



RB Web 8 online office for reporters, sales reps and other staff

User Guide

Table of contents

Program Basics

- Logging in 1
- Navigating the site 1
- Exiting the site 1

My Web

- Reviewing & updating your personal information 2
- Changing your user ID & password 2

Calendar

- Viewing your job calendar 3
- Viewing assigned jobs' details 4
- Adding jobs to your own calendar 5
- Acknowledging job assignments 6
- Estimating pages and delivery dates 6

Turn-in

- Turning in jobs online 7
- Adding or updating witnesses 9
- Adding ordering parties automatically 10
- Adding ordering parties manually 11
- Entering service items using billing sets & standing orders 12
- Adding service items manually 13

Activity

- Viewing financial activity 13

Pay Statement

- Viewing pay statements 15

Repository

- Accessing shared files 16
- Sharing files 17
- Accessing your personnel files 17

Master Word List

- Compiling your own word lists 18

Availability

Viewing your schedule & requesting time off.....	19
--	----

Firms

Looking up firm information	20
-----------------------------------	----

Support

Tracking your requests & solving problems.....	21
--	----

This manual, as well as the software described in it, is furnished under license and may be used and copied only in accordance with the terms of such license. The content of this manual is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by OMTI Inc. OMTI Inc. assumes no responsibility or liability for any errors or inaccuracies that may appear in this book.

Any references to company names or persons in sample screens are for demonstration purposes only and are not intended to refer to any actual organization or person.

ReporterBase, the ReporterBase logo, ReporterBase 8, RB Web and the RB Web design are trademarks of OMTI Inc. in the United States and other countries.

© 2014–2017 OMTI Inc. All Rights Reserved. For more information on OMTI, visit www.omti.com

OMTI Inc., 851 California Dr., Burlingame, CA 94010

Program Basics

Logging in

Sign in to view your calendar, check account activity, get your pay statements, download shared case files and turn in jobs.

1. In the Log-In screen, enter your assigned user ID and password.

The screenshot shows a dark-themed login interface. At the top, there are two input fields: 'User ID:' containing the text 'bergda' and 'Password:' containing six black dots. Below these fields is a light gray bar with a 'Log In' button in the center.

2. Click **Log In** (or press the **Enter** key).

**TIP**

If you have forgotten your password, click **Forgot Password**. Enter your user ID in the Reset your password pop-up and click **Submit**. We will send an email to the address we have on file for you with a link to the page where you can reset your password.

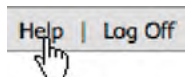
Program Basics

Navigating the site

Within RB Web, access the main areas, such as your account activity or job calendar, by clicking the buttons in the navigation bar near the top of the screen.

**NOTE**

Access this manual online by clicking **Help** in the navigation bar.



Program Basics

Exiting the site

Whenever you are logged in and have not clicked anything for a certain amount of time, you are automatically disconnected from the site. Instead of letting your time expire, log out when you have finished by either:

- Clicking **Log Off** in the navigation bar to return to the Log-In screen, or
- Closing your browser window.

**NOTE**

An alert box warns you shortly before automatically disconnecting you. Click **OK** to stop the process.

My Web

Reviewing & updating your personal information

Use the My Web area to update your contact information with us, such as your phone numbers and email address.

1. Click **My Web** in the navigation bar.
2. To change your contact information, click **My Profile**. You can change the information in any field and leave any field blank except required fields. Required fields appear in red with an asterisk (*) after the field label.
3. Click **Save**.



TIP

You can enter multiple email addresses in the **Email** field if you separate the addresses with commas.

My Web

Changing your user ID & password

You can change your user ID and password at any time.

1. Click **My Web** in the navigation bar.
2. To change your user ID, click **Change ID**.
3. Your current user ID appears above the **New ID** field. Enter your new ID and click **Save**.
4. To change your password, click **Change Password**.
5. Enter your current password in **Current Password**. Enter your new password in **New Password** and **Confirm Password**, and click **Save**.



WARNING

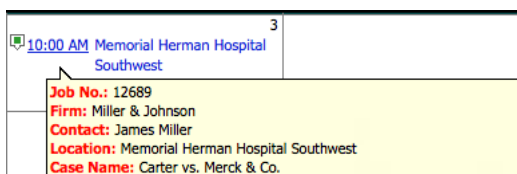
If you change your user ID and/or password, we will not have a record of your new user ID/password. Keep a copy of your new user ID/password in a safe place. If you lose your user ID/password, we can issue you a new one.

Calendar

Viewing your job calendar

Look up individual jobs assigned to you in a calendar as current as the one in the office. You can set your calendar viewing preferences, such as whether you want to see jobs in a list or monthly calendar format, and RB Web remembers them the next time you sign in. The monthly calendar format makes it easy to see which jobs have been cancelled, billed or shipped.

