of the judge or hearing officer and the representing attorneys' names and addresses.

2. The Index Page

The Index page provides information such as witness names, miscellaneous events and their associated volume and page numbers.

- Witnesses
  - This list is split into 2 sections. The first section is a list of witnesses for the prosecuting party and the second section is a list of witnesses for the defense.
  - There are placeholders for witness names and volume / page number references for four examination types – Direct, Cross, Redirect and Recross.
- Miscellaneous:
  - This list references specific events that occur. There are placeholders to describe the events and their associated volume / page numbers.
- Exhibits:
  - The Exhibits list includes placeholders for party types, exhibit numbers, descriptions and their associated volume / page numbers.

3. The Body of the Transcript

The body of the transcript is the record of events taking place as the case proceeds. This is where macros have the most benefit because they reduce the entry of repetitive text and ensure that correct formatting is applied.

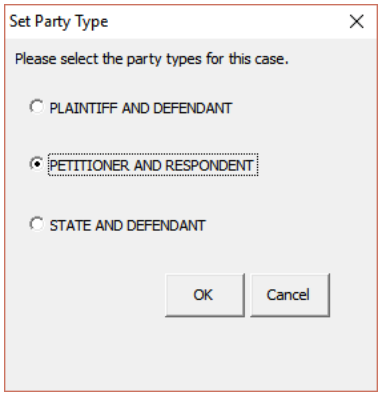
For example, the macro (Alt + C) enters the speaker ID for the Court whenever the Judge is speaking (see screenshot below).

```
1    (Proceedings commence at 9:00 a.m.)
2        THE COURT:  Good morning.
3        |
```

Another type of macro (Alt + Shift + P) will set or change the party types in the case. Once the party types are set, then other macros can be used to enter information based on the party types.

For example:

Alt + Shift + P allows you to set or change the party types in the case.



lCtrl + O then enters the prosecuting party type you selected (i.e., Plaintiff, Petitioner, etc.) and Alt + D enters the defending party type you selected (i.e., Defendant, Respondent, etc.).

```
1      (Proceedings commence at 9:00 a.m.)
2          THE COURT:  Good morning.
3          THE PETITIONER:  Good morning, Your Honor.
4          THE RESPONDENT:  Good morning.
```

The Appeal Template

The Appeal Template includes five sections:

1. Volume Cover Page
2. Day Cover Page
3. Appearances Page
4. Body of the Transcript
5. Certification Page

1. The Cover Pages

The Appeal Template has two cover pages, one for the transcript volume (Volume Cover) and one for the hearing date (Day Cover) . These cover pages also have placeholders for various blocks of information that describe the case and the participants.

2. The Appearances Page

The appearances page contains information about the parties who are present at the proceeding being recorded, including party types, parties' names, firm names, addresses, phone numbers and email addresses.

3. The Body of the Transcript

As with the Non-Appeal Template, the body of the transcript is the record of events taking place as the case proceeds and is where macros have the most benefit because they reduce the entry of repetitive text and ensure that correct formatting is applied.

To see examples of macros used in the body of the transcript, go to “The Non-Appeal Template” above, section “3. The Body of the Transcript”.

4. Certificate Page

Only on the last Volume of an Appeal transcript.

The Table of Contents Template

The Table of Contents Template has two macros specific to it. One macro creates a new Table of Contents page when needed and the other macro creates a new Exhibits page. These macros may be employed by one of two methods, as follows.

1. The keyboard shortcut:

- To create a new Table of Contents page, use (ctrl + shift + w)
- To create a new Exhibits page, use (ctrl + shift + x)

2. The Macro buttons available in the MS Word Quick Access toolbar:

- To create a new Table of Contents page, use this macro button image

- To create a new Exhibits page, use this macro button image

The Table of Contents Template includes three sections:

1. Cover Page
2. Table of Contents Page
3. Exhibits Page

1. The Cover Page

The cover page has placeholders for the various blocks of information that describe the case and the participants. It contains information such as the case caption, case numbers, name of the judge or hearing officer, volume and page numbers, and the representing attorneys' names and addresses.

2. The Table of Contents Page

The Table of Contents page provides information such as witness names, miscellaneous events and their associated volume and page numbers.

