

*Your Field Guide to*  
**SUCCESS**  
with **RB8**



**2009 Tan Edition**

# Introduction

Welcome to the 2009 edition of “Your Field Guide to Success with RB8.” This edition provides step-by-step instructions for the newest modules in RB Web 8: e-commerce, full-text search (optional plug-in) and video streaming (optional plug-in).

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## E-commerce module

E-commerce (electronic commerce) is the buying and selling of goods and services on the Internet, especially the World Wide Web. RB Web 8's e-commerce module enables clients to pay invoices (including COD invoices) online via PayPal, a trusted third party for electronic payments, then download transcripts immediately.

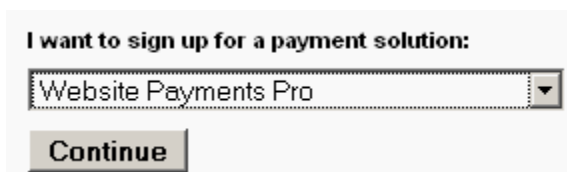
Create Account

### ***Signing up with PayPal***

For e-commerce, RB Web integrates with PayPal which is the most widely recognized and respected independent third-party company specializing in processing online credit card transactions.

If you don't have a business account with PayPal, create one to accept payments on RB Web.

1. Launch your web browser and go to [www.paypal.com](http://www.paypal.com).
2. Click the **Business** tab.
3. Click **Create Account**.
4. Click **Get Started** under the Business category.
5. In the **I want to sign up for a payment solution** drop-down, select **Website Payments Pro**, then click **Continue**.



I want to sign up for a payment solution:

Website Payments Pro

Continue

6. Complete the enrollment forms by following the onscreen instructions.

Security

### **Creating API credentials**

An Application Programming Interface (API) allows PayPal to communicate with your RB Web online office directly so your clients do not leave your site to make an online payment. To integrate RB Web's e-commerce with PayPal, generate your API credentials, then add them to your RB Web.

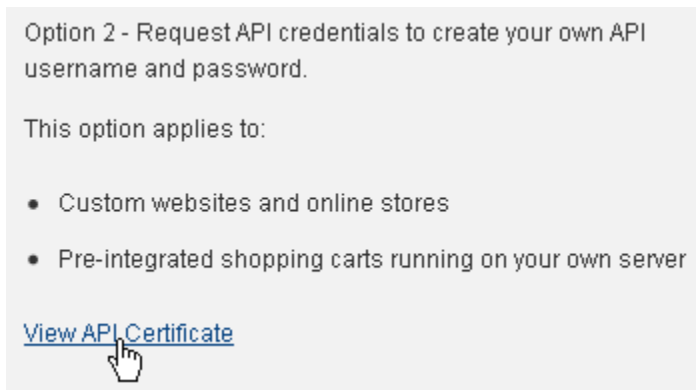
1. Launch your web browser and go to [www.paypal.com](http://www.paypal.com).
2. Log in to your account.
3. Click **Profile** under the **My Account** tab.
4. Click **API Access** under the **Account Information** category.
5. Click **View API Certificate** in the Option 2 box.

Option 2 - Request API credentials to create your own API username and password.

This option applies to:

- Custom websites and online stores
- Pre-integrated shopping carts running on your own server

[View API Certificate](#)

A screenshot of a web interface showing a section titled 'Option 2 - Request API credentials to create your own API username and password.' Below this title, it says 'This option applies to:' followed by two bullet points: 'Custom websites and online stores' and 'Pre-integrated shopping carts running on your own server'. At the bottom of this section, there is a blue hyperlink that says 'View API Certificate' with a mouse cursor icon pointing at it.

6. Select **Request API signature**, then click **Agree and Submit**.

**Request API signature** if your shopping cart or solution provider has asked for an API username, password, and signature, or if you're developing a custom shopping cart.

7. On the menu bar in RB8, click **Tools > Web > Site Configurations**.
8. Click the **Pay Invoices** tab.

- Copy API Username, API Password and Signature from the PayPal web page, then paste them into the corresponding fields in RB8.

