



Partner Portal NEXT

TUTORIAL GUIDE

Confidential

Q2 – 2020 – V.2

Introduction

As part of our dedicated commitment to the reporters, videographers, agencies and interpreters that we work with, Veritext strives to continue to develop and improve our technological offerings to best support our partners.

The goals of the Veritext Partner Portal re-design were to improve the platform's stability, enhance the user experience by simplifying workflow and to introduce new features that will strengthen your ability to provide quality service.

In addition to these design enhancements, the re-designed foundation of the portal will allow us to more easily implement new features and updates. The Partner Portal will continue to develop substantially in the months and years to come and we look forward to offering new modules and enhancements that will provide an even more positive and defining experience for the partners we work with.

We are very grateful to the reporters, videographers and team members that worked tirelessly, in close collaboration to make this re-design possible and are very thankful for the meaningful relationships we share with our partners across the country.

Support

Video tutorials, helpful tips, FAQ information and additional supporting documentation are available via the **"Help"** and **"Tutorial"** sections of the portal which may be accessed by clicking the icons on the top right of the Partner Portal.

When submitting an e-mail ticket to the Veritext Partner Portal Support team, please include as much detailed information as possible. It will be much easier for the team to provide you assistance if you can provide specific information regarding the issue. Vague or unclear inquiries will take much longer to resolve. Please include the following information in your e-mail (when available):

- Assignment number
- Include the specific nature of your inquiry in the subject line
- Include "URGENT" in the subject line for urgent matters
- A detailed description of the issue, including the assignment number if applicable
- Include screenshots of the issues when possible

E-mail Support: TechServices@veritext.com

Phone Support: 866-642-9574 (Option 2)

Contact your local office for general questions that aren't technically specific.

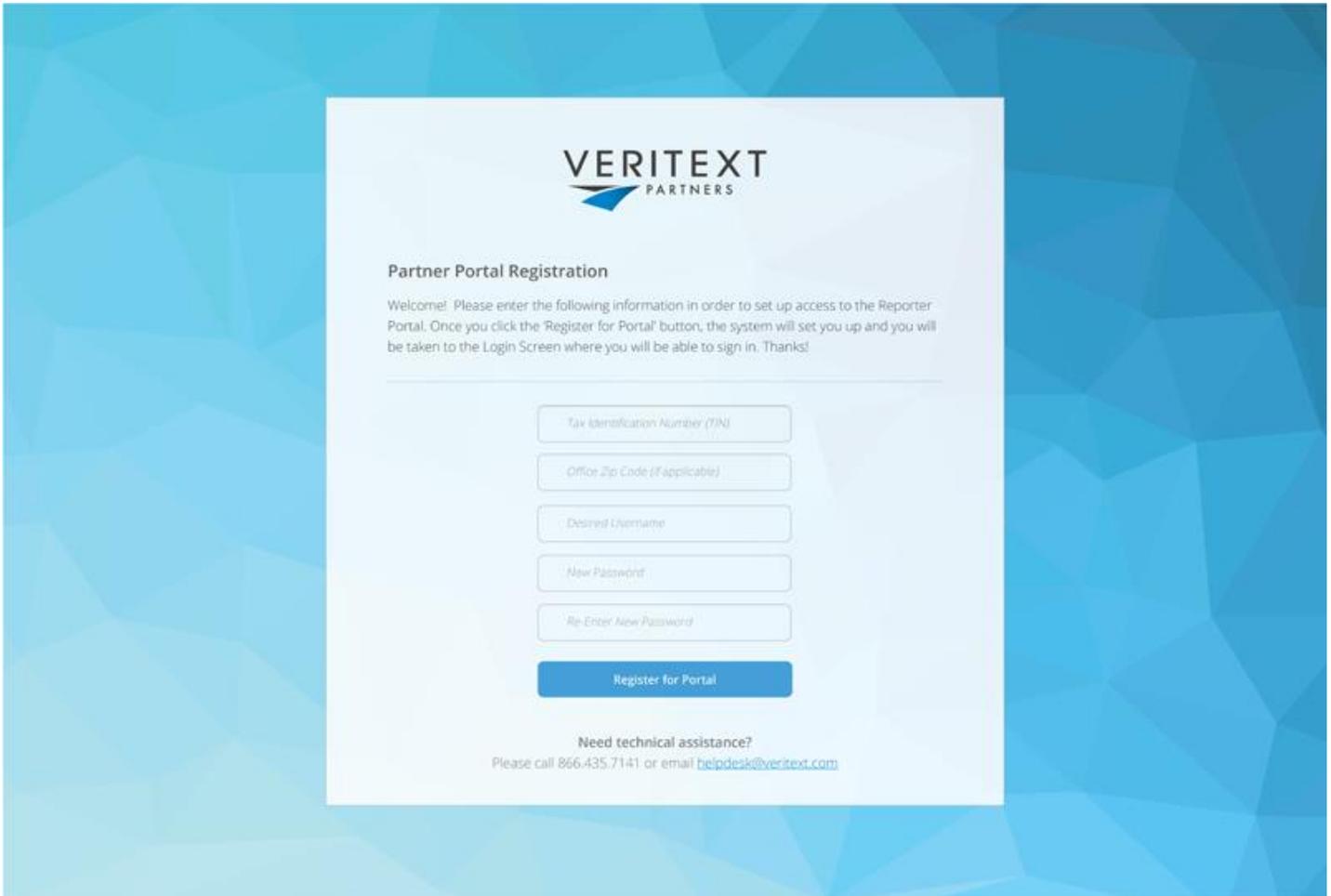


Table of Contents

- INTRODUCTION 1**
- SUPPORT 1**
- CHAPTER 1 – CREATING AN ACCOUNT..... 3**
- CHAPTER 2 – THE DASHBOARD 4**
 - 1. PARTNER NEWS 4**
 - 2. YOUR JOBS..... 5**
 - 3. ASSIGNMENT DETAILS/PROGRESS STATUS 6**
 - 4. CALENDAR..... 6**
 - 5. SEARCH 8**
 - 6. USER MENU..... 8**
- CHAPTER 3 – REVIEWING AN ASSIGNMENT..... 9**
- CHAPTER 4 - SUBMITTING AN ASSIGNMENT..... 10**
 - 1. ROUGHS 10**
 - 2. WITNESSES..... 11**
 - 3. ATTORNEYS PRESENT..... 12**
 - Duplicate Appearances 15**
 - “PRINT” ATTORNEYS PRESENT..... 16**
 - 4. ORDERS..... 17**
 - 5. REVIEW ALL ORDERS & SEND 20**
 - 6. FILES..... 23**
 - EXHIBIT STICKERING TOOL 24**
- CHAPTER 5 – FINANCIALS..... 26**
- CHAPTER 6 – MOBILE 27**

CHAPTER 1 – Creating an Account

- Navigate to www.veritext.com and select “Log on to Partner Portal” on the top right
- Select “Click here to register”
- Enter the desired username, password, Tax ID/Social Security Number.
- Select “Register for Portal”.
- Google Chrome is the recommended web browser for the Veritext Partner Portal



The screenshot shows the Veritext Partners Partner Portal Registration page. The page has a blue geometric background. At the top center is the Veritext Partners logo. Below the logo is the heading "Partner Portal Registration". A welcome message reads: "Welcome! Please enter the following information in order to set up access to the Reporter Portal. Once you click the 'Register for Portal' button, the system will set you up and you will be taken to the Login Screen where you will be able to sign in. Thanks!". Below the message is a registration form with five input fields: "Tax Identification Number (TIN)", "Office Zip Code (if applicable)", "Desired Username", "New Password", and "Re-Enter New Password". A blue "Register for Portal" button is positioned below the fields. At the bottom of the form, there is a link for technical assistance: "Need technical assistance? Please call 866.435.7141 or email helpdesk@veritext.com".

CHAPTER 2 – The Dashboard

The re-designed Dashboard provides an easily understandable overview of all your current, upcoming and historical activities with Veritext. More detailed information regarding assignments can be accessed by clicking a blue case name, anywhere on the site and a list view of your assignment can be easily accessed by clicking a category in the center of the page.

The screenshot shows the Veritext Partner Portal Dashboard. At the top left is the 'PartnerPortal' logo. To its right is a search bar with the text 'Search or Enter a Job #' and a red circle containing the number '5'. Further right is the user name 'Hi, AndyFredericks!' and a profile icon with a red circle containing the number '6'. Below the search bar is a blue navigation bar with 'Dashboard' on the left and a 'News' toggle switch on the right, which is currently turned on and has a red circle containing the number '1'. The main content area features a row of five news cards. Below this is a 'Your Jobs' section with a list of job entries, each with a status indicator (e.g., 'Confirmed') and a progress bar. To the right of the jobs is a calendar for 'November 2019' with a 'Filters' section below it containing checkboxes for 'Job', 'Unavailable', and 'Limited Availability'. A red circle containing the number '4' is placed over the calendar area. A red circle containing the number '2' is placed over the 'Your Jobs' header, and a red circle containing the number '3' is placed over the first job entry.

1. Partner News – Stay up to date with industry news, Veritext announcements and upcoming opportunities. During the Beta test we will communicate updates, fixes and important information.

You can toggle the News display on and off using the slider at the top-right:

Display On:

This screenshot shows the dashboard with the 'News' toggle switch in the top right corner turned on (green). A red arrow points to the toggle switch. The rest of the dashboard content, including the 'Your Jobs' section and the calendar, is visible below.

Display Off:

This screenshot shows the dashboard with the 'News' toggle switch in the top right corner turned off (grey). A red arrow points to the toggle switch. The rest of the dashboard content is visible below.