- **Witnesses:**

  o This list is split into 2 sections. The first section is a list of witnesses for the prosecuting party and the second section is a list of witnesses for the defense.

  o There are placeholders for witness names and volume and page number references for five examination types – Direct, Cross, Redirect, Recross and Voir Dire.

- **Miscellaneous:**

  - This list references specific events that occur. There are placeholders to describe the events and their associated volume and page numbers.

As noted above, a new Table of Contents page can easily be created with the (ctrl + shift + w) macro, or by clicking the macro button in the Quick Access toolbar.

3. The Exhibits Page

The Exhibits page includes placeholders for the hearing date(s) and type(s), party types, exhibit numbers, descriptions and the volume and page numbers where the exhibits are identified and received into evidence.

As noted above, a new Exhibits page can easily be created with the (ctrl + shift + x) macro, or by clicking the macro button in the Quick Access toolbar.

The Certification Page

There is a Reporter's Certification page included within each of the appeal and non-appeal templates.

If you are going to use the certification page in this volume, it can be filled out accordingly. If you are not using the certification page in this volume, it can be deleted.

APPEAL CERTIFICATE PAGE:

```
STATE OF INDIANA          )          [NAME OF COURT]
                          )
COUNTY OF [COUNTY NAME]   )          CAUSE NO.: [CAUSE NO.]


[PARTY 1 NAME] ,                )
                                )
              [Party 1 type] ,)
                                )
          vs.                   )
                                )
[PARTY 2 NAME] ,                )
                                )
              [Party 2 type] .)
```

REPORTER'S CERTIFICATION

I, [Court Reporter's Name, Cert #] , Official Court Reporter of the [COURT NAME] [CIRCUIT / COUNTY] , do hereby certify that I am the Official Court Reporter of said court, duly appointed and sworn to report the evidence of causes tried therein by means of digital recording, and that as the Court Reporter, I recorded all the evidence given during the above-captioned hearing beginning on the [DATE] day of [MONTH] , [YEAR]

I further certify that the foregoing transcript was transcribed by [TRANSCRIBER NAME] , a certified transcriptionist, from the digital recording of said evidence given on said dates, and that I undertook and completed a review and comparison of the transcript prepared by [TRANSCRIBER NAME] with my record of the trial.

I further certify the foregoing transcript, as prepared, is a full, accurate, correct, and complete transcription of all matters contained in the recorded proceedings.

WITNESS MY HAND AND SEAL THIS [#] DAY OF [MONTH] , [YEAR]

_____

[Name of Court Reporter]
Official Court Reporter
[COURT NAME]

NON-APPEAL CERTIFICATE PAGE:

CERTIFICATION

I, "[Court Reporter's Name, Cert #]", a court approved [transcriptionist/proofreader], do hereby certify that the forgoing is a correct transcript from the official electronic sound recording of the proceedings in the above-entitled matter, to the best of my professional skills and abilities.

"[COURT REPORTER'S NAME]", [CERT #] [DATE]
Official Court Reporter

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Managing Headers

Introduction

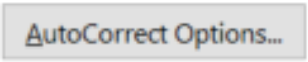
This guide provides an overview for how to manage headers in Microsoft Word. In 2016, the Indiana Court Reporter's Handbook was updated to include the rule regarding headers in transcripts (APPENDIX G - Appendix A. Standards for Preparation of Electronic Transcripts).

- The Court Reporter shall note in boldface capital letters at the top of each page where a witness' direct, cross, or redirect examination begins.
- Header notations of other types of persons and/or events are permitted but not required.
- Listing the last name of the witness or other party and the type of examination or other event is sufficient.

It is recommended that you complete the transcript, including all its internal format elements, proofing and spell-checking, etc. and ONLY THEN go back to deal with the sections / headers. The process of setting of section breaks and headers can get much more confusing as text is added, removed, etc. So these headers usually should be your LAST step.