Credential	API Signature
API Username	sales_api1.omti.com
API Password	M. 4PP' JJxH, 5A92
Signature	A-0xztPyV3SY4hY0dzKS0ok8W7JdANoSr

PayPal Information

User Name:	sales_api1.omti.com
Password:	*****
Signature:	A-0xztPyV3SY4hY0dzKS0ok8W7JdANoSrbvbl

- Click the **Accessibility** tab.
- Check the **Allow** box next to **Pay Invoices** (in the Contact Module section) to enable the e-commerce module in RB Web.
- Click **Save**.

## COD Invoices

**Publishing COD invoices**

In RB8, COD invoices are not posted, so as a default, they do not appear when clients go to the Activity section of RB Web. However, with RB Web's e-commerce module, you have an option to 'publish' COD invoices to allow the clients to pay for and download transcripts that were billed COD.

1. On the menu bar in RB8, click **Billing > Cod Invoices**.
2. In the Search Criteria pane, specify the filters, then click **Search** (or press **Alt + S**).
3. RB8 lists all of the COD invoices that meet the specified search conditions. Right-click the invoice(s) you want to publish on RB Web, then choose **Set Publish on Web**.

Invoice No.	Invoice Date	Invoice Amount	COD	Publish on Web
7350	8/11/2009	452.65	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7348	7/27		<input checked="" type="checkbox"/>	<input type="checkbox"/>
7346	7/14		<input checked="" type="checkbox"/>	<input type="checkbox"/>
7344	7/10		<input checked="" type="checkbox"/>	<input type="checkbox"/>
7342	7/7		<input checked="" type="checkbox"/>	<input type="checkbox"/>
7335	6/25		<input checked="" type="checkbox"/>	<input type="checkbox"/>
7333	6/23		<input checked="" type="checkbox"/>	<input type="checkbox"/>
7318	5/18		<input checked="" type="checkbox"/>	<input type="checkbox"/>
7300	4/23		<input checked="" type="checkbox"/>	<input type="checkbox"/>

**NOTE**

To 'unpublish' COD invoices, right-click the invoice(s) you want to unpublish on RB Web, then choose **Clear Publish on Web**.

Accessibility

### **Controlling online transcript access**

Before e-commerce was available, any client who was billed for transcripts was able to download transcripts from RB Web whether invoices were paid or not unless invoices were marked COD. With e-commerce now built into RB Web, you can restrict downloads to only those transcripts that are fully paid for.

1. On the menu bar in RB8, click **Tools > Web > Site Configurations**.
2. Click the **Accessibility** tab.
3. In the Contact Module section, under Transcripts, there are two new checkboxes:
  - **Allow file downloads when the invoice (original) is fully paid** – Check this box if the invoices for originals must be fully paid before transcripts can be downloaded. Since originals are normally billed to your good clients, you might want to leave this checkbox blank so as not to irritate your client base.
  - **Allow file downloads when the invoice (copy) is fully paid** – Check this box if the invoices for copies must be fully paid before transcripts can be downloaded. Since copies are normally billed to non-clients, you might want to check this box to improve your collections.

Transcripts	<input checked="" type="checkbox"/>
- Allow file downloads when the invoice (original) is fully paid	<input type="checkbox"/>
- Allow file downloads when the invoice (copy) is fully paid	<input checked="" type="checkbox"/>

4. Click **Save**.



Pay Invoices

***Paying invoices online***

You can now pay invoices (including COD invoices) on RB Web using credit cards. RB Web e-commerce is fully integrated with PayPal for security and convenience.

1. Log in to RB Web.
2. Click **Pay Invoices** in the navigation bar.
3. In the Pay Invoices screen, all open (unpaid) invoices appear, sorted by invoice number.
4. Click the **Pay** checkbox next to each invoice you want to pay.
5. Click **Pay Invoices**.
6. In the screen that follows, enter the credit card and billing information, then click **Pay Now**.



**NOTE**

The above instructions are for clients using RB Web to make online payments.

Receivables

***Crediting online payments***

RB generates payment transactions in Receivables automatically from online PayPal payments made by clients in RB Web.