2. Your Jobs – All the jobs you are assigned to, divided by assignment category. If you have multiple jobs, the number of jobs will be represented in the parenthetical. Clicking a category will redirect you to a list view displaying jobs that fall within that category. Options for sorting the display are available in the **Sort By** menu. **You can see more complete details of the assignment by clicking the blue linked job info (required to understand full assignment details).**

Dashboard

Your Jobs

Sort By: Due Date (Oldest First)

- To Accept (0)
- Upcoming (0)
- Due Now (8)**
- In Progress (3)
- Back Ordered (0)
- Completed (41)
- Canceled (0)

Job Title	Company	Status	Job Date	Due Date	Service Performed	Witness	Orders	Exhibits	Files	Invoices
In Re: Partner Portal Testing ...	Norton Rose Fulbright US LLP	Confirmed	09/17/2019 @ 9:00 AM	09/19/2019	●	●	●	●	●	●
Demo Company vs. Test Org...	Cain & Skarnulis, PLLC	Confirmed	09/21/2019 @ 10:00 AM	09/25/2019	●	●	●	●	●	●
In Re: Partner Portal Testing ...	Norton Rose Fulbright US LLP	Confirmed	09/23/2019 @ 9:00 AM	09/26/2019	●	●	●	●	●	●
In Re: Partner Portal Testing ...	Norton Rose Fulbright US LLP	Confirmed	09/19/2019 @ 9:00 AM	10/03/2019	●	●	●	●	●	●

To Accept Jobs - Select the **To Accept** assignment category from **Your Jobs**. **Accept** or **Decline** assignments by clicking the buttons, respectively. Additional information regarding the assignments can be accessed by selecting the blue linked job info.

Your Jobs

Sort By: Due Date (Oldest First)

- To Accept (5)**
- Upcoming (0)
- Due Now (0)
- In Progress (0)
- Back Ordered (0)
- Completed (102)
- Canceled (15)

Job Title	Company	Status	Job Date	Due Date	Service Performed	Witness	Orders	Exhibits	Files	Invoices
Demo Case, et al. vs. Trial Ca...	Gibson Dunn & Crutcher LLP	Scheduled	10/28/2019 @ 9:00 AM	11/04/2019	Court Reporter					
Demo Case, et al. vs. Trial Ca...	Cleary Gottlieb Steen & Hamilton, LLP	Scheduled	10/22/2019 @ 9:00 AM	11/05/2019	Court Reporter					
Demo Case, et al. vs. Trial Ca...	Cleary Gottlieb Steen & Hamilton, LLP	Scheduled	10/23/2019 @ 9:00 AM	11/06/2019	Court Reporter					
Demo Case, et al. vs. Trial Ca...	Paul Weiss Rifkind Wharton & Garrison, LLP	Scheduled	10/30/2019 @ 9:00 AM	11/11/2019	Court Reporter					

3. Assignment Details/Progress Status – The basic information for the jobs in the selected assignment category will display, along with the job’s Progress Status.

In Re: Partner Portal Testing ...

Norton Rose Fulbright US LLP
 VD 3531164 - **Confirmed**
 Job Date: 09/17/2019 @ 9:00 AM
 Due Date: 09/19/2019

Service Performed	Witness	Orders	Exhibits	Files	Invoices
Court Reporter	●	●	●	●	●

Explanation of Work in Progress Statuses			
	In Progress	Due Now	Complete
Witness	Day of Job Onward	On Due Date & Past Due Date	Witness Saved
Orders	Day of Job Onward	On Due Date & Past Due Date	Job Sent
Exhibits	Day of Job Onward	3 business days after the assignment or earlier if expedited	Exhibits Uploaded
Files	Day of Job Onward	On Due Date & Past Due Date	Job Sent with Files
Invoices	Day of Job Onward	After Due Date (IC) After Due Date (Agency)	First Invoice Billed (IC) Invoice Uploaded (Agency)

4. Calendar – a new view in PortalNext, the Calendar displays Jobs and Availability (depending upon release; may not be available for all users).

A
B

October 2019

C
D

<
ADD TIME OFF
>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10 9a VD 3581156	11 9a VD 3581159	12
13	14 10a VD 358126	15 10a VD 358126	16 Catching Up c	17	18 11a Doctors A	19
20	21 	22	23 Family is goin	24	25 6p Doctors Ap	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

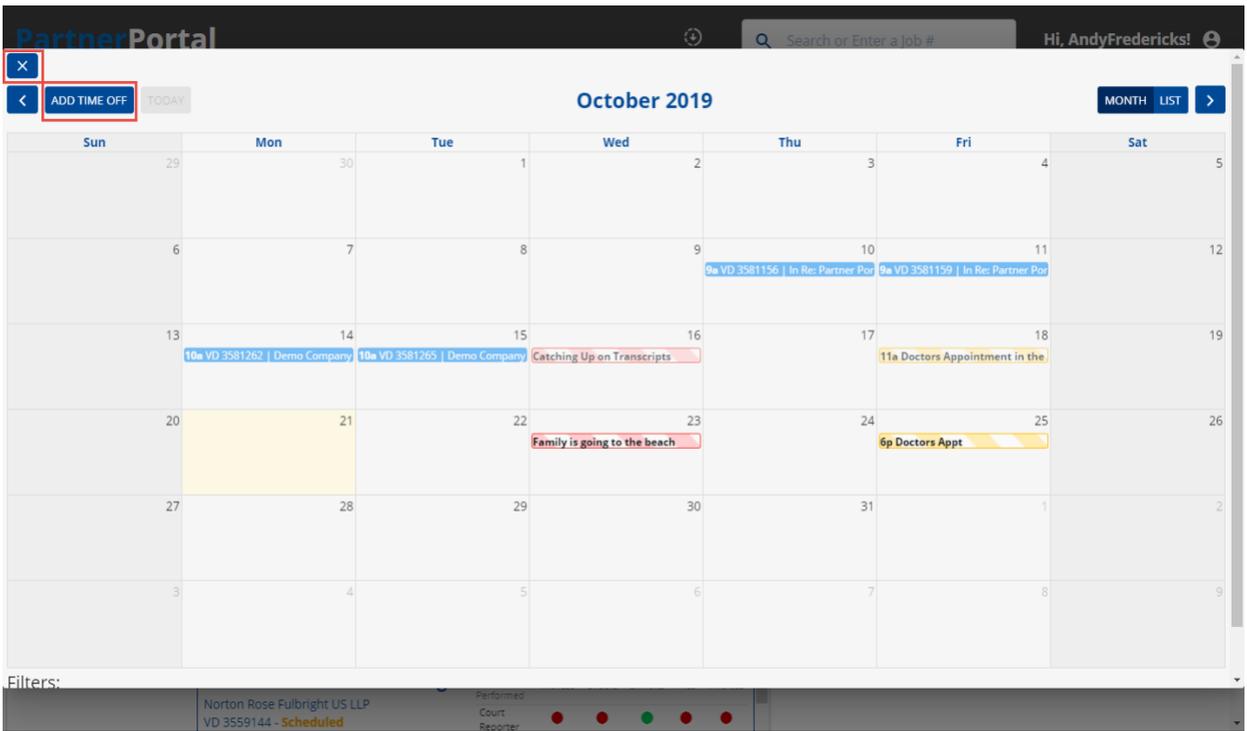
Filters: E

Job

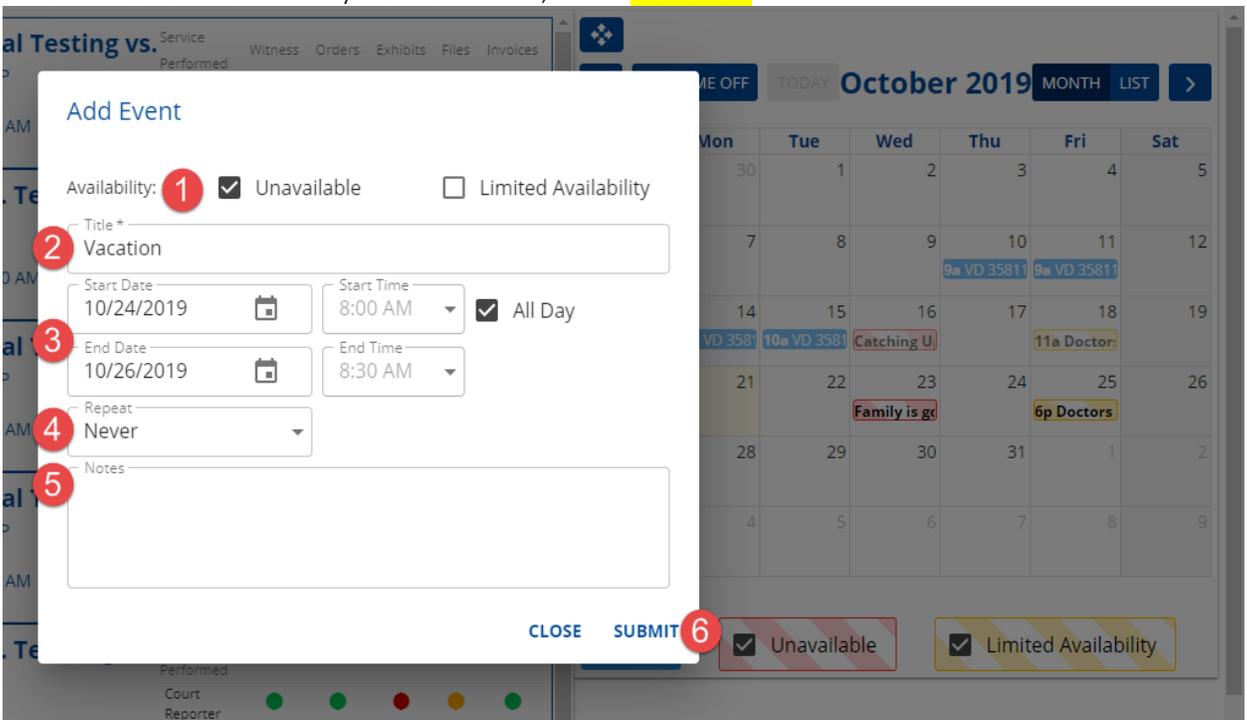
Unavailable

Limited Availability

- a. **Expand** - change to full screen mode using the four-pointed arrow. Close using the “X” button.



