ReporterBase 8

Legal Support Firm Software

RB8 Essentials

Workflows, common terms, FAQs & important concepts

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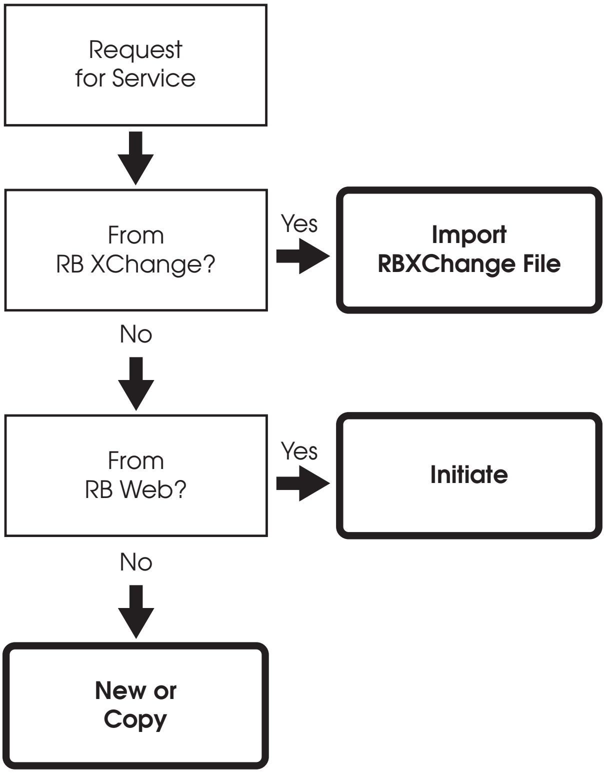
ReporterBase 8 Essentials Guide

For current informaiton on ReporterBase software and services, visit www.omti.com/rb.

OMTI Inc.
3420 Bristol St., Suite 400
Costa Mesa, CA 92626

Calendar Workflow

Calendar daily procedure I



Request for service is received via phone, fax, email, regular mail, RBXChange or RB Web.

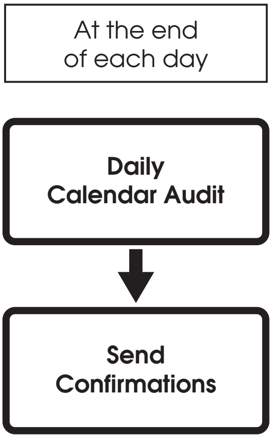
If you refer jobs to other court reporting firms or get job referrals yourself, you can save time and reduce errors when exchanging jobs with other firms who also use RB with RBXChange.

When you are notified of a client's online job request, view and initiate the job.

Using the **Calendar Manager,** create a new job. If this is a new request on a continuing case, save time and reduce errors by copying (replicating) an existing job.

Calendar Workflow

Calendar daily procedure II

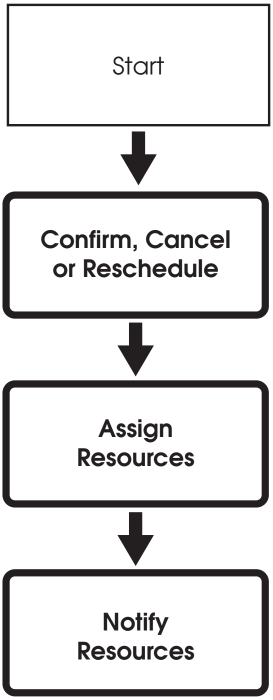


Do you want to find out how many jobs been added to the calendar today or this week? Analyze new job settings and cancellations. Also, audit new entries for mistakes and typos.

Send clients acknowledgement of scheduling or cancellation via email.

Calendar Workflow

Calendar daily procedure III



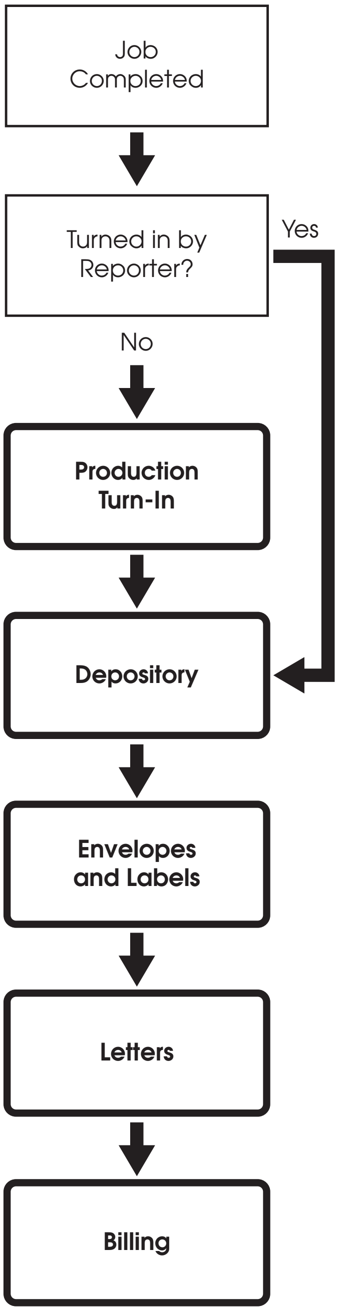
Using the **Calendar Manager,** you can confirm, cancel or reschedule all of the next day's jobs.

After a job is confirmed, schedule a resource or resources for the job.

After assigning resources, the next task is notifying resources.

Billing Workflow

Billing daily procedure



When resources turn in their jobs on RB Web, the office is notified via the Message Center.

If resources don’t do their own turn-in, your production department enters witnesses and parties to bill from the billing sheet.

