rb8

RB8 legal support firm software

Tracking Module User Guide

Tracking Module

Use RB8's Tracking module to monitor jobs as they move through your production workflow. First, set up the module to fit into your workflow. Then track transcripts, exhibits, video, so you always know the current status. Produce reports to document your process.

Table of Contents

Code Manager

Setting up tracking items

The first set-up task is to create items that can be tracked for any job. Typical tracking items for court reporting and video production firms are shown in the illustration for step 3 below.

1. On the menu bar in RB8, click **Tools > Code Manager.**

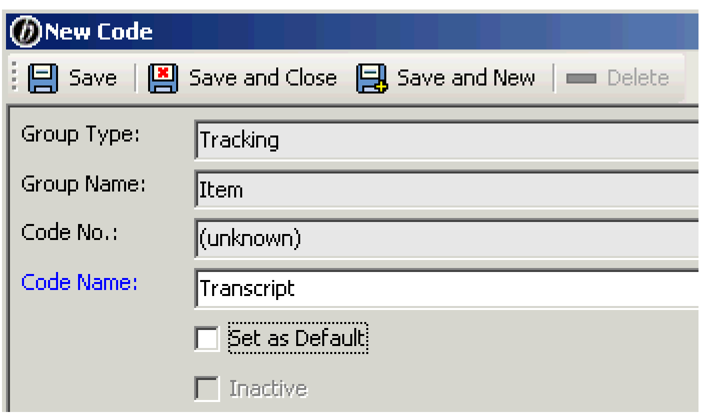
2. On the left side of the Code Manager window, folders appear representing the main categories. Click the "+" next to **Tracking** to open the folder, displaying its subcategories underneath.

3. Click the **Item** subcategory to display all of the values entered so far as a grid in the Results (right) pane.

Name	Code	Default	Inactive
DVD	1520	☐	☐
Editing	1301	☐	☐
Exhibit	1561	☐	☐
Scanning	1563	☐	☐
Synching	1537	☐	☐
Transcript	1521	☑	☐

4. To add a new item, click **Actions** (or right-click on the grid), then choose **New.**

5. In the New Code window, **Code No.** is not an input field and is generated by the system automatically when you save. Enter the following information:
   - **Code Name** – Enter a unique name for this item.
   - **Set as Default** – Check this box to make the item appear as the default choice.



6. Click **Save and Close.**

7. Repeat steps 4 through 6 to enter additional items.

Tracking Steps

Setting up tracking steps

After setting up items to be tracked, create steps that each item goes through in the production workflow.

1. On the menu bar in RB8, click **Production > Tracking** > **Tracking Steps.**

2. In the Search Criteria pane, select an item in the **Tracking Item** drop-down, then click **Search.** RB8 lists all of the steps entered so far.

	Sequence	Step Name	Due Days	Inactive	Notify
	1	Reporter Login	0	☐	David Hall
	2	Out to Transcriber	4	☐	
	3	Out to Edit	3	☐	
	4	Rough Print	1	☐	
	5	Out to Notereader	3	☐	
	6	Proofing	1	☐	
	7	Exhibits	1	☐	
	8	Final Print	0	☐	
	9	Job Turned in	0	☐	Yong Lee

3. Click **Actions** (or right-click on the grid), then choose **New.** In the New Tracking Step window, enter the following information:
   - **Step Name –** Enter a description for this milestone.
   - **Due Days –** Enter the maximum number of days a job can stay in this step, if applicable.
   - **Users to notify –** Click **Add** to add user(s) to be notified when this step is completed.

4. Click **Save and Close.**

5. Repeat steps 3 and 4 to enter additional steps.

TIP

To move a step to a different place in the workflow order, right-click the step and choose either **Upward Sequence** or **Downward Sequence.**

Code Manager

Setting up archival status codes

Before starting to track work, specify codes for different areas in tracking. The first set of these codes, Archival Status, describes the current archival status of original media, such as video tapes. Typical entries are shown in the illustration for step 3 below.