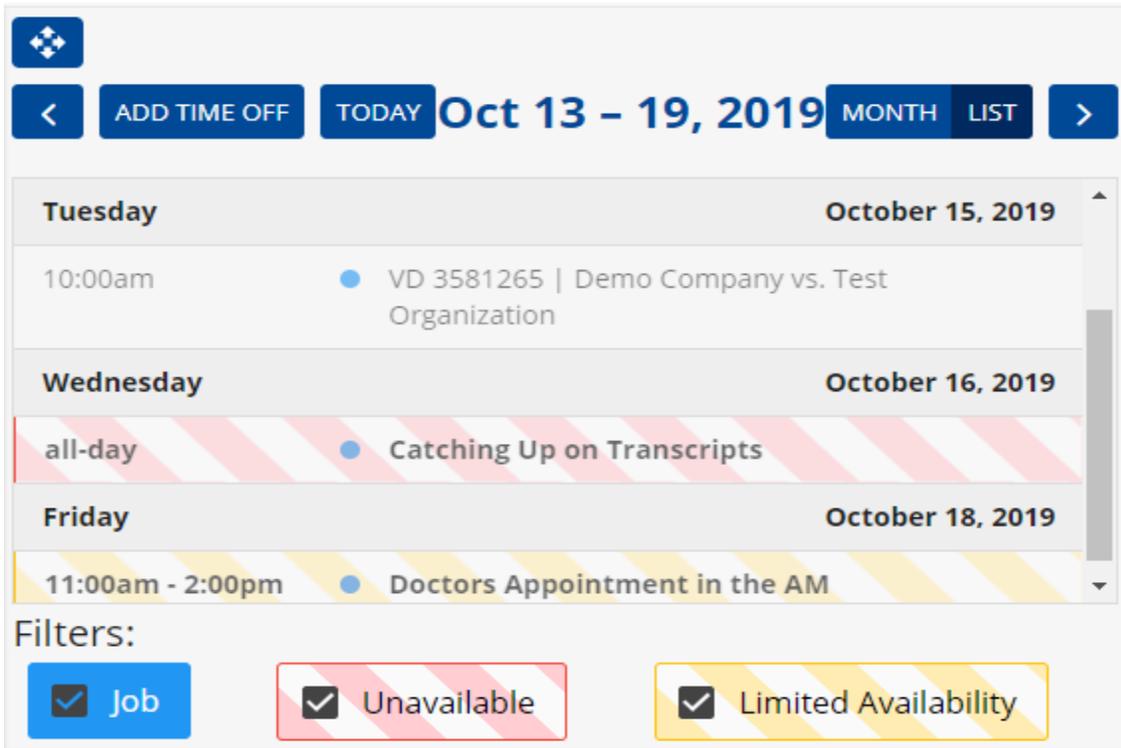
b. **Add Event** - to add Availability to the Calendar, select **Add Event**.



1. Select the applicable Availability category: **Unavailable** = unable to work at all; **Limited Availability** = may be able to take an assignment if it meets specified criteria (e.g. job must end by 2 PM).
2. Enter **Title** description of event.
3. Enter **Date Range**. **All Day** is selected by default; uncheck to enable time editing.
4. Select **Repeat** occurrence if you'd like to enter a reoccurring event.
5. **Submit** to save.

c. **Scroll** - use arrows to navigate between date ranges.

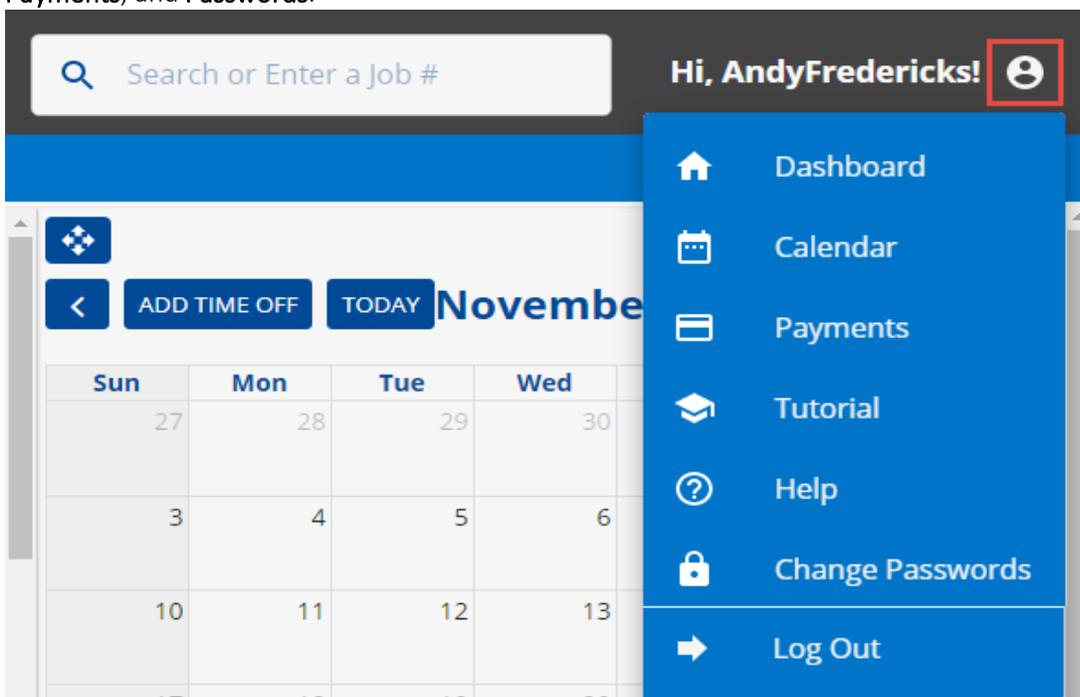
d. **View** - switch between **Month View** (displayed above) and **List view** (below):



e. **Filters** - Check or uncheck Filters to hide/show Event categories.

5. **Search** - enter search term or job number to navigate to specific jobs.

6. **User Menu** - select the user Icon to display additional menu options, including **Tutorial/Help** resources, **Payments**, and **Passwords**.



Chapter 3 – Reviewing an Assignment

Whenever you click a Case Name or Job Number from anywhere in the portal you will be taken to the **Assignment Details** page. Assignment details contain all the information needed to perform the assignment and houses all the processes for turning in and completing the assignment (See “**Assignment Details – Turn In**” below).

The screenshot displays the PartnerPortal interface for a specific assignment. At the top, there is a search bar and a user profile for 'Hi, AndyFredericks!'. Below this is a navigation bar with 'Dashboard / Job # 3196148' and a 'REVIEW ALL ORDERS & SEND' button. The main content area is titled 'Demo Company vs. Test Organization | VD 3196148' and contains several sections:

- Job Status:** Confirmed
- Vendor Status:** Court Reporter, Accepted
- Job Date:** 01/14/2019 @ 9:00 AM PDT
- Due Date:** Expedited due on 01/17/2019
- Case Information:** Venue: Federal
- Location:** Veritext - Los Angeles, CA, 707 Wilshire Blvd Suite 3500, Los Angeles, CA 90017, 213-623-5005. Includes a 'Get Directions' link.
- Services:** Conference Call, Realtime, Rough Draft
- Service Providers:** Court Reporter Provided by: You
- Notes:** Public (1) note: 'Rough Draft to: Afredricks@veritext.com; kdodd@veritext.com'. Private (0) notes are also visible.

At the bottom, there is a navigation bar with buttons for 'Roughs' (SEND), 'Witnesses' (ADD), 'Attorneys Present' (ADD), and 'Orders' (ADD).

1. **Job Info** – Basic information regarding the assignment, including Status, Job Date, and Due Date. Expedited job delivery will appear in red. If you’ve not yet Accepted, you can Accept/Decline jobs.
2. **Case Information** – Information regarding the client, case and proceeding.
3. **Location** – Job Location. Select the **Get Directions** link to launch Google Maps.
4. **Services** – Required services for the assignment.
5. **Service Provider** – Partners assigned to the job. This box will show you, and any other partners assigned to the job, e.g., reporters, videographers or interpreters and his/her name.
6. **Notes** – Notes from Veritext regarding the assignment. Add your own notes by clicking **Add** on the top right corner of the box. These notes will be displayed for Veritext staff on the office system as well.
7. **Menu** – Locate additional features:
 - a. **View Financials**
 - b. **Print Job Details**
 - c. **Word Dictionary**
 - d. **Office Info**
 - e. **Transcript Info**

Chapter 4 - Submitting an Assignment

All the steps required to submit an assignment are also located on the assignment details page, under the Assignment Detail cards. Each of the processes (1 – 5 below) are explained in additional detail later in the manual.

The screenshot shows the PartnerPortal interface for Job # 3196148. The top navigation bar includes the PartnerPortal logo, a search bar, and a user profile for Hi, AndyFredericks!. Below the navigation bar, there are four main cards: 'Roughs' (1), 'Witnesses' (2), 'Attorneys Present' (3), and 'Orders' (4). A fifth card, 'Files' (6), is located below the others. The 'Roughs' card has a 'SEND' button. The 'Witnesses' card has an 'ADD' button and lists Jane Doe and Jimmy Stewart. The 'Attorneys Present' card has an 'ADD' button and lists Mr. Charlie Cain and Mary E. Zaug Esq. The 'Orders' card has an 'ADD' button and lists Mr. Charlie Cain and Mary E. Zaug Esq. The 'Files' card has an 'UPLOAD' button and lists four files: 3196148-1.TXT, JobSheet_01142019_231008.pdf, PORTAL GETTING STARTED.PDF, and JobSheet_09032019_203854.pdf. A green button at the top right says 'REVIEW ALL ORDERS & SEND' with a '5' in a red circle next to it.

