

# *Scopists and Reporters: Enhancing the Partnership*

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## **Step One: Establish a Partnership!**

### **☞ There is a difference between a buyer-seller relationship and a partnership.**

A buyer-seller relationship is one in which one party requires a service to be performed, communicates the requirements and pays someone to provide the service. Beyond expecting the job to be done to the specifications, there is no investment in the relationship beyond payment for services rendered.

A partnership is a relationship in which both parties have a significant interest and/or investment in the success of their mutual efforts. It involves a greater level of communication, trust and implies a commitment to continuity.

### **☞ Successful scopists & reporters have a partnership**

The job that the reporter is hiring the scopist to do is an integral part of his or her own job responsibilities. In order to be successful, the scopist and reporter must have a partnership because of what's on the line: reputation, income, and the commitment to the accurate record. You're not just splitting the workload; you're a team with a mutual commitment to putting together a perfect product.

The reporter is, of necessity, the senior partner in the relationship because it's their name on the final product, their reputation on the line and ultimately their responsibility for accuracy of transcript.

Reporters who are interested in delegating a part of that responsibility would be unwise to hand their transcript production responsibility to an uninterested party who is merely providing a service. They need a partner they can trust: someone who is as interested in and invested in the outcome as they are themselves; someone who is as much of a perfectionist, someone willing to question and challenge, and someone who is willing to help them improve their future translation.

Scopists don't want a reporter who is willing to abdicate all responsibility to them. A scopist wants a reporter who is willing to work with them so that the job can get done quickly, efficiently and with the best possible results, both for the current job and for the future.

### **☞ More than "one job at a time."**

Dictating and typing meant working on one job at a time. Transcribing from a tape is working one job at a time. Editing simply by typing over or deleting and then inserting text in place of untranslates, mistranslates, conflicts, etc. would be working one job at a time. **It is a waste of time to work one job at a time.**

The whole reason that CAT software was created was to enable reporters to work not only on the current job, but to improve results for the next job, via editing features such as personal and job defines, and conflict resolution. The next job should almost always be easier than the previous one.

Think of your CAT software as the third partner in the Scopist-Reporter relationship: a partner that is also invested in your success and in your future results.

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## Finding the Right Partners

### 🔑 Resources for finding a scopist/reporter

- CAT Vendor
  - ✓ Web Site Listings
  - ✓ Sales reps
  - ✓ Trainers
  - ✓ User Groups
- Internet
  - ✓ [www.ncraonline.org](http://www.ncraonline.org) – classifieds and in NCRA Forum, scopist section
  - ✓ <http://go.compuserve.com/courtreporters> – classifieds and scopist section
  - ✓ search engines – many other court reporting sites, online resumes, etc.
- Local, regional, state, national association meetings
- Schools
  - ✓ Reporting students
  - ✓ Reputable scoping programs – check for graduates

### 🔑 Qualities of a Great Scopist/Reporter Partner

- Knows the computer
  - ✓ Wants to work efficiently; **with** you
- Knows the industry
- Knows terminology, rules of grammar, punctuation
- Knows how to research a question
- Not afraid to ask a question
- Has a commitment to quality

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## The third partner: CAT Software

- 🔑 The best results come when the fewest lines need to be crossed
- Same CAT system, same version
    - ✓ All the same capabilities
    - ✓ Should have no or virtually no difference between files on each system
  - Same CAT system, different versions
    - ✓ Older version will have fewer capabilities
    - ✓ May have some compatibility issues, but in most cases be relatively easy to modify
  - Different CAT systems, latest versions on both systems with RTF/CRE capability
    - ✓ Quality will depend on how well each vendor sticks to RTF/CRE specs, but should be able to exchange text, note and dictionary files
    - ✓ Some features cannot cross system boundaries (e.g. AudioSync, automatic indexing capabilities, form fields, etc.)
    - ✓ May have some compatibility issues, but in most cases should be relatively easy to modify. Make sure both parties have hard copy of example of proper format so that adjustments can be made as needed
  - Different CAT systems, not updated to latest versions, with RTF/CRE capability
    - ✓ Same as above, but may have more compatibility issues, and may be more difficult to modify. As software is updated and improved, so are RTF/CRE capabilities.
  - No RTF/CRE
    - ✓ Pretty much the equivalent of proofreading; not scoping
    - ✓ Text-only exchange *might* be possible; might not
    - ✓ No dictionary or notes exchange

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## Four keys to a Successful Scopist-Reporter Partnership

- 🔑 Each partner must understand their role in the process
- 🔑 Each partner must have the same standards for quality
- 🔑 Each partner must have a thorough understanding of their CAT software
- 🔑 Each partner must be willing to ask questions of their partner, and answer questions for their partner.