1. Click **Calendar** in the 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:
 - **Calendar** – To see jobs a month at a time.
 - **List** – To see jobs in a list format.
3. If you have the option, you can select one of the following in the **Calendar Type** drop-down:
 - **Assigned** – View your assigned jobs, including those that have been turned in, billed or cancelled.
 - **Client Of** – If you have your own clients, view their pending jobs so you can request the assignments. (See “Appendix: Requesting assignments.”)
 - **Sales Rep** – If you are a sales rep, view your clients’ scheduled jobs.
4. Limit the jobs shown by selecting one or more search filters in the **Search Criteria** pane:
 - **Job Date From/To** – To find jobs for different time periods, enter new beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
 - **Case** – To find jobs for a specific case, enter part of the case name into the field.
 - **Firm** – To find jobs for a specific firm, enter part of the firm’s name in the field.
 - **Scheduled Date From/To** – To find jobs scheduled during a specific period, enter beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
5. Click **Search**.
6. If viewing in calendar format, you can view the next month by clicking the right arrow button. View the previous month by clicking the left arrow button. Click the double arrow buttons to move the calendar one year at a time.
7. In calendar format, pause the cursor over a job time to see its job number, firm, attorney, location and case name.



Calendar

Viewing assigned jobs' details

Review individual assigned jobs in detail including their current status, appearance attorneys and their requested services. Add the job to your personal calendar. Get driving directions and job-related files. Contact resources who worked on the same case previously.

1. To see an assigned job's details, click its job number, job time or firm name (highlighted in blue) in the Calendar screen.
2. In the Calendar > Detail screen, the current information for the job you clicked appears. Status shows you where the job is in our workflow. To add this job to your desktop calendar, see "Adding jobs to your own calendar."



All job details shown are current in our system. Click **View PDF version** to view, download and print the job's worksheet.

Job Information		View PDF version	
Job No.	13592	Status	New
Date	10/17/2014 Add to my calendar	Time	09:00 AM ~ 11:00 AM
Time Zone	(GMT-06:00) Central Time (US & Canada)	Daylight Saving	Yes
Due Date	10/24/2014	Notation	
Job Type	Depo	Case No.	88-V-1234

3. In the Location section, click the link labeled **View Map** to see the map in a new window and get directions.

Location	Harris County Civil Courthouse 301 Fannin Houston, Texas 77002 View Map Contact: Madeleine Clifton (Trial Coordinator)
----------	--

4. Information on who is scheduled to attend and services they have requested appear under Ordering Information and Parties.

Ordering Information	
Firm	Berg Steiner & Chapman LLP
Contact	Daniel Berg
Phone No.	070-456-7894
Fax No.	
Ordered By	
Ordered Date	11/2/2014
Requested Services	Amicus Disk Copy w/ Original FedEx 2nd Day
Firm Calendar Notes	Always contact the firm secretary the day before a job to get any last-minute instructions.
Attorney Calendar Notes	Do not contact Mr. Berg directly. Always contact his secretary or paralegal first.

Parties		
Firm	Contact	Requested Services
Berg Steiner & Chapman LLP	Daniel Berg	Amicus Disk Copy w/ Original FedEx 2nd Day
Minker & Ellis LLP	Jack Minker	Amicus Disk

5. If available, information on resources who were previously assigned to the same case is listed under Previous Resources. To contact a resource, click the corresponding email address highlighted in blue or call the listed phone number.

Previous Resources			
Job Date	Witness	Resource	Email
12/5/2006	Hector Gardener, M.D.	Susan Lloyd	sloyd147@aol.com

6. Under **Repository Files**, any files uploaded to the repository for the case or jobs are listed. You have several options for downloading files:

- **For a single file** – Click the download (arrow) button next to the file you want to download.



- **For multiple files** – Check the boxes next to the names of all files you want to download, then click **Download checked files**.
- **For all files** – Check the box next to **Level** at the top of the grid, then click **Download checked files**.

7. Click **Back** (located at the bottom of the screen) to return to the Calendar screen.



TIP

If you would like a hard copy of the job assignment worksheet to take with you, click **View PDF Version**. From the PDF viewer, you can download or print the worksheet.

Calendar

Adding jobs to your own calendar

Jobs listed in your online calendar can be added to any third-party calendar, such as *Outlook*, that supports .ics files.

1. In the Date section of the Calendar > Detail screen of a selected job, click **Add to My Calendar** to add this job to your calendar.

Job No.	13214
Date	2/9/2011 Add to my calendar

2. Depending on your browser, operating system and calendar, your calendar might open automatically with a prompt for adding the job. Or an Opening Worksheet pop-up window will appear. In the Opening Worksheet window, choose either:

- **Open with** – To add the event directly to your calendar, select your calendar application.
- **Save File** – To add the event to your calendar later.