To edit a card, select the blue button to the right of the title. To close a card, select the “X”.

1. **Roughs** -- The Rough card allows you to upload and email roughs to counsel.
2. **Witness** -- The witness card allows you to add new witnesses by selecting **Add** on the top right corner of the card. You can also edit existing witness information by selecting a witness name.
3. **Attorneys Present** – **Veritext Partners should input any attorney that was present at the deposition as an Attorneys Present.** All “Attorneys” that did not order work product at the time of the proceeding will be automatically e-mailed by Veritext asking if they would like to purchase a copy of the work product at the time it becomes available. Any attendee that is added to the assignment and that has work product associated with it will automatically generate an Order for that attendee.
4. **Orders** – Veritext partners can create, duplicate, edit or delete orders on the orders section of the assignment details page.
5. **Files** – Files that have already been uploaded (by you or Veritext) will be separated into different File Type categories. You can upload files by clicking **Upload Files** on the top-left of the Files card.
6. **Review All Orders & Send** – Once all witnesses, attendees, files and orders have been added, the Veritext Partner should click **Review All Orders & Send** at the top of the page to review all their completed information for one last time and to submit the assignment to Veritext for production and/or billing.

Orders should be submitted in order (1-5), per below:

1. **Roughs** - Sending rough drafts through the Veritext Partner Portal (rather than by e-mail) is an important process that ensures the security of the rough draft file (for both the reporter and client), it’s deliverability to the attorney recipient and ensures that Veritext has a copy of the rough draft and the associated correspondence in the back-office system. It is our recommendation to CC yourself on a rough draft sent through the Partner Portal as a means for you to know the rough draft was sent successfully.

To send a rough, select **Send** at the top-right of the card.

- a. Start typing the email address of the recipient(s) or select from the **Suggested E-mails**. **Separate emails with a comma or semi-colon**. Once you have typed a valid email address and comma/semi-colon/tab, the text will be encompassed in a blue field with an “X” option to delete.



- b. To add the .txt file, select **Upload** at the bottom-right of card. The File Type will default to Rough Ascii. Select a **Witness**. Once the Witness has been selected, drag or Browse to the file location. Repeat for additional witnesses, as needed.
- c. Once the upload is complete, enter any **Notes to Office**, and select a **Designation**, if necessary.
- d. Select **Send** or **Send & Reset Form**.

The screenshot shows the 'Roughs' form interface. At the top left, there is a 'Roughs' header with a close icon. The main form area includes:

- A 'To:' field containing 'kdodd@veritext.com' with a delete 'X' icon.
- A prompt: 'Enter any additional recipient e-mail addresses separated by comma or semicolon'.
- A 'Suggested E-mails:' section with two buttons: 'Brandon Crisp Esq. (brandon.crisp@nortonrosefulbright.com)' and 'Mr. Charlie Cain (ccain@cstrial.com)'.
- A 'Rough ASCIIs' section with a list of files. One file, 'Demo Transcript - Copy.txt' by 'Mariel Dempster', has a checked checkbox.
- A 'Notes to Office' text area.
- A 'Designation' section with three radio button options: 'None' (selected), 'Attorneys Eyes Only', and 'Confidential'.
- A note: 'Rough ASCII Notes to Office (500 Char Max)'.
- A footer prompt: 'Please select at least one rough ASCII file'.
- Three buttons at the bottom: 'UPLOAD', 'SEND', and 'SEND & RESET FORM'.

2. **Witnesses** – To add witness, select “Add” button. To edit witness, select name.
 - a. Select **Venue**.
 - b. Enter/Edit **Witness Info**, if necessary. Select **Expertise**, if applicable.
 - c. **Job Info**:
 - i. If the job was an **Appearance Only**, select the checkbox.
 - ii. Select an option from the **Read and Sign Performed by** dropdown.
 - iii. Enter **Pages**.
 - iv. If there was Wait Time, add to **Hours/Minutes Waited**.
 - v. Enter **Start Time/End Time**.

- d. **Exhibits:** select applicable entry from Dropdown. Include the total **Count** of exhibits, as well as the exhibit **Range** (e.g., 1-15).

3. **Attorneys Present** – All attorneys that were present at the deposition (regardless of ordering work product) should be added to the **Attorneys Present** section. The **Attorneys Present** section should ONLY include attorneys and should NOT include anyone else present at the proceeding.

Adding an attendee with a **Product Ordered** will automatically generate an order for that attendee. Non-ordering attorneys that are added to **Attorneys Present** section will be e-mailed after you have turned in the assignment requesting whether they would like to purchase work product, potentially generating additional copy sales for you.

To add an Attorney Present, select **Add** button. [Copy (to duplicate orders, if applicable) is explained below.]

- a. Start with the attorney's email address, if available. Email address is a unique qualifier that should yield only the correct result. This is especially beneficial when searching large corporations, government agencies, or names that are common.

- b. If email address is unavailable, **Search Law Firms and Attorneys** by typing a name. Building icon represents Law Firm entries. Person icon represents Contact entries.

Use the Filters to narrow to only Law Firms, or only Attorneys.

If you select a Law Firm, you will be presented with the available Contacts within that Firm, and the Law Firm filter will be grayed out. Use the Arrow to go back to main Search results.

- c. Select the appropriate Attorney record or **Add New Firm/Attorney**. (If the attorney email is not in the system, you will need to add it.) Select the **Products Ordered by Attorney**.

Then, Add Attendee.

Attorneys Present [X]

Brandon Crisp Esq.
Norton Rose Fulbright US LLP

← Editing Andy Fredericks:

Edit Attorney Information

Email: afredericks@veritext.com

Address: 707 Wilshire Blvd #3500, Los Angeles, CA 900

Products Ordered By Attorney

Transcript Nothing

ADD ATTENDEE

Once successfully added, the Attorney will show under **Attorneys Present**. If "Transcript" was selected as **Products Ordered**, an Order will also be created under **Orders**.

Attorneys Present [X]

Andy Fredericks
Andy Fredericks Law Firm

Brandon Crisp Esq.
Norton Rose Fulbright US LLP

← Editing Andy Fredericks:

Edit Attorney Information

Email: afredericks@veritext.com

Address: 707 Wilshire Blvd #3500, Los Angeles, CA 900

Products Ordered By Attorney

Transcript Nothing

REMOVE ATTENDEE EDIT ATTENDEE

Orders [ADD]

Andy Fredericks
Andy Fredericks Law Firm **Unsent**
(0) Witnesses

Brandon Crisp Esq.
Norton Rose Fulbright US LLP **Unsent**
(1) Witnesses

If you need to update an Attendee to include an Order, select the name under **Attorneys Present** and update the **Products Ordered**, and select **Edit Attendee**. **Remove Attendee** is only available if there is “Nothing” associated with the Attorney.

Attorneys Present ×

Andy Fredericks
Andy Fredericks Law Firm

Brandon Crisp Esq.
Norton Rose Fulbright US LLP

← Editing Andy Fredericks:

Edit Attorney Information

Email
afredericks@veritext.com

Address
707 Wilshire Blvd #3500, Los Angeles, CA 900 ▾

Products Ordered By Attorney

Transcript Nothing

REMOVE ATTENDEE **EDIT ATTENDEE**

- d. **Adding a New Firm or New Attorney (if applicable)** – After thoroughly searching for the firm or attorney, you can add a new firm/attorney by selecting the **Add New Law Firm** button from the main Search or **Add New Attorney** once a Firm has been selected. Enter all required fields (denoted with an asterisk) and **Add New**.

Duplicate Appearances

To duplicate Attorneys Present from a job *in the same case*, select **Copy** from the dropdown next to **Add**. Copy only works if you are assigned to other jobs within the same case; you cannot currently copy Attorneys from unrelated cases.

