

Your Field Guide to
SUCCESS
with **RB8**



2008 Green Edition

Your Field Guide to Success with RB8

Introduction

Welcome to the RB8 Field Guide to Success, 2008 Green Edition. In this second edition of the Field Guide, we are again highlighting aspects of RB8 you may not know about.

With a green theme, this edition features information that could help you provide better service to your clients, save money, and reduce your company's impact on the earth through using less resources and being more efficient.

This Field Guide contains ideas from real RB users on ways to “green” your business and even get your reporters on board. It also features step-by-step instructions for using important new features in the latest version of RB8.

We hope you find this information helpful and that you keep this guide handy and refer to it often.

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Mason Farmani, Barkley Court Reporters

Going green saves more than the planet

As Managing Partner of Barkley Court Reporters, Mason Farmani and his team are always looking for innovations to implement that improve both their services and their bottom line. In the past few years, Barkley has become a leader in greening the court reporting industry, which would seem to run counter to a focus on the bottom line. Everybody knows, green is more expensive, right? Or does Mason know something we don't?

In his popular presentations on “going green,” Mason lays out his case that not only can the court reporting community help the environment, they can also save a lot of money by switching from traditional processes to green practices. “I show you that you can save \$120,000 on \$10 million by going paperless,” Mason says.

Speeding up traditional processes

For example, the traditional way of preparing a transcript involves a lot of steps, like printing and binding, that use a lot of supplies and energy and take a lot of time to complete. Mason uses a video demonstration in his talks to contrast that with using RB8 to prepare a PDF transcript and using RB Web to publish it online. “The first way is very, very long — we even fast-forward through it. It's very entertaining, but also, people came up to me later to say they hadn't seen it like this before, ‘but now I'm going to go paperless, no matter what.’”

NOTE

Areas of cost savings by going paperless:

- Copier maintenance
- Copier leasing
- Copy paper
- Toner
- Binding
- Tabs
- Delivery
- Human resources
- Storage

Of course, for some businesses that is too radical a step to start with, so Mason advocates a stepped approach to going green, what he calls “two shades of green.”

Shades of green

“If you want to do the minimum, you can just use recycled paper and recharged toner cartridges,” explains Mason. “You save money with the recharged cartridges, so even with paying extra for recycled paper, you still come out ahead of the game, and you are doing something that makes a difference.”

The deeper shade of green is to go paperless, and this is where the cost savings really add up. By reducing or eliminating expenses for copiers, supplies and human resources, Barkley will save a few hundred thousand per year with their paperless system.

“A firm doesn't have to do this all in one day,” Mason stresses. “Some people are afraid that their clients won't like it, that they will lose clients. But I know a courageous agency that did do it in one day, and they haven't lost one client.”

There are other financial benefits as well with a paperless system. For example, by emailing invoices and statements from RB8 to clients, Mason has found, “They get more attention and have a better rate of return [than mailing]. You save postage, and the invoice doesn't sit on their desk.”

Seriously green

Barkley has made a serious commitment to being green. In fact they are the first and only government-certified court reporting agency in the U.S. Becoming certified green requires an even higher level of commitment, addressing four areas of resource consumption: energy conservation, water conservation, solid waste reduction/recycling, and pollution prevention.

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Mason Farmani, Barkley Court Reporters

Going green saves more than the planet

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There are regulations to follow in running your business and some strict guidelines for setting up your offices. For example, “you have to change the toilets to low flow. And you have to change the lights and put devices in the rooms so the lights go off automatically when no one is in the room.”

This level of commitment can’t be achieved overnight. Mason reports it took four months to get everything they needed done. It covered everything, down to “we had to get recycling bins, and order all of our printed material on recycled paper.”

Inspiring the green in others

Mason and Barkley Court Reporters are proud of their green certification and use it in their marketing materials. They will always be the first to be certified, but Mason hopes they won’t always be the only one. “That’s our mission, our goal — to not only do it at Barkley, but to do it and do it so well that others would be inspired to follow.”