3. Click **OK**.



NOTE

If you chose **Open with**, the application you selected will automatically open and insert your calendar listing in the correct date. If you chose **Save File**, it will automatically open the application and insert your calendar listing when you open the saved .ics file.

Calendar

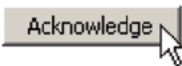
Acknowledging job assignments

When you receive an instant text message on your cell phone or an email from the office notifying you of a job assignment, you can acknowledge the assignment in three ways:

1. If you have the option, go to the calendar in our mobile app on your smart phone, select the job and choose **Acknowledge**. (See “Accessing your calendar on a wireless device.”)
2. Click **Reply** in your email program (such as *Microsoft Outlook*) to send a reply to the email sender (office).



3. Log into RB Web. In the Calendar screen, search for the job you want to acknowledge. Then click its job number, job time or firm name (highlighted in blue) to display details. In the Calendar Detail screen, click **Acknowledge** (at the bottom of the screen).



Calendar

Estimating pages and delivery dates

After taking a job, let the office know your estimated page count and delivery date. You can also enter personal notes concerning the job. These notes are for your reference only and cannot be accessed by anyone else.

1. In the Calendar screen, search for the job you want to estimate. Then click its job number, job time or firm name (highlighted in blue) to display details.
2. Under Estimated, enter the following applicable information:
 - **Estimated Pages** – Enter your page count estimate.
 - **Estimated Delivery Date** – Click the calendar button and select your estimated delivery date in the Date Navigator.
 - **Personal Notes** – Enter notes to yourself about the job, such as the clothes you wore.
3. Click **Save**. Or click **Back** to go back to the Calendar without saving your changes.

Turn-in

Turning in jobs online

You can turn in jobs online via one of two methods: Our Turn-in wizard guides you through five easy steps for entering billing information and uploading files. Or use the Advanced mode to turn in a job in only two screens. You do not have to turn in a job all at once or use only one mode on a single job. RB Web remembers your saved entries so you can complete turn-in at a later time and in a different mode.

1. Click **Turn-in** in the navigation bar.
2. In the main Turn-in screen, jobs you are still working on (i.e., not turned in) appear in chronological order with the oldest first. To change the order of the jobs, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order.
3. Choose a turn-in mode:
 - **Wizard mode** – If it is not selected by default, click its radio button to have the wizard guide you through five steps.
 - **Advanced mode** – Click its radio button to turn in the job in two screens.
4. If there are too many jobs to easily find the job you want to turn in:
 - Select one or more search filters in the **Search Criteria** pane, then click **Search** to limit how many jobs are in the list.
 - Choose between 10, 20 and 50 in the **Items per page** drop-down to limit how many jobs appear on this screen at a time.
5. In the results returned, click the job number of the job you are turning in to begin.
6. In the Job screen, enter the following applicable information:
 - **Case Name** – If this option has been enabled by the office, you can edit the case name.
 - **Case No.** – If this option has been enabled by the office, you can edit the case number.
 - **Rush** – Select **Yes** if this is a rush job.
 - **Notes for this job** – Enter special notes about this job for the office. Do not enter notes for each witness here. (See “Adding or updating witnesses.”)

**NOTE**

The number displayed under **Days Old** in the main Turn-in screen is how long the transcript is outstanding from the job date, not the due date, and excluding weekends.

**TIP**

If you're turning in a job that was previously turned in (e.g., a back order), select Turned-in in the **Status** drop-down. Then search for the job using either its job number or job date.

The screenshot shows a web form titled "Schedule" with the following fields and options:

- Schedule Type:** Scheduler
- Occurs:**
 - Daily
 - Weekly
 - Weekdays
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
 - Sunday
- Duration:**
 - Start Date: 12/21/2006
 - End Date: 01/11/2007
 - Start Time: 09:30 AM
 - End Time: 05:00 PM

7. Click **Next** to save your changes and go to the next screen. (Click **Cancel** to return to the main Turn-in screen.)
 - **If you are using the Turn-in wizard**, the next screen, Step 2 of 5: Witnesses defaults to New Witness if no witnesses have been added yet for this job. (See “Adding or updating witnesses.”) Otherwise, if other witnesses have been added already, they are listed in a data grid first.
 - **If you are using Advanced mode**, additional fields appear in the job screen.
8. In Witnesses, you can:
 - **Update an existing witness’s** information and/or upload related files – Click the witness name (Turn-in wizard) or the edit (pencil) button next to the witness name (Advanced mode).
 - **Add a new witness** – Click **here** in the sentence below the data grid (Turn-in wizard) or **New Witness** (Advanced mode).
9. Enter the witness information (see “Adding or updating witnesses”).
10. To add or update parties:
 - **In Turn-in wizard**, click **Next** to move to the Parties screen, then select from existing parties (see “Adding ordering parties automatically”) or click **here** in the sentence below the data grid to enter parties one at a time (see “Adding ordering parties manually”).

