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REPORTER INSTRUCTIONS FOR USING THE WEB REPOSITORY

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The online repository is made available to all reporters associated with Planet Depos. It is the best way to view job assignment details; past and future jobs; confirm job assignments; view previous transcripts, exhibits, notices, and other prep materials; turn in final transcripts; view past and upcoming pay information; and to keep track of outstanding receivables.

Login and Security

To log in and connect, go to https://planetdepos.reporterbase.com/resource

Enter your User ID and password. If you have not already received a username, please send an email to transcripts@planetdepos.com.

The web repository now requires **Multi-Factor Authentication (MFA)** when you log in for the first time from a new browser or IP address. It is not a feature that Planet Depos can turn off. If you are having trouble accessing your account, please email transcripts@planetdepos.com or call 888.433.3767, and we can assist with troubleshooting the issue.

You will receive a One-Time Verification Code to the email address or the mobile phone number associated with your account. After entering the verification code, please check **Remember this Browser as Trusted Browser**. Checking this box will prevent you from completing MFA each time you login.

There are a few reasons why you may not be receiving the 2-factor code. Please see below troubleshooting suggestions:

1. **Spam filter**: The code will be sent from scheduling@planetdepos.com. Please be sure to whitelist, or mark as safe, this email address.

2. **Verify the email address associated with your account:** Please contact our office if you are still not receiving the email after whitelisting/marking as safe scheduling@planetdepos.com. It could be that your email address is incorrect in the system.

3. **Text option:** If neither of the above suggestions work, the code can be sent to your mobile number. If you do not see your mobile number displayed as an option, please call 888.433.3767 or email transcripts@planetdepos.com to add a mobile number to your account.

Jobs

1. Click **Jobs** in the top navigation bar.

2. In the Calendar screen, your assigned jobs for the current month appear. You can choose a **View Style** in the drop-down to the left:

- **Calendar** - To see jobs a month at a time.

- **List** - To see jobs in a list format.

- You can also filter jobs by date, job number, case, or firm name. When changing the View Style or filtering jobs, be sure to click the **Search** button (magnifying glass) to see your results.

3. To see an assigned job's details, click the job number (in blue).

- In the **Job Location** section, click the icon labeled **Maps** to access Google Maps, MapQuest Maps, or Bing Maps directions.

- Under the **Repository** section, any files uploaded to the repository are listed. To access previous transcripts, notices, complaints and other prep materials, simply click the checkbox next to the file, and click the **Download** (down arrow) button. If exhibits have already been turned in but are still needed, they can be accessed here.

- Under the **Task** section, you can acknowledge your assignment. Click the **More Actions** button in the upper-right corner of the Task section and click on Set Acknowledged Date. A window will appear; click Yes. Please acknowledge by 9:00 p.m. ET the evening before the job date.

Turning In

Turning in a job via the web repository is fast and simple. Simply click on the **Repository** tab in the top navigation bar, enter the job number and follow the below steps:

1. Click on the job number (in blue).

2. In the **Repository** section, click **New** (plus sign).

3. Drag & drop your transcript and paperwork (Billing & Processing Form, etc.) into the box that appears to the right, or click inside the box to browse for the files on your computer.

4. Click **Next**.

5. Select the file type from the drop-down menu.

6. Click **Upload**.

7. Repeat this process to turn in other files, exhibits, paperwork, etc.

Congratulations, you have successfully turned in your job! Should you wish to receive a confirmation of receipt, simply email transcripts@planetdepos.com to inform us that your job has been uploaded. You will then receive an email reply from us.

Tasks In Progress

To view your tasks/jobs in progress:

1. Click on **Tasks in Progress** in the top navigation bar.

2. A list of your outstanding jobs will appear.

3. If desired, you can export this list as a spreadsheet by clicking on the Export button in the bottom right corner and choosing either Excel or CSV.

Account Activity

See at a glance which jobs have been billed and what you are owed. Filter invoices by job date, case name, or witness. Review your commission details of any invoice.

1. Click Account Activity in the navigation bar.

2. In the Account Status drop-down, select one of the following:

- **All –** To see all invoices. This is the default.
- **Next Pay** - To see invoices that will be paid on the next pay day.
- **Payable** - To see invoices that are still outstanding (i.e., still owed to you)

3. Limit the invoices further by selecting one or more search filters in the Search Criteria pane:

- **Job Date** - To find invoices for different time periods, enter new beginning and end dates, or click the calendar buttons to the right and select dates in the pop-up Date Navigators.
- **Case** - To find invoices for a specific case, enter part of the case name into the field.
- **Witness** - To find invoices for a specific witness, enter part of the witness's name in the field.

4. Click **Search** (magnifying glass).

5. All potential matches to the information you entered will appear. To change the order of the invoices, click the heading of the column by which you want to sort the rows. Click the column header again to reverse the sort order.

6. Click an invoice number (in blue) for more details.

Pay Statement

To view, print or save your current and past payroll reports:

1. Click **Pay Statement** in the navigation bar.

2. In the **Search Criteria** pane, specify the following parameters:

- **Pay Date** - Click the Lookup button. All past pay dates will appear (up to 50 per page). Select a pay date (in blue).
- **Show Detail** - To view the details of your commissions, select **Yes** in the drop-down.

3. Click **Search** (magnifying glass).

4. Your Pay Statement for that pay date will come up. Please note your Payment Statement may be more than one page; to view more pages, click the small black arrows at the top of the statement to navigate.

Repository

Once assigned to a case, you have access to previous transcripts, notices, complaints, and other prep materials (if available) from the web repository.

1. Click **Repository** in the top navigation bar.

2. Search for your jobs by selecting one or more search filters in the **Search Criteria** pane:

- **Case** - To find jobs for a specific case, enter part of the case name into the field.

- **Job Date** - To find jobs for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.

- **Job No.** - To find files for a specific job, enter the job number.

3. Click **Search** (magnifying glass).

4. Click the job number (in blue).

5. Under the **Repository** section, you will find the associated files available for download. Click the checkbox next to the file you want to download and click the Download (down arrow) button.

Master Word List

Once assigned to a case, you may also have access to a master word list.

1. Click **Master Word** List in the top navigation bar.

2. Search for a word list using one of the following criteria:

- **Case** - To find a list for a specific case, enter part of the case name into the field.

- **Job No.** - To find a list for a specific job, enter the job number.

3. Click Search (magnifying glass).

4. Click on the list you'd like to access.