NOTE

Green URLs

Interested in greening your office? Check out these websites:

- Find information on greening your office and getting certified:
www.greenbiz.ca.gov/GreenResources.html
- Download a comprehensive checklist for green certification:
www.sfenvironment.com/greenbiz/how.htm
(click on Office/Retail Checklist)
- Learn about Energy Star equipment for small businesses:
www.energystar.gov/smallbiz
- Find recommendations on energy-efficient computers and servers, plus tips on saving energy at the office:
www.climatesaverscomputing.org
- Find green-certified computers, notebooks and monitors:
www.epeat.net
- Find reputable recyclers for obsolete hardware:
www.ecycle.org and www.computertakeback.com
- Learn about environmental papers and find recommendations for copy paper:
www.conservatree.com
- Read government regulations, advice, tips and news about environmental practices:
www.epa.gov

Irene Rennillo, Rennillo Court Reporting, Records & Media

Getting reporters to embrace change

For Irene Rennillo and Rennillo Court Reporting, Records & Media (RCRRM), an important reason for purchasing RB8 and RB Web was to continue their company mission of providing exceptional service to their clients. As an attorney and president/chief operating officer of RCRRM, Irene is in a unique position in the legal support industry to know exactly what their attorney clients need and what new services will be beneficial to them.

RB Web has become an important part of RCRRM's services. Not only for the obvious benefits of online case repositories and calendars, but also how the whole system — including the resource side — helps RCRRM be more responsive by easing communications, reducing expenses and speeding up transcript turn-around.

The way it was

Before RB Web, reporters sent in an MS Word form email as a worksheet. These were printed and attached to a case file. When completed, the transcript was sent in to the production department, sometimes with an updated worksheet. “There was a lot of paper,” Irene said, “And a lot of wasted time looking for paper files.”

In addition, reporters would typically hold onto exhibits for reference until they turned in a transcript, delaying scanning and delivery.

With between 30 to 35 independent contractor reporters and a turn-in system that wasted paper and time, Irene was motivated to get everyone using RB Web paperless turn-in. But how to implement such a big change without everything devolving into chaos and failure?

TIP

RB Web roll-out checklist:

- Total commitment from company leadership
- Detailed written instructions (manual) for reporters
- One-on-one training
- Realistic schedule
- Staggered roll-out

The strategy

Irene acknowledges that she encountered resistance at first but, “as a leader, we have to be strong and supportive,” she said, “And you will get the change that you know will be in the best interest of all.”

In addition to a firm, clear directive, Irene provided reporters with a lot of practical support: “To support them, much like we support our internal staff with Standard Operating Procedures, we gave all reporters detailed instructions with pictures [see the Reporter Turn-in document], and we made appointments for one-on-one training.”

The whole process took about one month to get everyone in the office and trained. Irene reports it took a few more months to get them using it without flaw.

They made the transition in stages: “We brought the reporters on in groups, starting with the most tech-savvy reporters, who we knew would be glad to dispense with written worksheets,” Irene said, “Then on down to the legacy reporters who wish they were still writing to paper.”

The benefits

With a clear plan and a staggered roll-out, Irene reports that they encountered few obstacles. “Those who understood that they were in a technology profession, got the system quickly and appreciated our investment.”

Plus, all of the reporters benefited from the move to RB Web. With online turn-in, the written worksheet was eliminated. And, “we also instituted a process in which the title and appearance on continuing jobs is archived at the case level. This saves reporters huge amounts of time.”

Irene can list a number of benefits her reporters appreciate about RB Web:

- RCRRM assigns reporters on jobs in the future, which they see on their calendar.
- Their payroll information, both past and future, is always accessible.

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Irene Rennillo, Rennillo Court Reporting, Records & Media

Getting reporters to embrace change

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- Important information, such as word lists, is stored at the case level and accessible to reporters working on a case.
- Title and Appearance pages are also deposited at the case level so that additional reporters on ongoing cases don't reinvent. They know who will be in the room, saving them time with their T&A and preventing client annoyance.
- Reporters know that they are gaining access directly into RCRRM's internal system — they have the peace of mind of knowing that RCRRM is an open book to them.