Step 3 of 5: Parties

Click a contact name to change or delete.

Sold To Firm	Sold To Contact	Original	COD	Bill To Firm	Bill To Contact	Invoice No.
Berg Steiner Chapman LLP	Daniel Berg	N	N	Berg Steiner Chapman LLP	Daniel Berg	7227
Charlotte Smith Reporting - Beaumont	Alice Smith	Y	N	Charlotte Smith Reporting - Beaumont	Alice Smith	7527

To add another party, click [here](#). Otherwise, click **Next**.

- **In Advanced mode**, click **Pre-fill Parties** to select parties from the job or previous turn-ins (see “Adding ordering parties automatically”), or click **New Party** to enter parties one at a time (see “Adding ordering parties manually”).

11. To add or update requested services:
 - **In Turn-in wizard**, click **Next**. In Step 4 of 5: Services, click **Yes** to use billing sets (see “Entering service items using billing sets & standing orders”) or **No** to enter services manually one at a time (see “Adding service items manually”).
 - **In Advanced mode**, click **Pre-fill Services** to select services from billing sets or clients’ standing orders (see “Entering service items using billing sets & standing orders”), or click **New Service** to enter services manually one at a time (see “Adding service items manually”).



NOTE

When using the Turn-in Wizard, Step 4 of 5: Services, if you do not see the choice to select billing sets in Services, you must enter service items manually. Click **here** in the sentence below the data grid to enter services one at a time. (See “Adding service items manually.”)

12. To complete turn-in, click **Next**.
13. In the Confirm and Submit screen, review the billing sheet. Click **Back** if you want to make any changes.

14. To keep a copy for your records, you can download a PDF of the billing sheet or print a hard copy.
15. Click **Submit**. The office is notified of your turn-in immediately.

**NOTE**

The ID of the agency's business unit that will bill the turned-in job appears in the top-right corner of the billing sheet for your reference.

Turn-in

Adding or updating witnesses

Enter information about witnesses and upload files. There is no limit to the number of witnesses you can enter for each job.

1. In the witness detail section, enter the following applicable information:
 - **Witness** (required) – Witness name. If there are no witnesses, enter the description, such as “Proceedings” or “Hearing,” in this field.
 - **Pages** (required) – Total number of pages.
 - **Begin Page** – Beginning page number. The default is “1.”
 - **End Page** – Ending page number is calculated automatically.
 - **Volume** – Volume number. The default is “1” if the beginning page number is “1.”
 - **Last Exh. Marked** – Number of the last exhibit marked for this volume.
 - **Actual Start Time** – Actual time the job started.
 - **Actual End Time** – Actual time the job ended.
 - **Send Original To** – This field keeps track of the original transcript. If the original remains in the office, leave it blank.
 - **Notes for this witness** – Provide detailed instructions for the production and billing departments for this witness.
2. To upload files, if you are using Advanced Mode, click **New File**. In the Turn-in wizard, the new file fields are already visible. For each file you are uploading, enter the following applicable information:
 - **Witness** (Advanced mode only, required) – Select the file's related witness in the drop-down.
 - **File Name** (required) – Click **Browse** to locate the file.
 - **File Type** (required)– Select a file type in the drop-down.
 - **Description** – Enter any text describing this file. If this file is published by the office, the description will be visible to clients on RB Web.

**NOTES**

When uploading files, if you are on RB8 Cloud but not using the latest version of your browser, a pop-up message will ask if you want to continue. You can continue using an old browser by clicking **OK**, but we advise you to always use the latest browser for security reasons and to avoid file errors in uploads.

After uploading a file, RB Web checks that the original and uploaded file sizes match. If the two file sizes don't match, the uploading process is cancelled, and you can try to upload the file again.

3. The Turn-in wizard automatically opens another new file section after you select a file to upload. If you are using Advanced mode, click **Save**. To upload more files, click **New File** again.
4. Repeat steps 2 and 3 for any additional files for this witness.



NOTES

You can delete a witness by clicking **Delete** in the witness detail screen, then clicking **OK** in the alert window.

If you do not want to turn in a file you selected to upload, you can click **Delete File** next to the **File Name** in the Witness detail screen before turning in the job.

Turn-in

Adding ordering parties automatically

After uploading files, the next step is to enter ordering parties. For each *party* entered here, RB8 will generate one invoice. Instead of entering one party at a time, select all of the parties who are ordering from lists of parties from the job or previous turn-ins.

1. In the Parties section of Turn-in, check the **Add** box next to each party you want to add. You can pick parties from both areas:
 - **From previous turn-ins** – If at least one other job on this case has been turned in previously, parties to the previous job(s) will appear here.
 - **From the job** – If the calendar department entered the parties when scheduling the job. The scheduling (noticing) party is always listed here.