Attorneys Present **ADD** ▾

Add

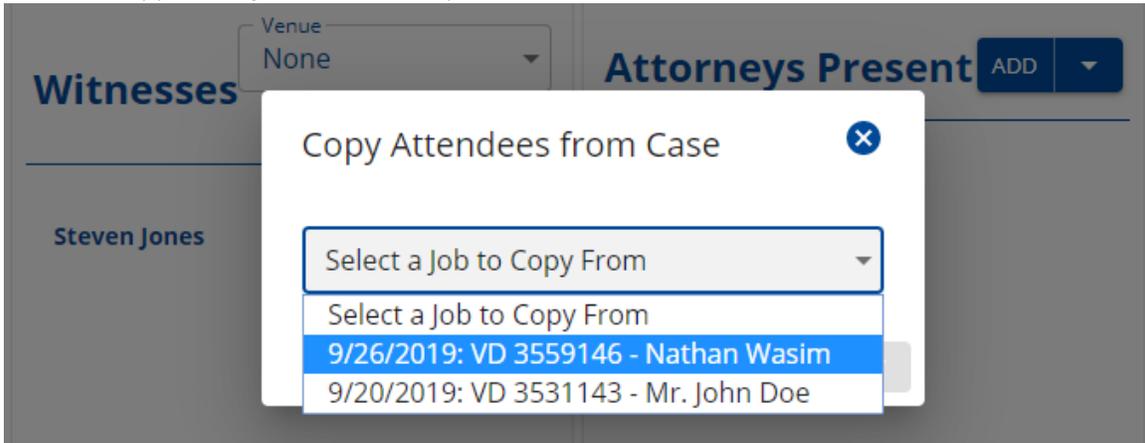
Mr. Charlie Cain
Cain & Skarnulis, PLLC

Mary E. Zaug Esq.
Kirkland & Ellis LLP

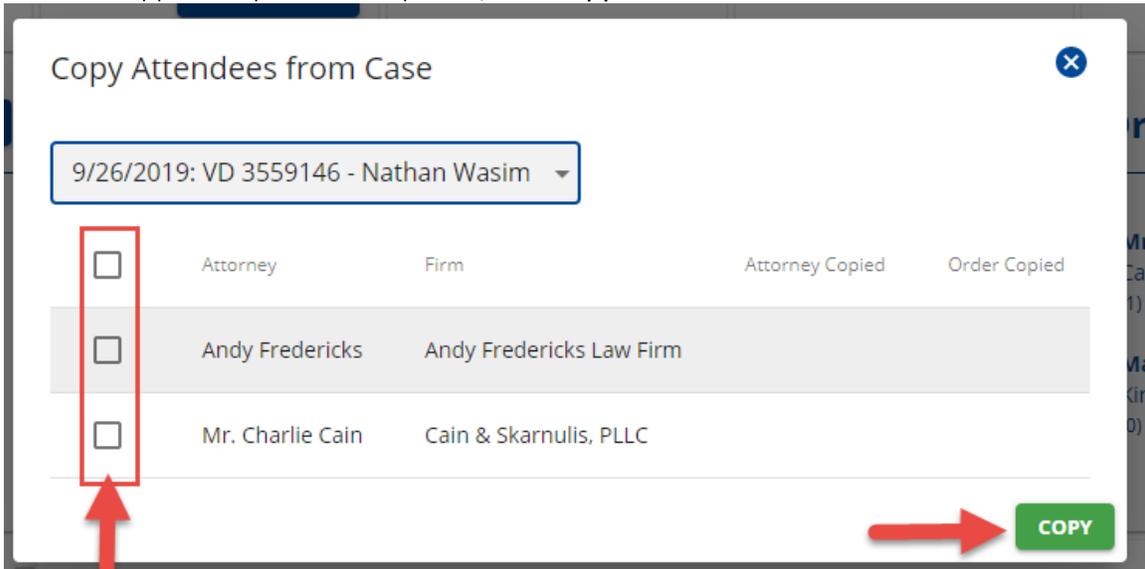
Copy

Print

Select the applicable job from the dropdown.



Select the applicable parties to duplicate, then **Copy**.



“Print” Attorneys Present

To create a .txt version of the Attorneys Present with full contact information, select **Print** from the dropdown next to **Add**.



A .txt file will download. Copy and paste to help assist in creating Appearances Page.

4. **Orders** – if you selected a **Product Ordered** for any **Attorneys Present**, a corresponding Order will have been created under **Orders**. In addition, any Orders entered by the Veritext Office will be listed here.

Orders entered by you via Portal will be designated as a “Portal Order”; Orders entered by the Veritext Office will be designated as a “Pre-Order” or “Manual Order”. “Pre-Orders” cannot be deleted, only edited.

If there is not an Order available for an ordering party, **Add** the contact under **Attorneys Present**. To remove an Unsent Portal Order, select the name under **Orders** then **Delete**.

To edit an **Unsent** Order, select the name then **Edit**.

Orders ×

Andy Fredericks
Andy Fredericks **Unsent**
Law Firm
(0)
Witnesses

Brandon Crisp Esq.
Norton
Rose Fulbright **Unsent**
US LLP
(1)
Witnesses

Unsent Portal Order

Andy Fredericks of Andy Fredericks Law Firm

707 Wilshire Blvd #3500
Los Angeles, CA 90026
afredericks@veritext.com
(512) 796-8639

EDIT

DELETE

No order details

← **Added using "Attorneys Present"**

The **Editing Order** window will open:

Dashboard / Job # 3254863 / Order #: 3855435

BACK TO JOB **Editing Order for Andy Fredericks of Andy Fredericks Law Firm** **SAVE**

a **Ordering Attorney** **CHANGE**

Attorney
Andy Fredericks
afredericks@veritext.com

Law Firm
Andy Fredericks Law Firm
707 Wilshire Blvd #3500
Los Angeles, CA 90026

b **Shipping Info**

Select an Address

Ship to a different address

c **Notes**

The following information may be entered: Bates number, exhibit color, oversized exhibits, timestamp, third-party information, split billing & expenses, and client matter number when applicable.

Characters remaining: 250

d **Details** **ADD**

Click "Add" to add a witness to this order.

- a. To edit the Attorney appearing on behalf of a Firm, select **Change** and follow the same process as you would to add Attorneys Present.

Dashboard / Job # 3254863 / Order #: 3855435

Editing Order for Andy Fredericks of Andy Fredericks Law Firm

Ordering Attorney **CHANGE**

Shipping Info

Notes

Attorney
Andy Fredericks
afredericks@veritext.com

Law Firm
Andy Fredericks Law Firm
707 Wilshire Blvd #3500
Los Angeles, CA 90026

Select an Address

Ship to a different address

The following information may be entered: Bates number, exhibit color, oversize exhibits, timestamp, third-party information, split billing & expenses, and client matter number when applicable.

Characters remaining: 250

Details **ADD**

Click "Add" to add a witness to this order.

- b. If applicable, select **Shipping Info > Address** for any physical products to be delivered to the Firm, e.g., Hard copy transcripts, DVD videos, etc. Select **Ship to a different address** to activate the address box below.

Dashboard / Job # 3254863 / Order #: 3855435

Editing Order for Andy Fredericks of Andy Fredericks Law Firm

Ordering Attorney **CHANGE**

Shipping Info

Notes

Attorney
Andy Fredericks
afredericks@veritext.com

Law Firm
Andy Fredericks Law Firm
707 Wilshire Blvd #3500
Los Angeles, CA 90026

Select an Address

Ship to a different address

The following information may be entered: Bates number, exhibit color, oversize exhibits, timestamp, third-party information, split billing & expenses, and client matter number when applicable.

Characters remaining: 250

Details **ADD**

Click "Add" to add a witness to this order.

- c. If applicable, enter any **Notes**.

Dashboard / Job # 3254863 / Order #: 3855435

Editing Order for Andy Fredericks of Andy Fredericks Law Firm

Ordering Attorney **CHANGE**

Shipping Info

Notes

Attorney
Andy Fredericks
afredericks@veritext.com

Law Firm
Andy Fredericks Law Firm
707 Wilshire Blvd #3500
Los Angeles, CA 90026

Select an Address

Ship to a different address

The following information may be entered: Bates number, exhibit color, oversize exhibits, timestamp, third-party information, split billing & expenses, and client matter number when applicable.

Characters remaining: 250

Details **ADD**

Click "Add" to add a witness to this order.

d. Select **Add** to the right of **Details**.

Dashboard / Job # 3254863 / Order #: 3855435

BACK TO JOB Editing Order for Andy Fredericks of Andy Fredericks Law Firm SAVE

Ordering Attorney CHANGE

Attorney
Andy Fredericks
afredericks@veritext.com

Law Firm
Andy Fredericks Law Firm
707 Wilshire Blvd #3500
Los Angeles, CA 90026

Shipping Info

Select an Address

Ship to a different address

Notes

The following information may be entered: Bates number, exhibit color, oversize exhibits, timestamp, third-party information, split billing & expenses, and client matter number when applicable.

Characters remaining: 250

Details ADD

Click *Add* to add a witness to this order.

e.

If there are multiple witnesses, select the checkbox next to the **Witnesses** you would like to edit. You can edit simultaneously (by checking both boxes), or independently (by checking one box at a time).

Editing Order Details BACK SAVE

Witnesses

Anna Jones

Joe Schmo

If multiple Witnesses

Product Ordered * Original+1

Product Shipped * Original+1

Delivery Days 10

Designation

Services

Exhibits Read & Sign Real Time Remote Real Time

Rough

Deliverables

Office Std. Email Only Full Transcript - PDF

Full Transcript ASCII - TXT Full Transcript - DOC

SHOW MORE

Edit Order Details:

Editing Order Details for Joe Schmo ← Witness Being Edited BACK SAVE

Product Ordered * 1 Please select

Product Shipped * 2 Please select

Delivery Days 3 10

4 Designation

5 Services

Exhibits Read & Sign Real Time Remote Real Time

Rough

6 Deliverables

Office Std. Email Only Full Transcript - PDF

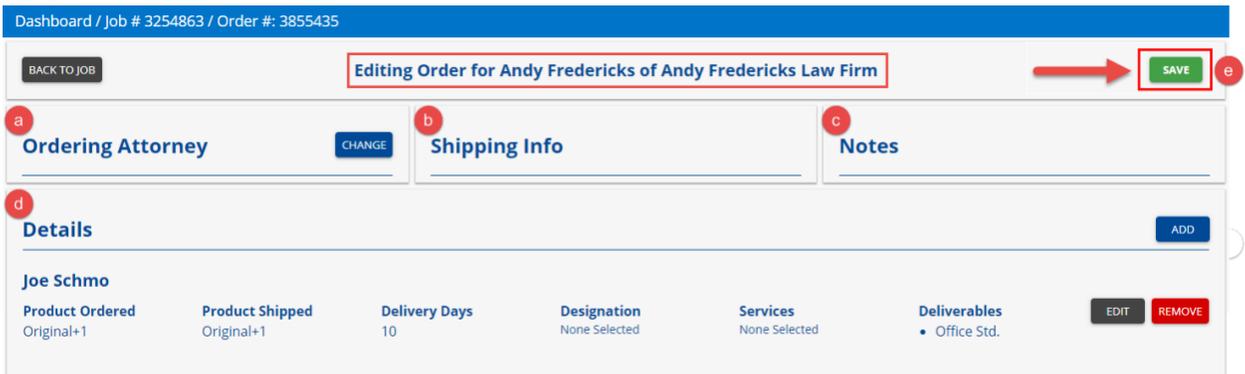
Full Transcript ASCII - TXT Full Transcript - DOC