1. On the menu bar in RB8, click **Tools > Code Manager.**

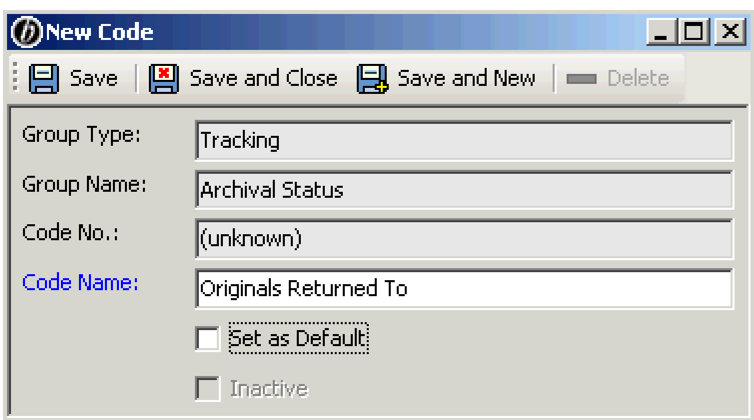
2. On the left side of the Code Manager window, folders appear representing the main categories. Click the "+" next to **Tracking** to open the folder, displaying its subcategories underneath.

3. Click the **Archival Status** subcategory to display all of the values entered so far as a grid in the Results pane.

Name	Code	Default	Inactive
	1350	☑	☐
Archived Here	1352	☐	☐
Originals Destroyed	1354	☐	☐
Originals Sent To	1353	☐	☐
Pending	1351	☐	☐

4. To add a new archival status, click **Actions** (or right-click on the grid), then choose **New.**

5. In the New Code window, **Code No.** is not an input field and is generated by the system automatically when you save. Enter the following information:
   - **Code Name** – Enter a description for this archival status.
   - **Set as Default** – Check this box to make the code appear as the default choice.



6. Click **Save and Close.**

7. Repeat steps 4 through 6 to enter additional archival status.

Code Manager

Setting up media classification codes

The next set of codes to add deals with media classification. Typical media classification codes are shown in the illustration for step 3 below.

1. On the menu bar in RB8, click **Tools > Code Manager.**

2. On the left side of the Code Manager window, folders appear representing the main categories. Click the "+" next to **Tracking** to open the folder, displaying its subcategories underneath.

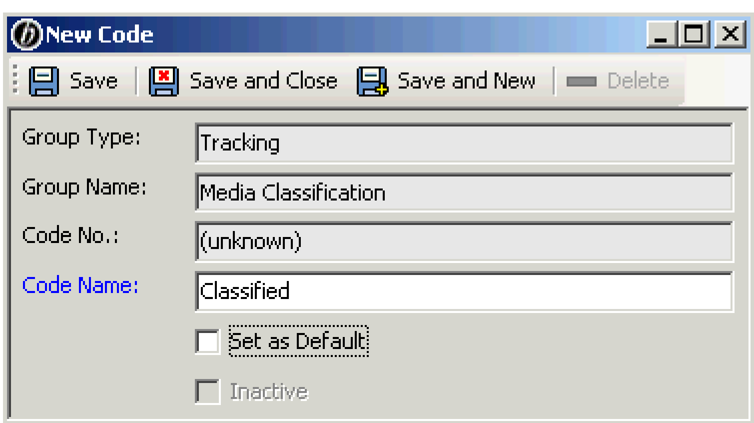
3. Click the **Media Classification** subcategory to display all of the values entered so far as a grid in the Results pane.

	Name	Code	Default	Inactive
▶		1340	☑	☐
	Attorney's Eyes Only	1510	☐	☐
	Confidential	1509	☐	☐
	Highly Confidential	1513	☐	☐
	Restricted	1512	☐	☐
	Under Protective Order	1511	☐	☐

4. To add a new media classification, click **Actions** (or right-click on the grid), then choose **New.**

5. In the New Code window, **Code No.** is not an input field and is generated by the system automatically when you save. Enter the following information:

   - **Code Name** – Enter a description for this media classification.
   - **Set as Default** – Check this box to make the code appear as the default choice.



6. Click **Save and Close.**

7. Repeat steps 4 through 6 to enter additional media classifications.

Code Manager

Setting up media format codes

The next set of codes to add deals with media format. Typical media format codes are shown in the illustration for step 3 below.