The following parties are from previous turn-ins. Click the **Add** checkbox next to each party you want to add, indicate if original, select a rush type, then click **Next**.

Add	Sold To Firm	Sold To Contact	Bill To Firm	Bill To Contact	Original	Rush Type
Witness: Joseph Banks						
<input type="checkbox"/>	AKF Reporters	Ed Fulesday	AKF Reporters	Ed Fulesday	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	Berg Steiner Chapman LLP	Daniel Berg	Berg Steiner Chapman LLP	Daniel Berg	<input type="checkbox"/>	<input type="text"/>

The following parties are from the job. Click the **Add** checkbox next to each party you want to add, indicate if original, select a rush type, then click **Next**.

Add	Sold To Firm	Sold To Contact	Bill To Firm	Bill To Contact	Original	Rush Type
Witness: Joseph Banks						
<input type="checkbox"/>	Kirkwood & Johnson	David A. Martinez	Kirkwood & Johnson	David A. Martinez	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	Pettit & Martinez	Frank Pettit	Pettit & Martinez	Frank Pettit	<input type="checkbox"/>	<input type="text"/>

2. Check the **Original** box next to the party that is paying for the original.
3. If the party has asked for an expedited transcript, select the appropriate type in their **Rush** drop-down.
4. Click **Next** (Turn-in wizard) or **Save** (Advanced mode) to save your changes. If you have other parties to enter, see “Adding ordering parties manually.”



NOTE

To edit a party, click the **Sold To Contact** name (highlighted in blue) or the edit (pencil) button (Advanced mode). Then follow the instructions in “Adding ordering parties manually.”

To delete a party, click **Delete**. or the delete (X) button (Advanced mode). Click **OK** in the pop-up window.

Turn-in

Adding ordering parties manually

If you want to add more ordering parties, you can add them manually, one at a time.

- In the New Party section of Turn-in, enter the following information:
 - Original Contact** – Check the box if the party is paying for the original.
 - Sold To Firm** (required) – Click the lookup (magnifying glass) button to search for the firm. (See “Appendix A: Searching for firms.”)
 - Sold To Contact** (required) – With a firm selected, all contacts for that firm appear in the drop-down. Select a contact in the drop-down. If the ordering contact does not appear in the list, select New Contact in the drop-down, then enter the contact’s information in the New Contact screen.

The screenshot shows a web browser window titled "New Contact". The address bar shows a URL from "eprimo-base.com". Below the browser window is a table with the following data:

Firm Name	Rothstein & Ebenstein		
Address	50 Park Avenue 51st Floor New York New York 10015		
Phone	212-555-5995	Fax	

Below the table is a "New Contact" form with the following fields:

- Salutation: Mr. (dropdown)
- Gender: (dropdown)
- First Name:*
- Middle Name:
- Last Name:*
- Full Name:*
- Phone: 212-555-5995
- Fax:
- Email:

At the bottom right of the form are "Save" and "Cancel" buttons. A red asterisk indicates required fields.

- Same as Sold To** – If the billing party is same as the ordering party, check the box. RB Web will automatically fill in the next two fields.
 - Bill To Firm** (required) – If the billing party is different from the ordering party, click the lookup (magnifying glass) button to search for the firm to be billed.
 - Bill To Contact** (required) – With a firm selected, all contacts for that firm appear in the drop-down. Select a contact in the drop-down. If the bill to contact does not appear in the list, select New Contact in the drop-down, then enter the contact’s information in the New Contact screen.
- Under Witnesses, all witnesses previously entered are listed and selected.
 - If the party requested an expedited transcript**, select the time period in the **Rush Type** drop-down.
 - If the party is not ordering a particular witness**, clear the **Select** box next to the witness name.
 - Click **Next** (Turn-in wizard) or **Save** (Advanced mode) to finish adding the new party.

**NOTE**

If a party attended the deposition but did not order anything, check the **For attendance only** box.

Turn-in

Entering service items using billing sets & standing orders

After designating which party is ordering which witness, the next step is to enter service items for each order. Instead of entering one service item at a time manually, you can select one of the predefined billing sets to add several service items at once if your office has set up billing sets for online turn-in.

If you have ever ordered a combo meal at a fast food joint or a bento box lunch at a Japanese restaurant, then you already understand what RB8 billing sets are: Pre-set groups of items that speed up the selection process because you only have to choose the set, not all the individual items.

If clients have standing orders of service items they usually want from every job, those items will appear below billing sets. As with billing sets, you can pick and mix items from each group for each job.

1. In the Prefill Services section, select a **Billing Set** in the drop-down.
2. All of the service items contained in the selected billing set appear. Check the **Add** box next to each service item you want to add. Enter a different amount in **Units**, if desired.