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## Agree on each partner's role

- 🔑 Job description
  - Not all reporters understand what a "scopist" is or is supposed to do: make sure you both have the same definition.
  - Clearly define expectations regarding
    - ✓ Detail responsibilities (types of editing to be done)
    - ✓ Turnaround time
    - ✓ Payment (rates and procedures)
    - ✓ Other business relationships
- 🔑 Editing Responsibilities
  - Identify the tasks which need doing, and which party will be responsible
    - ✓ Defining for personal/job dictionaries vs. Replace/Type
    - ✓ Conflicts (add to database)
    - ✓ Spellcheck wordlists/dictionaries
    - ✓ Punctuation and grammar issues
    - ✓ Standard page & parenthetical information

## 🔑 Dictionary Maintenance

- Having the scopist create and send dictionary defines to the reporter is as important as sending the edited file
- Consequences of reporter not improving a personal dictionary
  - ✓ Required to change the same things over and over and over
  - ✓ Editing takes longer than it needs to; affects turnaround time
  - ✓ Frustration factor
- Ideas a scopist might want to consider
  - ✓ Offer dictionary maintenance service (revenue generator)
  - ✓ Offer different price rates for reporters who will improve dictionary and work with the scopist vs. those who don't/won't
  - ✓ Turn down work from those reporters who don't/won't improve dictionaries

## 🔑 Conflict Handling

- If CAT system has "intelligence" find out whether you need to exchange record of conflicts selected during edit (conflict database or other file)
- Policy regarding creating new conflicts

## 🔑 "Sacred Cows"

- Identify the things that should not be touched – items the scopist should not correct or edit (examples: should scopist "clean" the record of false starts, stutters, "you-know"s, "um" s, etc. or keep their hands off?)

## 🔑 How to handle questions

- Establish a system for handling questions that come up
  - ✓ Phone/voice-mail, email, instant message service
  - ✓ Scan-able/search-able notes within the transcript
  - ✓ Hard copy list

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## Same Standards of Quality

### 🔑 Standards for Transcript Quality

- Rules of grammar and punctuation
  - ✓ If you're not sure, check the rule
  - ✓ Be able to quote the rule if your partner challenges it
  - ✓ Know when to be flexible
- Rules for style/format
  - ✓ Be aware that different reporters, firms, courts have different rules, therefore each partner's understanding of what is "correct" may be different
  - ✓ Review the rules – provide examples
- Standard Pages/Parentheticals
  - ✓ Again, different reporters, firms, courts have different rules about what types of standard pages must be present, in different orders and with different formatting, therefore each partner's understanding of what is "correct" may be different.

### 🔑 Standards for Quality of Work Process

- Business ethics
  - ✓ Make sure you're both on the same page – have the same values
  - ✓ Partners can have differences of opinion, but if you're uncomfortable with a business practice – confront and question it, or end the relationship – don't stay uncomfortable.
- Work ethic
  - ✓ Accountability = confidence
  - ✓ Commitment to the job – know how each partner deals with "distractions"

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## Know your CAT Software

### 🔑 Know Your CAT Software!


- Both partners should take advantage of training options
  - ✓ Contact your vendor to find out what's available (e.g., personal training for both of you, separately, workshops, tips books, training via Internet, local user groups, etc.) Investment will pay off for both partners
- Focus on features that will enhance your work process
  - ✓ No one needs to be an expert on every feature – learn which apply to you and your job, know what you can ignore
  - ✓ Reporter should be familiar with translation features that affect edit, know about dictionary and file maintenance
  - ✓ Scopist should be adept with post-translation editing features
- Know what files to share
  - ✓ Know what files will be helpful to your partner (and their filename extensions)
    - Job Dictionary and/or Update Area
    - Global Table
    - Spellcheck wordlists (job and personal)
    - Job History
    - Shortcuts


### 🔑 Understanding RTF/CRE

- Rich Text Format/Court Reporting Extensions
  - ✓ What can be transferred between different systems – RTF/CRE specifications
    - Text
    - Court reporting elements (untranslates, conflicts, punctuation handling, formatting elements, dictionaries and embedded commands within those dictionaries, steno notes files)
    - Timestamps

✓ What cannot be transferred between systems


- Audio
- Features that may not be transferable, depending on system features and by RTF/CRE coding interpretation


 Some CAT systems use character positioning (column #) and others use physical placement (measurement in inches) to determine spacing on a line. You should expect issues when exporting/importing the file via RTF/CRE if communicating between systems that measure spacing differently. The different systems of measurement may cause lines and pages to break in places where you don't expect them to.