1. On the menu bar in RB8, click **Tools > Code Manager.**

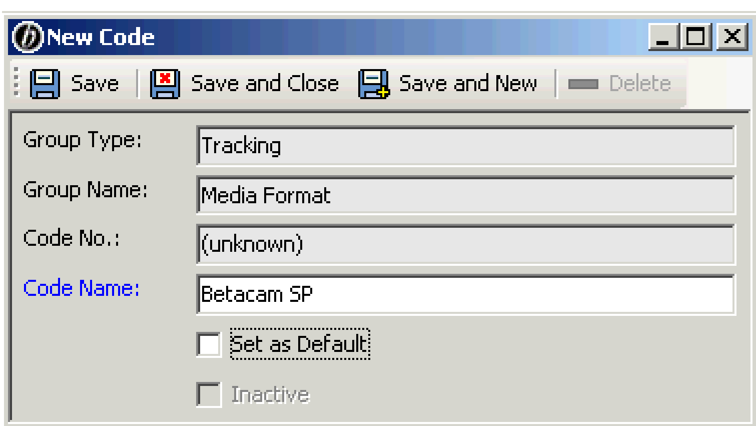
2. On the left side of the Code Manager window, folders appear representing the main categories. Click the "+" next to **Tracking** to open the folder, displaying its subcategories underneath.

3. Click the **Media Format** subcategory to display all of the values entered so far as a grid in the Results pane.

Name	Code	Default	Inactive
	1330	☑	☐
Audio Tape	1519	☐	☐
CD	1331	☐	☐
DV-CAM	1515	☐	☐
DVD-R	1332	☐	☐
Hi-8	1517	☐	☐
MiniDV	1516	☐	☐
S-VHS	1514	☐	☐
Tape	1333	☐	☐

4. To add a new media format, click **Actions** (or right-click on the grid), then choose **New.**

5. In the New Code window, **Code No.** is not an input field and is generated by the system automatically when you save. Enter the following information:
   - **Code Name** – Enter a description for this media format.
   - **Set as Default** – Check this box to make the code appear as the default choice.



6. Click **Save and Close.**

7. Repeat steps 4 through 6 to enter additional media formats.

Code Manager

Setting up priority codes

The final set-up task is to add priority codes. Typical priority codes are shown in the illustration for step 3 below.

1. On the menu bar in RB8, click **Tools > Code Manager.**

2. On the left side of the Code Manager window, folders appear representing the main categories. Click the "+" next to **Tracking** to open the folder, displaying its subcategories underneath.

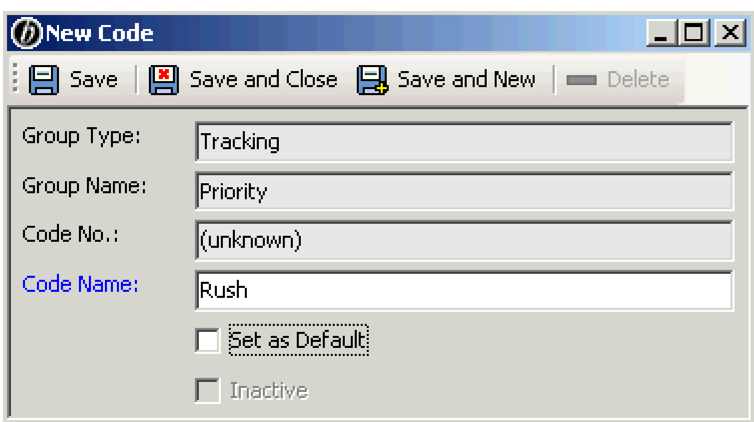
3. Click the **Priority** subcategory to display all of the values entered so far as a grid in the Results pane.

	Name △	Code	Default	Inactive
▶		1320	☑	☐
	High	1321	☐	☐
	Normal	1323	☐	☐
	Urgent	1322	☐	☐

4. To add a new priority code, click **Actions** (or right-click on the grid), then choose **New.**

5. In the New Code window, **Code No.** is not an input field and is generated by the system automatically when you save. Enter the following information:

   - **Code Name** – Enter a description for this priority.
   - **Set as Default** – Check this box to make the code appear as the default choice.