Billing Set:

Add	Service Name	Units
<input checked="" type="checkbox"/>	Copy	1.00
<input checked="" type="checkbox"/>	Exhibit	1.00
<input type="checkbox"/>	Condensed/Index/ASCII Pack	1.00
<input type="checkbox"/>	Condensed Transcript	1.00

Click the **Prefill** checkbox next to each party name you want to add the selected service items for, then click **Save**.

Prefill	Firm	Contact	Witness	Original
<input checked="" type="checkbox"/>	Berg Steiner Chapman LLP	Daniel Berg	John Doe	N
<input type="checkbox"/>	Department of Labor and Industry	Charles Getty	John Doe	Y

If you want to add services from Preferred Services, click **Add** checkbox for correct witness and service name, then click **Save**.

Preferred Services

Add	Witness	Level	Service Name	Units
Daniel Berg of Berg Steiner Chapman LLP				
<input checked="" type="checkbox"/>	John Doe	Firm	Condensed Transcript	1.00
<input checked="" type="checkbox"/>	John Doe	Contact	Amicus Disk	1.00

3. Check the **Prefill** box next to each party name you want to add the selected service items for.
4. Under Preferred Services, all parties' standing requests, if any, appear. Check the **Add** box next to each service item you want to add.
5. Click **Save**.
6. Under Services, each party's order appears.
 - To delete a service item from an order, click its delete (X) button, then click **OK** in the alert window.
 - To update an order's service item, in the Turn-in wizard, delete it, then add it manually, updating the defaults as needed. In Advanced mode, click the service item's edit (pencil) button, then make changes in the service item fields and click **Save**.
 - To add a service item to an order, see "Adding service items manually."



NOTE

If you do not see the choice to select billing sets in Services, your office does not offer billing sets for turn-in. Instead, you must enter service items manually. (See "Adding service items manually.")

Turn-in

Adding service items manually

If your office does not provide billing sets of service items or you have any service items that do not fit into the normal billing sets, add them manually.

1. In the Add Service section, enter the following applicable information:
 - **Service Item** (required) – Select a service item in the drop-down.
 - **Units** (required) – Enter the number of units. The default is “1.”
 - **Split %** – If several parties are sharing the cost of this service item, enter the percentage allocated for this party (e.g., “50.000” for one half or “33.333” for one third).
 - **Remarks** – Enter any comments concerning this service item.
2. Check the **Order** box next to each witness name you want to add the selected service item for, then click **Save**.
3. Repeat steps 1 & 2 for any additional services.



NOTE

Delete a service item by clicking its delete (X) button in the Services grid, then click **OK** in the alert window.

Activity

Viewing financial 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 the details of any invoice.

1. Click **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 From/To** – To find invoices for different time periods, enter new beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
 - **Job No.** – To find invoices for a job, enter the job number into the field.
 - **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**.

5. All potential matches to the information you entered appear. To change the order of the invoices, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order.
6. To view, print, or save the list as a PDF, click **View PDF version**.
7. Click an invoice number (highlighted in blue) for more details.
8. In the Activity > Invoice Detail screen, all information is read only. A red COD warning appears next to the invoice number if it is a C.O.D. invoice. Click **Back** (located at the bottom of the screen) to return to the Activity screen.



Activity > Invoice Detail

All invoice details shown are current in our system.

Job Information

Job No.	13059	Date	10/17/2014
Case Name		Case No.	
Ordering Firm	Jones Reporting Service, Inc.	Ordering Contact	Ester Rocha
Ordered By		Client Matter No.	

Invoice Detail

Invoice No.	7441 ***COD***	Date	11/2/2014
Bill To Firm	Jones Reporting Service, Inc.	Bill To Contact	Ester Rocha
Sold To Firm	Jones Reporting Service, Inc.	Sold To Contact	Ester Rocha
Pay Amount	\$ 114.50	Resource Paid	

Witness	Pages	Begin	End	Volume	Last Exh
Ted Dodson	20	1	1	1	
	Item			Units	Amount
				20.00	\$ 56.00
				1.00	\$ 2.50

Back



TIP

Make it easier to find what you want by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many invoices appear on the screen at a time.

Pay Statement

Viewing pay statements

If you no longer receive a hard copy of the resource payroll report with each paycheck, view and print out your current and past payroll reports on RB Web.

1. Click **Pay Statement** in the navigation bar.
2. In the **Search Criteria** pane, specify the following parameters:
 - **Year** – Select a year in the drop-down.
 - **Pay Date** – After a year is selected, all pay dates for the selected year appear in the drop-down. Select a pay date in the drop-down.
 - **Show Detail** – To see invoices with details, select Yes in the drop-down.
3. Click **Search**.
4. All of the invoices paid on the selected pay date appear. To change the order of the invoices, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order. Sorting does not work when viewing with details.
5. To view, print, or save the list as a PDF, click **View PDF version**.