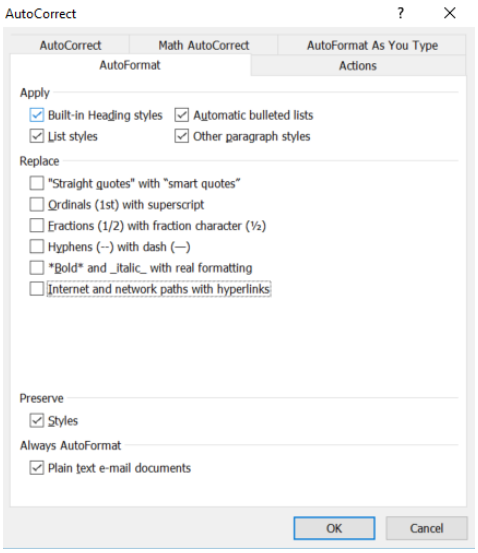
Additionally, MS Word's default settings include several options you should turn off to avoid confusion. If these settings are not disabled you may have some odd formats. To disable these options:

- Click on the File button in the MS Word toolbar
- Open the Options menu
- Select Proofing from the menu on the left
- Select the AutoCorrect Options… button



- Once the AutoCorrect window opens, switch to the AutoFormat tab and uncheck the following boxes under Replace:
    - "Straight quotes" with "smart quotes"
    - Ordinals (1st) with superscript
    - Fractions (1/2) with fraction character (1/2)
    - Hyphens (--) with Dash (--)
    - *Bold* and _italic_ with real formatting
    - Internet and network paths with hyperlinks

(See screenshot below)

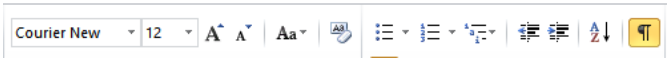


Create Section Break

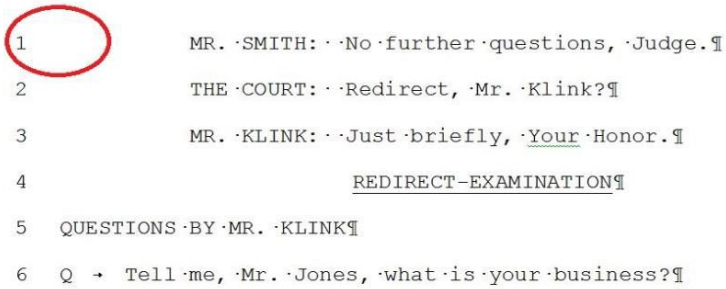
In order to apply different headers to different pages within a document, we need to create "Section Breaks." Section break instructions are detailed below. It is very important to perform these functions in exact order.

1. Display Hidden formatting. When working with section breaks, it's easier if you display the hidden characters in Word. By default, these breaks are hidden, which makes it nearly impossible to create and manage section breaks. You can display hidden characters one of two ways.

- By using the keyboard shortcut: (ctrl + shift + *)
- By using your mouse: In MS Word, click the Home tab, then click the Paragraph button in the toolbar (see image below)

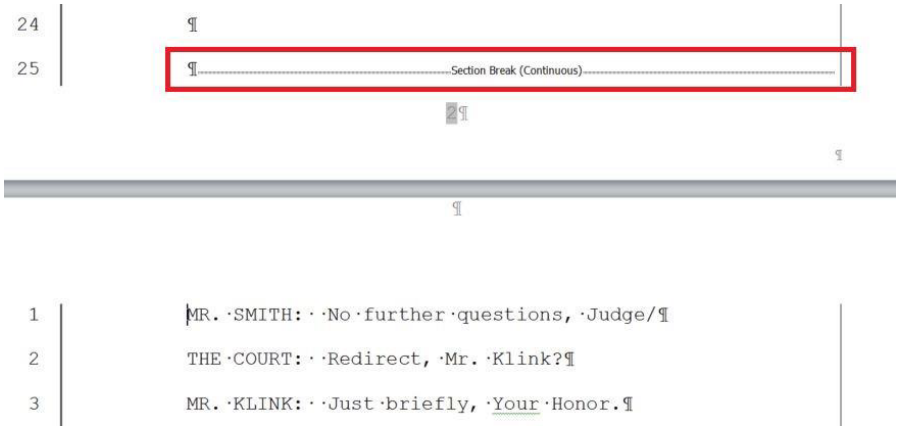


2. Place your cursor at the first typable location of the page on which the new header needs to be included (note that hidden formatting is displayed).