6. Click **Save and Close.**

7. Repeat steps 4 through 6 to enter additional priority codes.

Tracking Manager

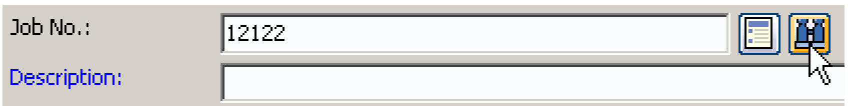
Starting new tracking

Tracking can be initiated as soon as a job is created (scheduled).

1. On the menu bar in RB8, click **Production > Tracking** > **Tracking Manager** (or press **Ctrl + Alt + T).**

2. Click **Actions** (or right-click on the grid), then choose **New.**

3. In the New Tracking window, enter a job number, then press **Enter** or click the binoculars (browse) button.



4. Enter the following information:
   - **Description** – The default is the witness name entered when the job was created. Modify the description, if needed.
   - **Item** – Select a tracking item in the drop-down, if different from the default.
   - **Due Date** – The default is the job's due date. Change the date, if needed.
   - **Priority** – Select a priority code in the drop-down.
   - **Units Expected** – Enter the number of units ordered.
   - **Units Delivered** – Enter the number of units delivered so far.
   - **Manager** – If applicable, click the binoculars button to select the manager who will oversee this tracking item.
   - **Turn-in Witness** – This is rarely used and mainly provided here for backward compatibility with RB7. If the witnesses have been entered for this job already using the Turn-in function, you can select a witness in the drop-down.
   - **Contact** – This is rarely used and mainly provided here for backward compatibility with RB7. If the (ordering) parties have been entered for this job already using the Turn-in function, you can select a contact in the drop-down.
   - **Remarks** – Enter any special notes for this tracking item.

5. Click **Save.** Two more tabs—**Steps Log** and **Notes Log**—appear. The **Steps Log** records the history of tracking step changes and is un-editable. To record your own notes in the Notes Log, see "Making notes" in the RB8 User Guide.

Tracking Manager

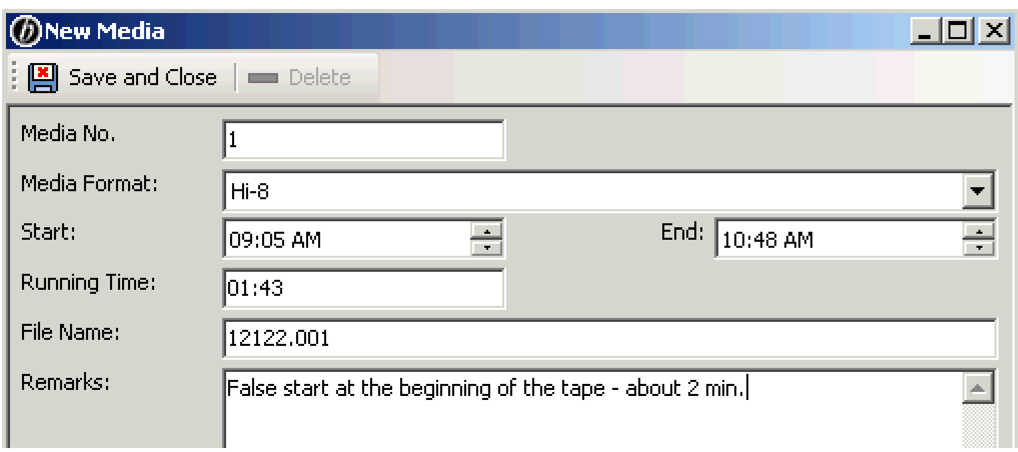
Entering video information

If a deposition was videotaped, use the Media tab to enter information regarding the source tapes and their archival status.