Repository

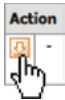
Accessing shared files

If you are assigned to a job on a case that other reporters have worked on before, you can download copies of their files on the case, such as the word list, dictionary and exhibits, from the online repository. This is also where you can access relevant files that the office has uploaded.

1. Click **Repository** in the navigation bar.
2. In the Repository screen, your assigned jobs for the current month-to-date appear. Limit the jobs shown 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 From/To** – To find jobs for different time periods, enter new beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
 - **Job No.** – To find a specific job, enter the job number.
3. Click **Search**. All files that meet the search criteria appear.
4. Click the job number (highlighted in blue) to see the associated files available for download.

5. In the Repository > Job screen, under Files, you have several options for downloading files:

- **For a single file** – Click the download (arrow) button next to the file you want to download.



- **For multiple files** – Check the boxes next to the names of all files you want to download, then click **Download checked files**.
- **For all files** – Check the box next to **Level** at the top of the grid, then click **Download checked files**.

6. Click **Back** (at the bottom of the screen) to return to the Repository screen.



TIP

Make it easier to find what you want by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many files appear on the Repository screen at a time.

Repository

Sharing files

If you work on jobs for cases that other reporters work on too, you can upload relevant files, such as your dictionary and exhibits, to the repository for them to share.

1. In the Repository screen, click the job number (highlighted in blue) you want to upload files for. (Refer to “Accessing shared files” for search instructions for finding a job in the Repository.)
2. In Repository > Job, click **New**.
3. In the New File section that appears below the data grid, enter the following applicable information:
 - **File Name** (required) – Click **Browse** to locate the file.
 - **File Type** (required) – Select a file type in the drop-down.
 - **Description** – Enter any text describing this file.
4. Click **Save** to upload the file. Or click **Cancel** to close the New File section without uploading the file.

Repository

Accessing your personnel files

In addition to storing your transcripts, other job files and invoices online, we can also store files related to transactions between us or other information you need. Examples of these types of files include contracts and other legal forms.

1. In the Repository screen, click **Reporter Repository**.
2. To download and view files:
 - **For a single file** – Click the download (arrow) button next to the file you want to download.
 - **For multiple files** – Check the boxes next to the names of all files you want to download, then click **Download checked files**.
 - **For all files** – Check the box next to **Level** at the top of the grid, then click **Download checked files**.

Master Word List

Compiling your own word lists

You can export a Master Word List for all ASCIIs belonging to the same case, for several ASCIIs in a case, or for a single ASCII file. You can export word lists as either PDFs (readable in Adobe Reader) or as text files.

1. Click **Master Word List** in the navigation bar.
2. To find a case, use one or more search filters in the **Search Criteria** pane:
 - **Case** – Enter part of the case name into the field.
 - **Job No.** – Enter the job number.
3. Click **Search**.
4. All cases that meet the search criteria appear. To find ASCII files related to a case, click the case name in the search results.
5. All case-related ASCII files appear. To select the file(s) for your master word list:
 - **Single file** – Check the box next to the job number of the file you want to create a word list for.
 - **For multiple files** – Check the boxes next to the job numbers of all files you want in your word list.
 - **For all files shown** – Check the box next to **File Name** at the top of the grid.
6. Click **Create Master Word List**.
7. In the Create Word List pop-up, select the file format of your word list:
 - **PDF** – Click the radio button, then click **Next**. In the PDF detail screen, select visual formatting options for the PDF, and choose to include or exclude a word count in the **Word Count** drop-down under Others.
 - **Text** – Click the radio button, then click **Next**. In the Text detail screen, choose to include or exclude a word count in the **Word Count** drop-down.
8. Click **Export**. RB8 creates and exports the master word list to your desktop.

begins (1)	boxes (2)	cakes (2)	cheaters (1)
BEHALF (7)	brackets (6)	call (91)	check (7)
believe (30)	brakes (1)	call, (1)	checked (1)
believed (1)	branch (1)	called (94)	Checking (1)
believes (1)	brand (2)	calling (13)	Cherry (1)
bell (4)	brand-new	calls (8)	Chevelle (2)
belong (1)	(3)	cameras (3)	Chevrolet
belonged (3)	Break (17)	Canadian (1)	(1)
best (14)	breaks (1)	CAPACITY (9)	chop (18)
Bethany (3)	Brett (4)	captain (2)	chose (1)
better (11)	Brett's (1)	car (185)	chuckled (2)
bifocals (1)	briefly (1)	card (1)	circle (1)
big (8)	bring (11)	care (3)	circled (1)
biggest (1)	broadcasts	career (2)	circumstance

**TIP**

Make it easier to find what you want in search results by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many cases appear on the screen at a time.

**NOTE**

If you cannot find the case you want to generate a word list from, ask staff to create Transcript Packages for the case. Only ASCIIs that are bundled into Transcript Packages are available on RB Web for word list creation.