1. When a confirmation is received from PayPal that an online payment has been credited to your business account, a payment transaction will be automatically generated in RB8 crediting invoices selected by clients in step 4 of “Paying invoices online.”
2. At the end of each day, post these credit card payments along with other payments you entered in Receivables.

## Full-text search plug-in

In a full-text search, the search engine examines all of the words in every document stored in a database, as it tries to match search words supplied by the user. However, directly scanning the contents of each document looking for matches is very slow and impractical. Instead, RB Web's full-text search plug-in first scans the text of all the documents and builds a list of search terms, called an index (concordance). Then, when performing a specific search, only the index is referenced rather than the text of the original documents. With this plug-in, your clients can search through hundreds of transcripts belonging to a particular case in a matter of seconds.

Requirements

### ***Is your system ready?***

RB Web 8's full-text search plug-in utilizes the string-matching technology available in Microsoft SQL Server. To activate the full-text search plug-in for RB Web 8, your SQL Server must be one of the following:

- SQL Server 2000 Standard or Enterprise Edition
- SQL Server 2005 Workgroup, Standard or Enterprise Edition
- SQL Server 2008 Web, Workgroup, Standard or Enterprise Edition



#### IMPORTANT

MSDE 2000 (a free version from Microsoft) does not support full-text search. If you are using MSDE 2000 as your SQL Server, we recommend that you upgrade to SQL Server 2008 Web Edition. It is available from Microsoft for \$15 a month.

Supported document types

### ***Is your document compatible?***

For RB8 to scan a document and build an index, the document must be one of the following file types:

- PDF (text portion only)
- *MS Word*
- *MS Excel*
- *MS PowerPoint*
- Rich Text Format (rtf)
- HTML
- All text formats



#### NOTE

At this time, image files (e.g., scanned exhibits) are not supported. Once we fully implement an Optical Character Recognition (OCR) module (currently under development), RB8 will be able to extract text information from image-based documents.

Create Full-Text


**Building an index**

The first step in implementing full-text searching is to build an index. This is easy — you just specify a case and file types. RB8 will do the rest.

1. On the menu bar in RB8, click **Production > Repository**.
2. In the Search Criteria pane, specify the filters, then click **Search** (or press **Alt + S**). For example, if your client wants to search through all PDF transcripts belonging to a particular case, enter the following information:
  - **File Types** – Select PDF Transcript in the drop-down.
  - **Case** – Click the binoculars button to select the case.

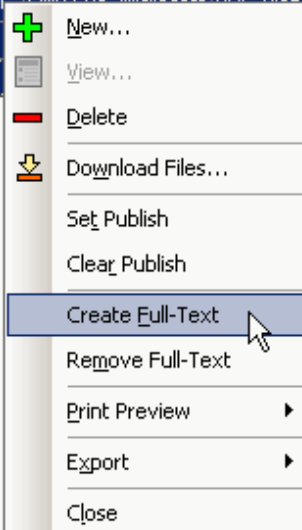
Repository Level:

File Types:

Case:  
 

3. RB8 lists all of the files that meet the specified search conditions. Right-click the file(s) you want to index, then choose **Create Full-Text**.

Level	Job No.	Job Date	Case Name	File Type	File Name	Witness	Publish	Full-Text
Witness	10973	11/20/2006	OMTI vs. Microsoft	PDF Transcript	11655.pdf	Bill Gates	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Witness	10974	11/27/2006	OMTI vs. Microsoft	PDF Transcript	11656.pdf	Yong Lee	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Witness	11763	4/19/2007		Transcript	11763.pdf	Yong Lee	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Witness	12092	6/30/2008		Transcript	4075.pdf	Dr. Ted	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The context menu includes the following options: New..., View..., Delete, Download Files..., Set Publish, Clear Publish, **Create Full-Text** (highlighted), Remove Full-Text, Print Preview, Export, and Close.

**TIP**

If the Case field in the Search Criteria Pane is left blank, RB8 will build an index for all PDF transcripts stored in the repository. However, this might take many hours, so it is recommended that you do the initial building during non-business hours.

- As each file is indexed, the corresponding **Full-Text** checkbox is marked.



**NOTE**

To remove files from the index, right-click the file(s), then choose **Remove Full-Text**.