 The importing CAT system will throw out any features or formatting codes it doesn't understand. If the importing CAT system doesn't have a particular feature, it doesn't have a code for it and so those items get excluded or interpreted differently than from the originating system.


For example, suppose in one CAT system, a word is marked as italicized. If converted to RTF/CRE and sent to a CAT system that supports italics, it will convert without issue. However, if sent to a CAT system that does not use or recognize italics, the italics would be thrown out.

Another example of misinterpretation by RTF/CRE: Let's say one party is using a CAT system with an "intelligence" feature sees steno which has no matching dictionary entry, but interprets a possible translation and presents it as text on screen, but still codes it as an untranslate. The CAT system presents this text in a manner so that if incorrect, the user can easily move the cursor to it and edit it as needed. In the original system, even if no change were made before printing or converting to ASCII, the text would appear as normal text. However, if no change is made, and the file is converted to RTF/CRE, the underlying coding which signals an untranslate would be interpreted by the receiving/importing system as a pure untranslate.

 There are no RTF/CRE specifications for "automated" features in the various CAT systems and each of these may be handled differently by each vendor. You will most frequently see issues with regard to results with conflict resolution and phonetic translation

 Timestamps are included in the RTF/CRE specifications, but it is up to the importing system to determine how they are used. If the importing system doesn't use timestamps, then it ignores their existence in the RTF/CRE file and should make no attempt to import them. If the importing system does understand timestamps, it imports them; however the method used by the importing software to positioning those timestamps may vary from how the original software handled timestamps, and that may affect the printed result.

**Timestamps are included in the RTF/CRE specifications, but it is up to the importing system to determine if and how they are used. Older systems may have a timestamp capability, but may not be able import timestamps from RTF/CRE files.**

 There may be "non-standard" code that one vendor may use that is not supported by other vendors.



## 🔑 Audio

- Cannot exchange audio between two CAT systems and retain synchronization
- Audio as an editing tool vs. reporter's backup
- Large files – determine how to exchange

## 🔑 Understanding Email and File Attachments

- All file types can be emailed
  - ✓ Files do not have to be converted into any particular format before they can be attached
  - ✓ Files should be converted into the format that the partner requires
    - Same CAT system – no conversion
    - Different CAT systems – RTF/CRE (TIP: Establish filename conventions to differentiate between dictionary, text, notes)
    - Other: determine best available alternative
- Not all Internet Service Providers are alike
  - ✓ Use Plain Text (no HTML, graphics, special fonts, etc.) in message body
  - ✓ One file attachment per email message
    - If you need to send multiple files, zip them first
    - Tips for AOL users
      - AOL may automatically zip file attachments when sending, so if you have already zipped the files, you could wind up with a "double-zip."
      - AOL may also automatically unzip file attachments when received – if you don't want this to happen, de-select the "automatically de-compress files at sign-off" option in your Download Preferences.
      - AOL may not accept graphics within the body of a message or multiple file attachments from non-AOL senders; will combine all of these elements and encode them into a single file attachment called a MIME file. If you do not have software to "de-MIME" and break these elements apart, advise all parties sending anything to you to follow the

rules listed above: plain text messages only and only one file attachment per message.

- Anti-virus protection
    - ✓ Use antivirus software and check ALL file attachments before opening
    - ✓ Update your antivirus software regularly
    - ✓ Don't panic when you receive email warnings about viruses
      - 99.99% of "warnings" are hoaxes passed on by well-meaning friends and colleagues. You can check whether the warning is valid at:  
<http://vil.mcafee.com/hoax.asp>? or <http://www.symantec.com/avcenter/hoax.html>
  
  - Email Alternatives (especially for large attachments)
    - ✓ File exchange services (e.g. [www.whalemail.com](http://www.whalemail.com))
    - ✓ Instant messenger programs, file attachment functions
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## **Communication: ASK QUESTIONS**

- 🔑 Most people refrain from asking questions for fear of looking "stupid."
  - The only "stupid" question is the one you don't ask.