1. In the Tracking window, click the **Media** tab.

2. Click **New** in the Media Sets section.

3. In the New Media window, enter the following information:
   - **Media No.** – Enter a sequential number starting with 1. This will be used to print media labels (e.g., Tape 1 of 4).
   - **Media Format** – Select a media format in the drop-down, if different from the default.
   - **Start** – Enter the beginning time.
   - **End** – Enter the ending time.
   - **Running Time** – The total run time is calculated automatically.
   - **File Name** – Enter the name of the digitized file.
   - **Remarks** – Enter any special notes.



4. Click **Save and Close.**

5. Repeat steps 2 through 4 to add additional media.

Tracking Manager

Moving work to the next step

When the work is completed in the current step, you "push" the item to the next step in the workflow.

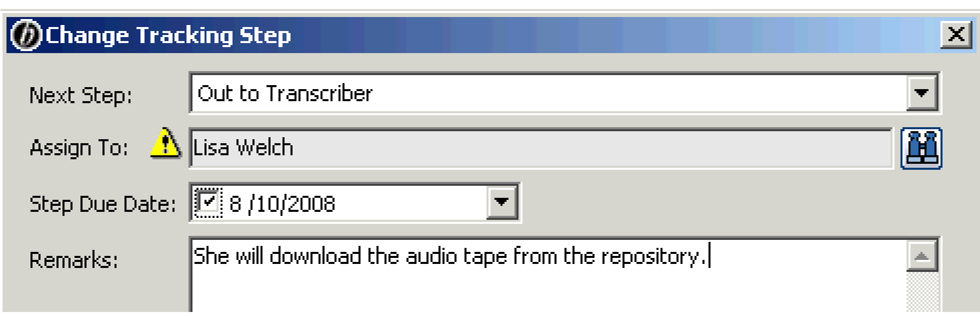
1. On the menu bar in RB8, click **Production > Tracking** > **Tracking Manager** (or press **Ctrl + Alt + T).**

2. In the Search Criteria pane, specify the filters, then click **Search** (or press **Alt + S).**

3. RB8 lists all of the tracking items that meet the specified search conditions. Right-click the tracking item you want to move to the next step, then choose **View.**

4. In the Tracking window, click **Actions** > **Change Step.**

5. In the Change Tracking Step window, enter the following information:
   - **Next Step –** The default is the next step in the workflow. You can select a different step in the drop-down to move forward or backward, skipping any steps.
   - **Assign To –** Click the binoculars button to assign the selected tracking item to a particular resource, if applicable.
   - **Step Due Date –** The default is calculated based on the Due Days specified in **Production > Tracking > Tracking Steps.** (See "Setting up tracking steps.")
   - **Remarks** – Enter any special notes.



6. Click **OK.**

7. Click the **Steps Log** tab if you want to see the complete history of tracking step changes.

IMPORTANT

If you move to the last step in the workflow, RB8 will automatically complete the tracking item by changing the status from "*Incomplete*" to "*Completed*." The **End Date** will default to today's date.

Tracking Manager

Generating task lists

A *task list* (also a to-do list or call list) is a list of tracking items (jobs) to be worked on. Since every court reporting business operates differently, RB8 provides numerous filters to accommodate every need. Using the Tracking Manager function, you can bring up tracking items:

- That are currently at certain tracking steps.
- That are assigned to a particular resource.
- Based on job date, item due date or step due date.
- That belong to a particular manager or business unit.
- That are incomplete.
- For a single case.
- For a single job.
- For a single firm or contact.

1. On the menu bar in RB8, click **Production > Tracking** > **Tracking Manager** (or press **Ctrl + Alt + T).**
2. In the Search Criteria pane, specify the filters.
3. Click **Search** (or press **Alt** + **S).**
4. RB8 lists all of the tracking items that meet the specified search conditions. Right-click any tracking item, then choose **View** to view or update any details of the selected tracking item.

Tracking tools

Additional tools for tracking

RB8 provides several preset reports designed to give you quick and easy means to analyze the tracking side of your business.

Productivity Analysis

Do you want to find out how many tracking items have been finished on time? Analyze productivity by item, by step, by manager or by resource with RB8's Productivity Analysis.

Daily Task Summary

Use the Daily Task Summary to list all jobs finished within a specified period.

For current information on OMTI and ReporterBase software and services, visit www.omti.com.

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