Repository Search

***Searching online repository***

Using our full-text search feature, you can now search through hundreds of transcripts in a matter of seconds.

- Log in to RB Web.
- Click **Repository Search** in the navigation bar.
- Search for transcripts by selecting one or more search filters in the **Search Criteria** pane:
  - Word(s) to search for** – Type the word or phrase you are looking for in the box.
  - Search Type** – Select **All of the words**, **Any of the words** or **The exact phrase** in the drop-down.
- Click **Search**. All potential matches to the information you entered appear.
- Click the download (arrow) button next to the file you want to view or download.



**NOTE**

The above instructions are for clients using RB Web to make full-text search queries.

## Media streaming plug-in

With streaming media (audio or video), a web user does not have to wait to download a file to play it. Instead, the media is sent in a continuous stream of data and plays as it arrives. An important advantage of streaming media technology (unlike either traditional or progressive downloads) is the copyright protection it provides. No copy of the content is left on the receiving device. Therefore, the recipient can neither alter nor redistribute the content in an unauthorized manner.

### Requirements

#### ***Is your system ready?***

Providing true media streaming requires specialized software (known as media server software) and dedicated hardware. RB Web 8's media streaming plug-in utilizes *Wowza Media Server* software, which is considered to be one of the best *Flash* streaming server software currently on the market. To provide media streaming in RB Web 8, your media-dedicated system must include the following:

- Dual-core processor computer
- Minimum 1GB of RAM per core
- RAID 0 or RAID 10 configurations with at least 2 or more disks in the array
- Any Windows operating system
- *Java Runtime Environment (JRE) 5 or 6*
- *Wowza Media Server* (see note)
- Port 1935 (RTMP port) opened on your firewall
- *Flash Player* (on clients' computers)



#### NOTES

RB Web 8's media streaming plug-in comes with **Wowza Pro10** edition (a free version) that supports a maximum of 10 concurrent connections. To provide an unlimited number of concurrent streaming connections, purchase **Wowza Pro Unlimited** edition. It is available from Wowza for \$995.

*Flash* is an application that creates files that stream their content to browsers very quickly. It is an industry standard for presenting media on the web.

### Supported document types

#### ***Is your document compatible?***

RB Web 8's media streaming plug-in supports the following media types:

- *Flash* media content (.flv) – *recommended*
- MP3 content (.mp3)
- H.264/HE-ACC media content (.f4v, .mp4, .m4a, .mov, .mp4v, .3gp, and .3g2)

Transcripts

### Viewing streaming video

You don't have to wait to receive DVDs; you can view them anytime, anywhere you have Internet access, with the click of a button. You will need *Flash Player* installed on your computer to view videos in streaming mode.

1. Log in to RB Web.
2. Click **Transcripts** in the navigation bar.
3. In the Transcripts screen, any available transcripts and videos (if available) for jobs taken in the past month appear. Search for transcripts by selecting one or more search filters in the **Search Criteria** pane:
  - **Uploaded Date** – To see transcripts for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigator.
  - **Case** – To find transcripts on a specific case, enter part of the case name into the field.
  - **Witness** – To find a specific witness, enter part of the witness's name in the field.
  - **Job Date** – To find transcripts for a specific job date range, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigator.
  - **Contact** – To find transcripts for a specific attorney, select one in the drop-down list.
4. Click **Search**.
5. All potential matches to the information you entered appear. Click the plus (+) sign in front of the witness name to see the associated files available for viewing.

	Witness	Job Date
+	Dr. Yong Lee	11/27/2006
	William H. Gates	11/27/2006

6. Click the play (right arrow) button next to the file you want to view.



Play button (on right)



**NOTE**

If you are unable to view streaming video following these instructions, you must install the *Flash Player* on your computer. Visit the following site to download and install the correct version of *Flash Player* for your system:

[http://www.macromedia.com/shockwave/download/index.cgi?P1\\_Prod\\_Version=ShockwaveFlash](http://www.macromedia.com/shockwave/download/index.cgi?P1_Prod_Version=ShockwaveFlash)

The above instructions are for clients using RB Web to view streaming video.