Availability

Viewing your schedule & requesting time off

View your assigned jobs, open time slots and time off in monthly charts. Make online requests for time off. Then monitor the status of your requests.

1. Click **Availability** in the navigation bar.
2. Your current month's time sheet appears as a list of days, and each column represents a 30-minute increment over a 24-hour period (military time). Scroll to other months using the left and right arrows next to the month and year calendar title.

March 2011

Unavailable Available Assigned

Day	Reason	Remarks	Status/Action
28 Mon	Personal	3/28/2011 7:00:00 AM - 3/28/2011 12:30:00 PM Doctor's appointment	Pending/Cancel

3. To request time off, click **Request Time-off**.
4. In Availability > Request Time-off, enter your request:
 - **Date** (required) – Click the calendar buttons and select dates in the pop-up Date Navigators. You cannot select the next business day for your request.
 - **Time** (required) – Select start and end times in the drop-downs.
 - **Reason** (required) – Select the general reason for your request in the drop-down.
 - **Remarks** – Enter an explanation if needed for your request.
5. Click **Save** to send your request. In the alert that appears, Click **OK**.
6. Your request appears in the Time-off grid with a Pending status. If you want to remove the request, click **Cancel**. In the alert that appears, Click **OK**.



NOTE

When you request time off, the system automatically generates a support ticket for your request. You can check the status of your requests and send comments to the office about your request in Support. See “Tracking your requests & solving problems.”

Firms

Looking up firm information

Look up a firm's street address and get driving directions. Find contact information for the firm's employees and send them email.

1. Click **Firms** in the navigation bar.
2. To find a firm, use one or more search filters in the **Search Criteria** pane:
 - **Firm Name** – Enter part of the firm's name into the field. (Minimum number of characters: two.)
 - **City/Town** – Enter part of the firm's location into the field. (Minimum number of characters: two.)
3. Click **Search**.
4. All firms that meet the search criteria appear, including their address and firm type. To get driving directions or contact information, click the firm name in the search results.
5. In Firms > Firm Detail, the firm's contact information appears, including a list of employees and their contact information. All information is read-only.
 - **To get driving directions** – Click **View Map** in the Address section. The location map appears in a separate window where you can access directions.
 - **To send an email** – Click the email address for the contact you want to correspond with. Your email program automatically opens with the address in the **To** field.

**Firms > Firm Detail**

All firm details shown are current in our system. Click **View Map** for location map and driving directions.

Firm Information			
Firm Name	Berg Steiner & Chapman LLP		
Address	510 Louisiana Street, 2nd Floors Houston, Texas 77042 View Map		
Main Phone	713-555-1234	Fax	713-842-2609
Firm Type	Law Firm		

Contacts			
Name	Contact Type	Direct Phone	Email
Daniel Berg	Attorney		adefendant@bsc.com
Christian A. Carrillo, Esq.	Attorney		adefendant@bsc.com
Lisa Johnson	Paralegal		pdefendant@bsc.com
Sandy Smith	Secretary		hdefendant@bsc.com

**TIP**

Make it easier to find what you want in search results by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many firms appear on the screen at a time.

Support

Tracking your requests & solving problems

Use the support ticket system to ask questions and get help from our staff. It also tracks your time-off requests and sends you email alerts as the status of your support tickets changes. When an issue is resolved, close out the ticket and rate your experience.

1. Click **Support** in the navigation bar.
2. All of your outstanding support tickets appear in chronological order, oldest listed first. You can:
 - **Change the order of the tickets** – Click the **Ticket No.** heading to reverse the order.
 - **Limit which tickets appear** – Use Search filters to see only open or closed tickets for a specific time period.
 - **Limit how many tickets appear at a time** – Choose a value in the **Items per page** drop-down.
3. To view a support ticket's details, click its ticket number (highlighted in blue).
4. In Support > View Ticket, the ticket's history appears.
 - **To update the ticket**, make an entry in **Comment** and click **Update Ticket**. The ticket's status changes to Awaiting Response, and our staff is notified with a system alert.
 - **To close the ticket**, click one of the rating buttons under Close Ticket.

Support > View Ticket

Request time-off from Bill Nelson

Bill Nelson said: (3/25/2011 12:48:00 PM)

Start Time: 2011-03-28 07:00:00
 End Time: 2011-03-28 12:30:00
 Reason: Personal
 Remarks: Doctor's appointment

Update Ticket

Comment *

Close Ticket

In order to close your ticket, please click on one of the buttons below.

5. To make a new request, click **New Ticket**.
6. In Support > New Ticket, enter your information:
 - **Subject** (required) – This will appear as your ticket's heading in your list of outstanding tickets.
 - **Description** (required) – Be as detailed as necessary.
7. Click **Save** to send your request to the office. Your request is issued a ticket number and appears in the ticket queue so you can track it.