SHOW MORE

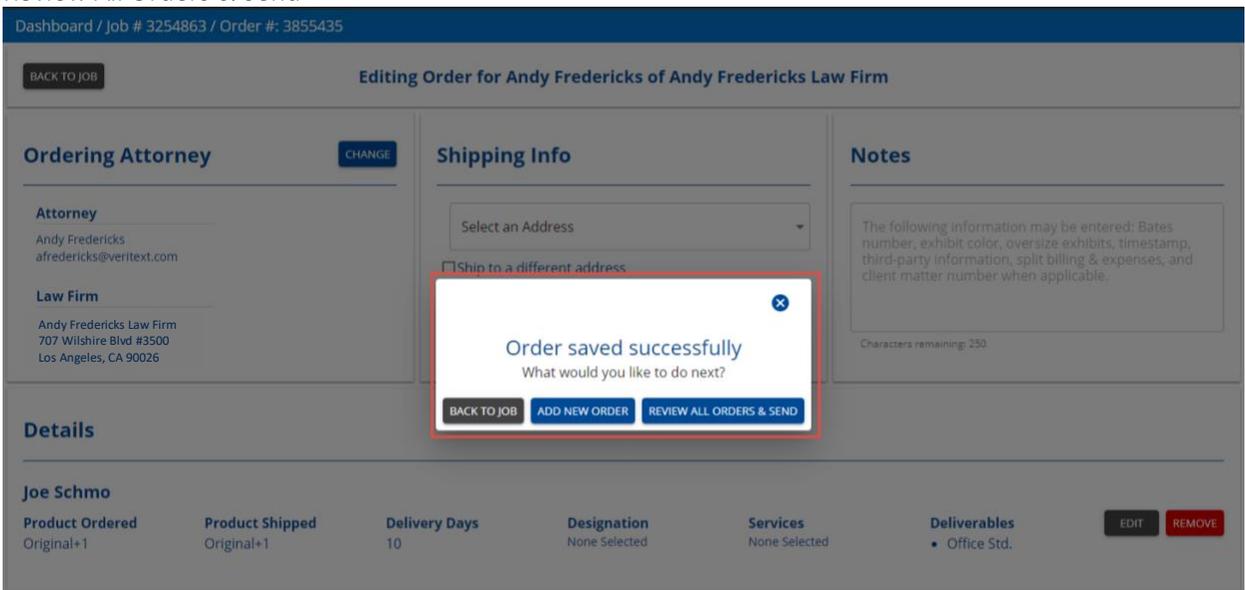
1. Select a **Product Ordered**.
2. Select a **Product Shipped**.
3. Select **Delivery Days**.
4. Select **Designation**, if applicable.
5. Select applicable **Services**.
6. Select applicable **Deliverables**. Default to "Office Std" unless Client specifically requests a format in addition to .txt, or .pdf. Select **SHOW MORE** to enable more options to choose.
 - a. If a physical copy of the transcript is requested, select "Hardcopy" options available under SHOW MORE.
7. Once complete, **Save** order. (Save is only enabled upon selection of required fields.)

- f. Upon **Save** of **Order Details**, you will see an **Order Details** summary of selected options. Review the Order(s). If changes are needed, you can select **Edit** to update, or **Remove** to delete. Order **Save** will enable at top-right.

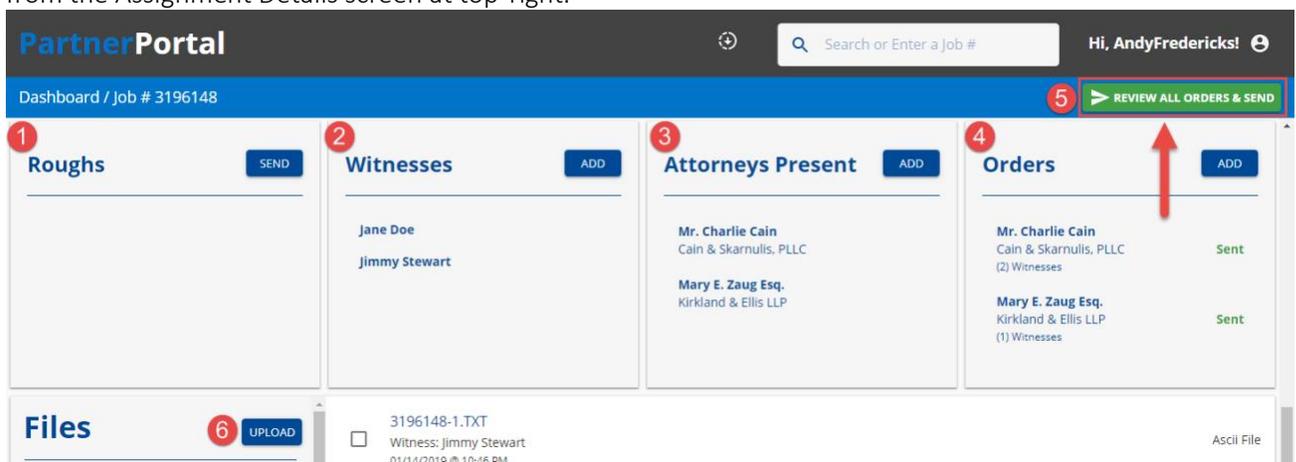
Save to add Order to Job.



Once Order has saved successfully, you will receive a prompt. You can go **Back to Job**, **Add New Order**, or **Review All Orders & Send**.



5. **Review All Orders & Send** – you can access **Review All Orders & Send** using the prompt dialogue above, or from the **Assignment Details** screen at top-right.



Review Order(s)

A summary of the orders you have entered will be presented on the **Order Summary** page. **Unsent Orders** will be listed first.

Dashboard / Job # 3531133 / Order Summary

[BACK TO JOB](#) In Re: Partner Portal Testing vs. | VD 3531133 [SEND JOB](#)

Job Status	Job Date	Due Date
Confirmed	09/19/2019 @ 9:00 AM CDT	Normal due on 10/03/2019

Unsent Orders

Andy Fredericks Andy Fredericks Law Firm
Address: 707 Wilshire Blvd #3500, Los Angeles, CA 90026
Contact: afredericks@veritext.com
Notes: ---

Anna Jones

Product Ordered	Product Shipped	Delivery Days	Designation	Services	Deliverables
Original+1	Original+1	10	None Selected	None Selected	<ul style="list-style-type: none">Full Transcript - PDFEmail OnlyTextMap - XMEFMini Transcript - PDFFull Transcript ASCII - TXT

Once you have validated that all the orders and information is correct, click the green **Send Job** button on the top right to submit all the information to Veritext for production and/or billing.

Dashboard / Job # 3531133 / Order Summary

[BACK TO JOB](#) In Re: Partner Portal Testing vs. | VD 3531133 [SEND JOB](#)

Job Status	Job Date	Due Date
Confirmed	09/19/2019 @ 9:00 AM CDT	Normal due on 10/03/2019

Unsent Orders

Andy Fredericks Andy Fredericks Law Firm
Address: 707 Wilshire Blvd #3500, Los Angeles, CA 90026
Contact: afredericks@veritext.com
Notes: ---

Anna Jones

Product Ordered	Product Shipped	Delivery Days	Designation	Services	Deliverables
Original+1	Original+1	10	None Selected	None Selected	<ul style="list-style-type: none">Full Transcript - PDFEmail OnlyTextMap - XMEFMini Transcript - PDFFull Transcript ASCII - TXT

A confirmation dialogue will appear. Select **Yes** to proceed with Sending.

Are you ready to send the Job? [NO](#) [YES](#)

Once Order has Sent successfully, you will receive a prompt. You can go **Back to Job**, **Go To Financials**, or **Return to Dashboard**.

Unsent Orders

Andy Fredericks Andy Fredericks Law Firm
Address: 707 Wilshire Blvd #3500, Los Angeles, CA 90026
Contact: afredericks@veritext.com
Notes: ---

Anna Jones

Product Ordered	Product Shipped	Delivery Days	Designation	Services	Deliverables
Original+1	Original+1	10	None Selected	None Selected	<ul style="list-style-type: none">Full Transcript - PDFEmail OnlyTextMap - XMEF

Job Sent Successfully
What would you like to do next?
[BACK TO JOB](#) [GO TO FINANCIALS](#) [RETURN TO DASHBOARD](#)

The Order status on the **Assignment Details** page will now reflect "Sent"...