More benefits

Other benefits encompass in-house staff and clients too. For example, because reporters are not required to come into the office, “they used to hang on to paper exhibits from the deposition in order to use them in finalizing their transcripts,” Irene said. “However, this delayed getting them to the office for scanning and delivery in a timely fashion with the transcript.”

With RB8 and RB Web, exhibits are stored in the system at the case level. “Now, reporters drop exhibits off immediately, knowing that they have access to them in the archive,” Irene said. “Reporters turn in their exhibits sooner because they know they'll have access to them sooner. This in turn prevents the delay of exhibit delivery to the client, so clients also have faster access to the exhibits.”

It might seem like a small, simple change, but it impacts both reporters and clients in a positive way. It also helps the in-house staff manage their time better and reduces the use of paper and other resources. Other digital processes in the RB system help too, such as email notifications to reporters of jobs (no more written job sheets) and the ability of reporters to access the firm database to enter new firms themselves. (RCRRM produces new contact reports each day to keep their data clean.)

With so many benefits for everyone involved, RB Web is a valuable addition to any office. And with a clear plan, supportive management and a realistic schedule, it can be implemented with a minimum of disruption for everybody.

TIP

Stored in repository at case level for reporters to access:

- Word lists
- Title & Appearance pages
- Exhibits

Central Repository

Storing resource-related documents

Like the repositories for case, job, witness, invoice and firm in RB8, you now have a place in the central repository to store all resource-related documents, such as signed contracts.

1. Go to **Setup > Resources**.
2. In the Search Criteria pane, provide information for one (or more) of the filters, then click **Search** (or press **Alt + S**).
3. RB8 lists all of the resources that meet the specified search conditions. Right-click the resource you want to upload documents for, then choose **View**.
4. In the Resource window, click the **Resource-level Repository** tab to upload any documents you have for this resource to the central repository.

Resource Blast

Searching for resources at the last minute

When a client puts you in panic mode by calling in a last-minute job, use this new function to send out an email (or SMS) blast to all of the qualified resources at once.

1. In the Calendar Manager, right-click the job you need to cover, then choose **Resource Blast**.
2. In the Search Criteria pane, enter search filters as needed, including the maximum number of miles from the job to the resource's home address, then click **Search** (or press **Alt + S**).
3. Right-click on the grid, then choose **Check All** to select all of the displayed resources at once.
4. Right-click on the grid, then choose **Send Email** to send an email blast to all of the resources selected.
5. Right-click on the grid, then choose **Send SMS** to send a text message blast to all of the resources selected.

Quick Assignments

Assigning resources quickly

If you have too many jobs to assign daily by the standard method, RB8 now provides an override option to assign resources quickly without clicking.

1. Go to **Calendar > Quick Assignments**.
2. RB8 displays all of the jobs for the next day automatically. Click the right (or left) arrow to display the jobs for a different date.
3. In the Search Criteria pane, type a part of the resource's name, then press the **Enter** key.
4. RB8 lists all of the resources that meet the specified search condition in the Search Results section. Use the down (or up) arrow to highlight the resource you want, then press the **Enter** key to assign the selected resource to the job.
5. RB8 automatically highlights the next job on the grid.
6. Repeat steps 3 and 4 until all jobs are assigned.

Notes Log Filters

Segregating notes using filters

Sometimes it will be useful to extract only certain types of notes from various logs in RB8. For example, you might want to print all of the notes in the Collection Info tab, excluding the notes created by the system.

1. In any notes log, click **Filter**.
2. In the drop-down, all items are selected by default. Click **Check All** to select all items. Click **Uncheck All** to clear all checkmarks at once. Items with no checkmark are automatically removed from the display.
3. Right-click on the grid to print or export the list.

Global Clipboard

Using the global clipboard

In RB8, any grayed-out field with a binoculars button next to it is a lookup field. You cannot type any text in those fields. You have to click the button to browse for a record. However, you can copy the text from these lookup fields in one function, then paste into the same type of fields in another function.

1. To copy, right-click any lookup field, then choose **Copy to RB8 Clipboard**.
2. To paste, right-click any lookup field, then choose one of available paste options.

TIP

If you want to change the maximum clipboard count, go to **Personal > User Preferences > Clipboard**.