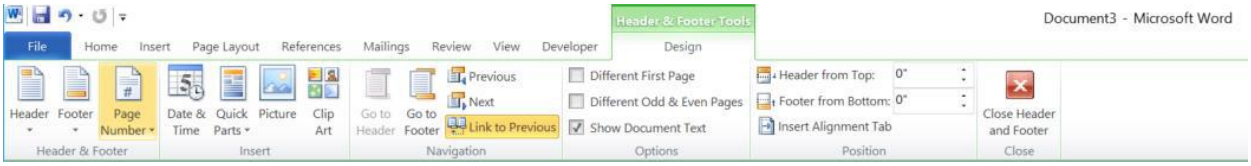
3. Insert Section Break. Select Page Layout tab, then click the Breaks dropdown options. Select Continuous from the dropdown selection list.

4. The new section break is inserted at the very end of the previous page (see screenshot below). This break allows for different formatting between these pages, specifically the header.

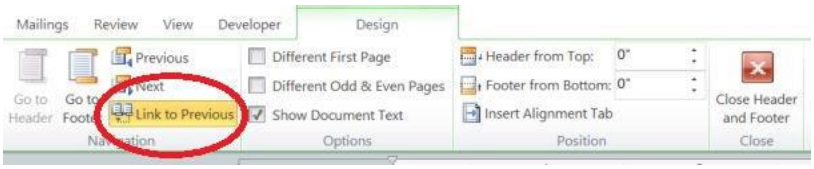


Adding Header Text

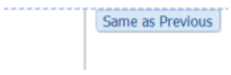
5. Next, to create the header itself, double-click anywhere in the header area to bring up the Header/Footer toolbar.



6. IMMEDIATELY unclick the Link to Previous button.



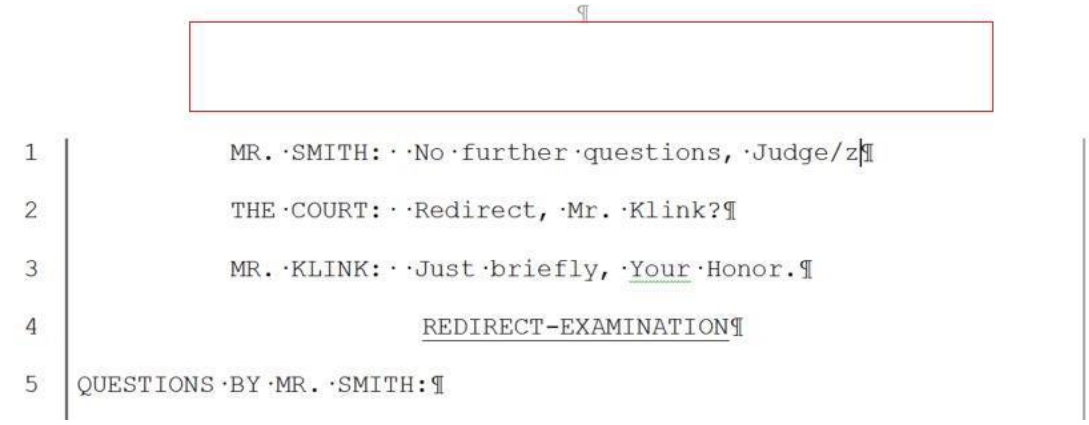
The words Same as Previous, in the area just below and to the right of the header box (shown in the screenshot below), should disappear.