Orders

[ADD](#)

Andy Fredericks
Andy Fredericks Law Firm
(2) Witnesses

Sent

... and the Order will move to the bottom **Sent** section of the **Review All Orders & Send** page:

Dashboard / Job # 3531133 / Order Summary

[BACK TO JOB](#) **In Re: Partner Portal Testing vs. | VD 3531133** [SEND JOB](#)

Job Status Confirmed	Job Date 09/19/2019 @ 9:00 AM CDT	Due Date Normal due on 10/03/2019
--------------------------------	---------------------------------------------	---------------------------------------------

Unsent Orders

No Orders/No Orders with Details

Sent Orders [COLLAPSE](#)

Andy Fredericks Andy Fredericks Law Firm

Address:
707 Wilshire Blvd #3500
Los Angeles, CA 90026

Contact:
afredericks@veritext.com

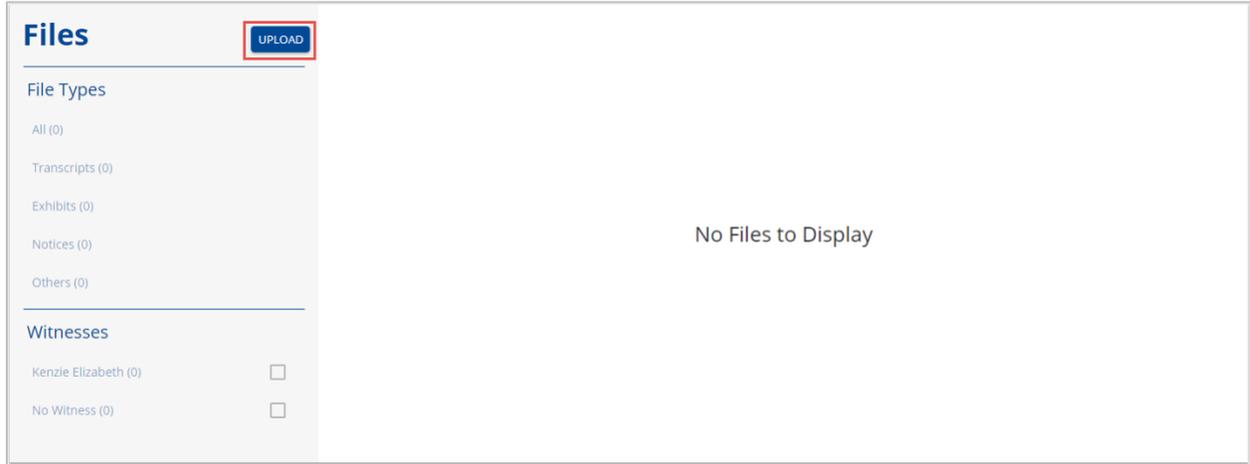
Notes:

Anna Jones

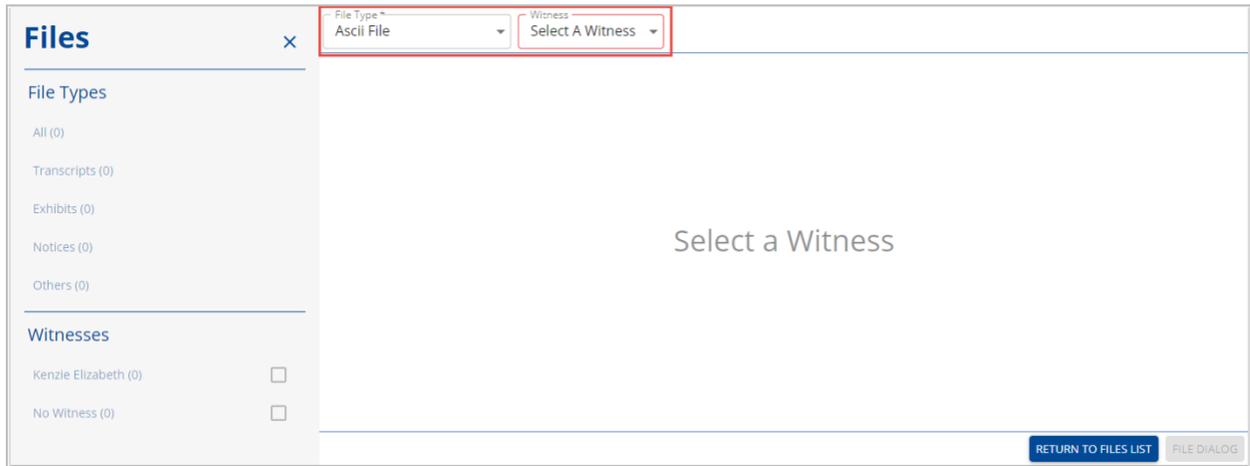
Product Ordered Original+1	Product Shipped Original+1	Delivery Days 10	Designation None Selected	Services None Selected	Deliverables <ul style="list-style-type: none">• Full Transcript - PDF• Email Only• TextMap - XMEF• Mini Transcript - PDF• Full Transcript ASCII - TXT
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6. **Files** – You can upload files and access files to download, e.g., Exhibits, or Notices.

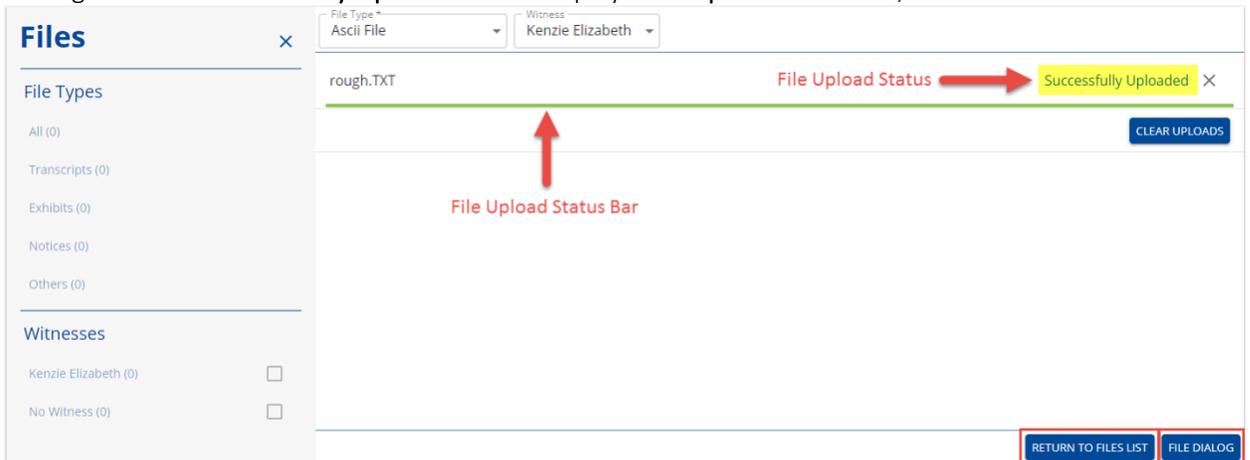
To upload a file, click “**Upload File**” at the top right of the files box.



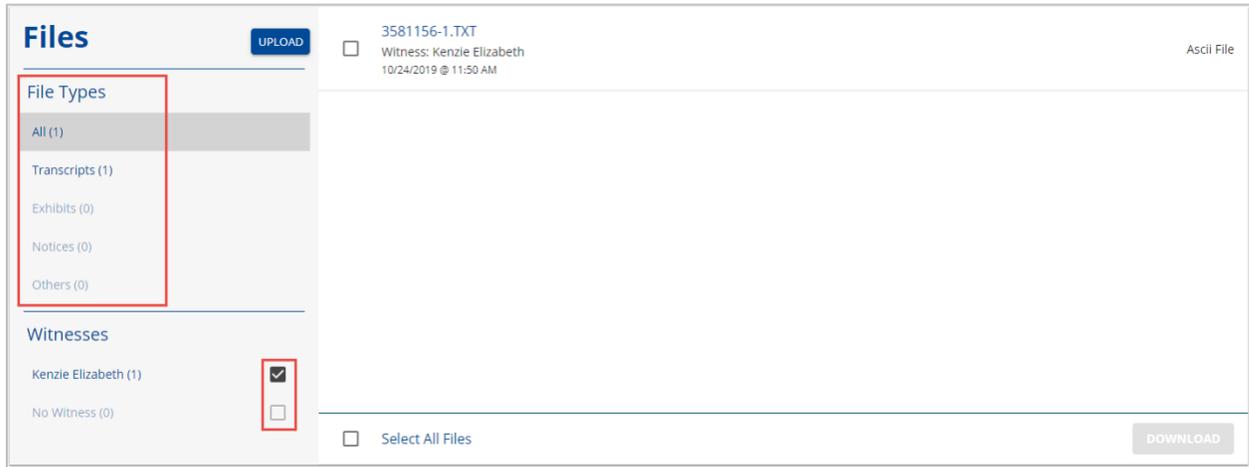
Select the appropriate **File Type**. Depending on the File Type, you may also have to select the corresponding **Witness**.



Once a selection has been chosen for the required fields, drag the file into the upload box, or select the **File Dialog** button to Browse to the file location. Once the File has been successfully uploaded, the progress bar turns green and “**Successfully Uploaded**” text displays. To **Upload** more files, select **Return to File List**.



Once the Files have been uploaded, you can browse using the **File Type** menu at the left. You can **Filter** results by Witness. Number of files available per category are indicated in parenthesis.



To download files, check the boxes for the individual items - or choose **Select All Files** - then **Download**.

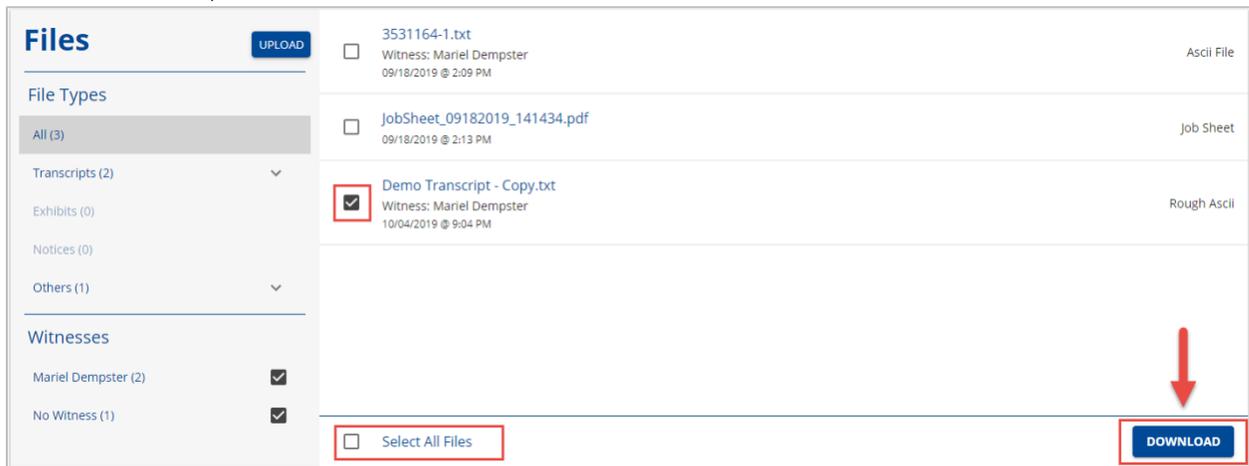


Exhibit Stickers Tool

When uploading exhibits, PartnerPortal gives the option to “sticker” unmarked exhibits. To do so:

PRE-UPLOAD

1. Organize all the exhibits that were introduced during the proceeding in one folder on your computer.
2. Rename all the exhibits to have a consistent naming convention that includes the number of the exhibit, e.g., “Ex_1, Ex_2, Ex_3” OR “Exhibit 1, Exhibit 2, Exhibit 3”

NOTE - if you inconsistently name the files, e.g., “Exhibit 1, EX 2, E. 3,” the exhibits will be incorrectly marked upon upload. Make sure the naming prefix is consistent for all exhibits uploaded.

TO “STICKER”

3. On Portal, navigate to the **Assignment** and scroll down to the **Files** section.
4. Select **Exhibit** as the **File Type**, then the corresponding **Witness**.
5. Enter the **Starting Exhibit Number**.
 - a. If exhibits are numbered consecutively (i.e., there are no breaks in exhibit numbers), exhibits can be uploaded all at once.
 - b. If exhibits are not numbered consecutively (e.g., 1 - 5, 9 - 14, etc...), exhibits will need to be uploaded in batches. For example:
 - i. Choose the **Starting Exhibit Number “1”**. Upload exhibits 1 - 5.
 - ii. Choose the **Starting Exhibit Number “9”**. Upload exhibits 9 - 14.
 - iii. Repeat in batches, as needed.

6. If your exhibits are unmarked and need to be “stickered,” select **Stamp Exhibit Numbers**.

The screenshot shows the top section of a web interface. It includes three dropdown menus: 'File Type*' set to 'Exhibit', 'Witness' set to 'Kenzie Elizabeth', and 'Starting Exhibit Number' which is empty. To the right of these is a checkbox labeled 'Stamp Exhibit Numbers' which is currently unchecked. Below the dropdowns is a large white box with the heading 'Input an Exhibit Number' and a paragraph of instructions: 'Exhibits must be named consistently using the same prefix for each set of exhibits. Any discrepancy will lead to exhibits being incorrectly stamped upon upload. Correct Example.: "Doe 1.pdf", "Doe 2.pdf", "Doe 3.pdf" OR "Ex. 1.pdf", "Ex. 2.pdf" etc.' At the bottom right of this box are two buttons: 'RETURN TO FILES LIST' and 'FILE DIALOG'.

- a. You do not need to sticker previously marked exhibits, unless they were re-marked as a new exhibit.
 - b. The system will remember this preference and it will automatically be selected the next time you go to upload exhibits on any job. Deselect **Stamp Exhibit Numbers** if you do not need to sticker exhibits.
7. Drag and drop the exhibits from the folder on your computer into the center of the files box OR select **File Dialog** in the bottom right hand side of the **Files** box and select the files from the folder on your computer.

This screenshot is similar to the previous one, but the 'Starting Exhibit Number' dropdown is now set to '1' and the 'Stamp Exhibit Numbers' checkbox is checked. In the center of the white box, there is a large text prompt 'Drag Files Here or Use the File Dialog' with a red arrow pointing to the text and another red arrow pointing to a file icon (three overlapping sheets of paper) on the right. The instructions paragraph and buttons at the bottom remain the same.

8. Upon secure upload, exhibits will automatically become searchable, and will be marked with the corresponding exhibit number so long as exhibits were named consistently per step 2 above.

CHAPTER 5 – Financials

The job financials section is used to create an invoice for your assignments that will be submitted to Veritext for payment and to upload receipts for reimbursable expenses. Please note that job financials are for individual assignments.

To access **Financials**, from the **Assignment Details** screen, select the **\$** icon **at top-right**.

1. **Job Financials** -- You can add line items to your invoice by selecting **Add Expense**. A side-bar will open. Fill out the fields and select **Create** or **Create & Add Another**.

PartnerPortal

Dashboard / Job # 3531164 / Financials

Job Financials
Enter your Expenses for this Job

Invoice Total: \$0.00

Type	Unit	Quantity	Orders	Rate
------	------	----------	--------	------

Files

File Types

All (0)

Invoices (0)

Receipts (0)

No Files to Display

Create Expense

Services: Waiting Time (Reporter/Videographer Standby Fee)

Unit: 1

Quantity: 1

Orders: 1

Rate: \$ 50

Total: \$50.00

CREATE CREATE & ADD ANOTHER

Helpful Hints:

- Please use this Tab to transmit unusual or extraordinary charges e.g., airline tickets, parking receipts, tokens, etc.
- Order data does NOT need to be re-entered.
- These charges will be coordinated with the Orders submitted via the Portal.
- Mutually-agreed upon rates are reflected in Veritext's back office system and do not need to be re-entered here.
- Hard-copy receipts for these extraordinary charges should be sent to the office noting the appropriate Job No.

Once your items have been correctly entered and the invoice total is displayed correctly on the left-hand side, select **Submit Financials**.

Dashboard / Job # 3531164 / Financials

Job Financials
Enter your Expenses for this Job

Invoice Total: \$50.00

Type	Unit	Quantity	Orders	Rate	Total	Actions
Waiting Time (Reporter/Videographer Standby Fee)	1	1	1	\$50.00	\$50.00	EDIT DELETE

Rows per page: 1-1 of 1

SUBMIT FINANCIALS

ADD EXPENSE

2. **Upload Receipts** - if you're submitting expense for reimbursement, upload the **Receipt** using the **Files** section of the Financials page. All permissible expenses must be entered within 24 hours of submitting the assignment to be eligible for reimbursement

Dashboard / Job # 3531164 / Financials

Files

File Types

All (0)

Invoices (0)

Receipts (0)

File Type: Receipt

Merchant: YouPark

Amount: \$ 25.00

Date: 10/11/2019

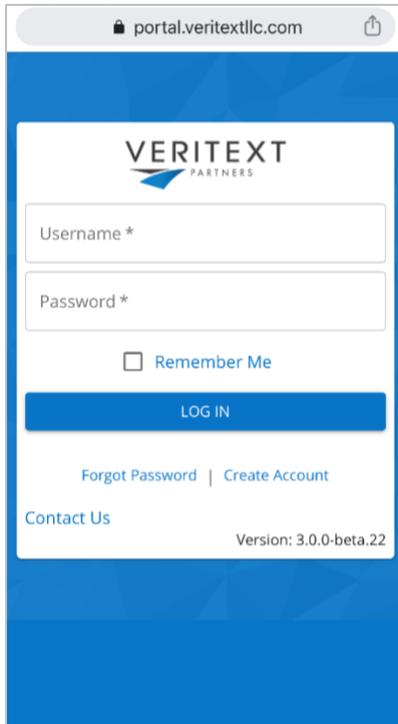
Drag Files Here or Use the File Dialog

RETURN TO FILES LIST FILE DIALOG

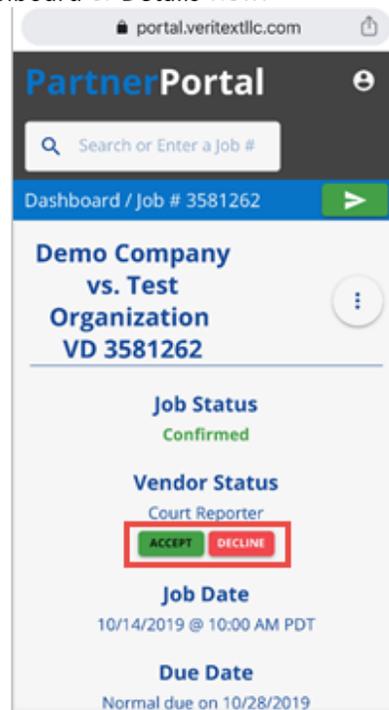
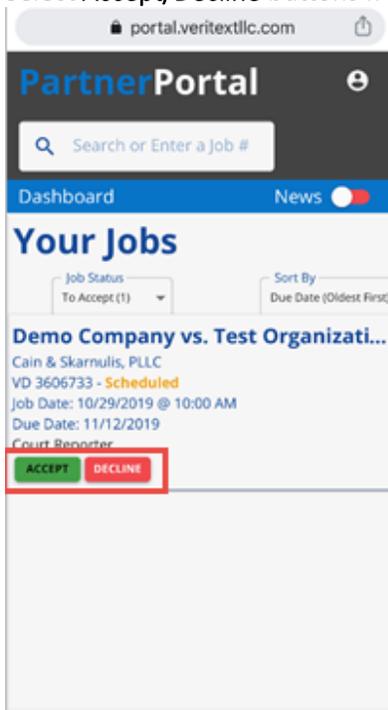
CHAPTER 6 – Mobile

PortalNEXT is enabled for mobile using your browser of choice (Veritext recommends Chrome). Features on mobile, work the same as on a desktop browser.

1. From your browser, go to www.veritext.com and navigate to Partner Portal, or bookmark the Portal page (<https://portal.veritextllc.com/#/login>). **Log In.**



2. To review/accept assignment, select appropriate **Job Status**, and **Sort By**. Click on job to view **Assignment Details**. Select **Accept/Decline** buttons from **Dashboard** or **Details** view.



3. Use the three-dot menu in the upper-right to access more options. Use the green arrow button to **Send & Review Jobs**.