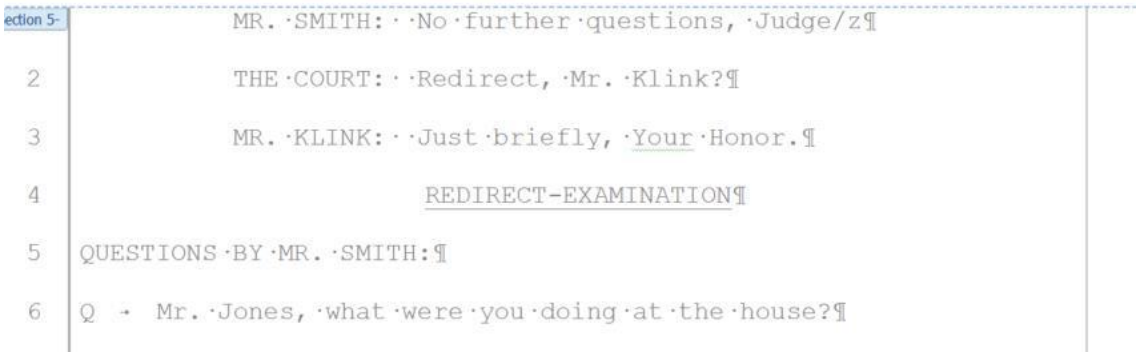
ONLY NOW begin to type your new header. If you begin typing BEFORE you unclick the Link to Previous button, you will UNDO PRIOR HEADERS in your document.

****If that happens, use the Undo button****

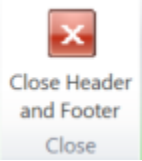
7. To enter text in a header, simply double click into the empty header space at the top of the page.



8. Once in the Header & Footer edit mode, you can enter the specific text for your header. In the screenshot example below, the header is "SMITH – REDIRECT".



9. When finished, exit the Header & Footer edit mode either by clicking the Red 'X" in the MS Word toolbar (see image below), or by double-clicking into the text portion of the transcript.



10. This newly created header now applies to this page and every page after. To change the header on following pages, the same process is applied. To remove the header from a page, place your cursor anywhere on the page, then continue to follow the process from instruction #3.

If you have any questions, comments or concerns, you can always contact our team directly at customersuccess@trxchange.net.

Appendix

Macros:

Alt + A	A
Alt + C	THE COURT:
Alt + B	THE BAILIFF:
Alt + Shift + C	(Counsel confer)
Alt + D	THE DEFENDANT/RESPONDENT:
Alt + E	End of Proceedings
Alt + F	Type of EXAMINATION
Alt + G	Media Played/Ended
Alt + Shift + G	Media End Time
Alt + H	Your Honor
Alt + I	Enter Time of Indiscernible
Alt + J	Enter Lawyer for Plaintiff (LAWYER1)
Alt + K	THE CLERK:
Alt + L	Enter Lawyer for Defendant (LAWYER2)
Alt + M	Toggles Q and A with Quoted Q and A
Alt + N	Shows Quoted Material Information
Alt + O	Off The Record
Alt + P	(Pause)
Alt + Shift + P	Set Party Types
Alt + Q	Q
Alt + R	Time of Recess
Alt + Shift + R	End of Deposition reading
Alt + S	Swear-In Form
Alt + Shift + S	[PARTY TYPE] RESTS
Alt + T	Jury Sworn
Alt + U	Uh-huh (yes)

Alt + V	Enter Juror ID
Alt + W	THE WITNESS:
Alt + Shift + W	(Party reviews document)
Alt + X	EXHIBITS
Alt + Y	Jury In
Alt + Shift + Y	Jury Present
Ctrl + A	A Yes. (return)Q
Ctrl + B	Enter Sidebar Times
Ctrl + D	Q Okay.
Ctrl + E	A That's correct. (return)Q
Ctrl + H	§ (section symbol)
Ctrl + I	A Correct. (return)Q
Ctrl + J	BY MR. LAWYER1:
Ctrl + K	(Phonetic)
Ctrl + L	BY MR. LAWYER2:
Ctrl + M	Shows Macro Key List
Ctrl + O	THE PLAINTIFF/PETITIONER:
Ctrl + R	Deposition Reading Begins
Ctrl + Shift + R	Deposition Reading Continued
Alt + Shift + R	Deposition Reading End
Ctrl + U	Huh-uh (no)
Ctrl + W	Witness reviews document
Ctrl + Y	Jury Out Form
Alt + [	Change MR. LAWYER1:
Alt +]	Change MR. LAWYER2:
Alt + 1-5	Set Speaker IDs Form
Alt + Shift + 1-5	Set Additional Speaker IDs
Ctrl+Shift+W	Create new Table of Contents Page – Table of Contents Template
Ctrl+Shift+X	Create new Exhibits Page – Table of Contents Template