Upload files (such as transcripts and exhibits) to RB8’s Depository, then publish them for clients and resources.

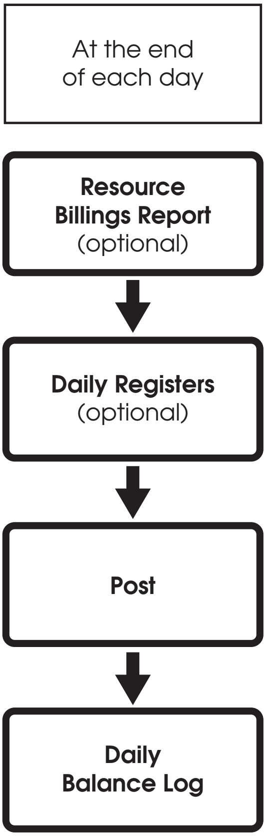
Print envelopes and labels for invoices and other correspondence.

Use RB8’s extensive variety of form letters to correspond with attorneys, witnesses and others.

After verifying turn-in information, select rate tables and enter miscellaneous charges. Calculate, post and print invoices.

Receivables Workflow

Receivables daily wrap-up procedure



When you generate an invoice in RB8, resources' earnings are generated simultaneously. If your firm currently provides resources with copies of their invoices, you can provide them with this report instead.

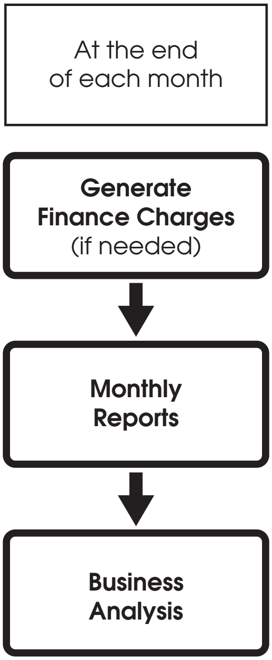
The Sales Register lists all invoices generated today. The Cash Receipts Register-Payment lists all payments entered today. The Cash Receipts Register-Other lists all other transactions such as credit/debit memos, voids, and write-offs.

All daily transactions (such as invoices, payments, credit memos, etc.) are temporary until posted (i.e., closed out). Once posted, they can't be modified or deleted.

Check your Accounts Receivable (A/R) balance each day to protect your business against accounting errors and fraud. See what increased or decreased the balance for a specific period.

Receivables Workflow

Receivables monthly wrap-up procedure



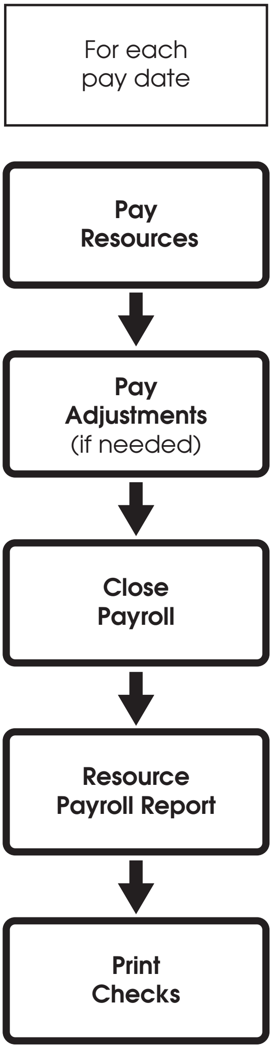
To assess a finance charge for each overdue invoice for a particular client, first set up a finance charge rate for the client. Then RB8 generates finance charges for each invoice more than 30 days old by multiplying the rate by the current balance.

Recommended reports are: Monthly Journals (for your CPA), Aged A/R (for your banker) and Statements with open invoices (for your overdue clients).

Get an instant snapshot of your business. Compare the current month-, quarter- and year-to-date totals to the previous period.

Payables Workflow

Payables payroll procedure



Review a specific pay date's invoices, grouped and subtotaled by resource. Review and modify RB8's automatic selection of invoices for any resource. You can also reset (restart) incorrect payroll.

Correct errors in calculating resource pay by entering pay adjustments for a specific pay date. Generate recurring deductions, if applicable.

You must close (i.e., finalize) payroll before you can print checks or the final version of the Resource Payroll Report.

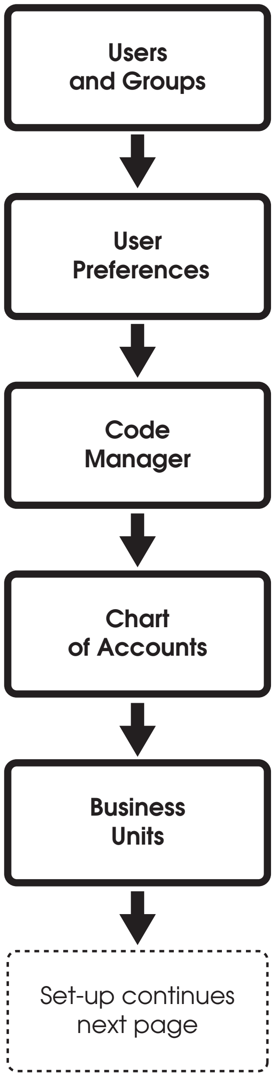
Once the payroll is closed, you can print the final copy of the resource payroll report. This report along with a check will be mailed to each resource. However, if you have RB Web, resources can view their pay statements (current and past) online eliminating the need to print and mail these reports to them.

You can print resource payroll checks directly from RB8, export them to *QuickBooks* or export them in NACHA (National Automated Clearing House Association) format for direct deposits.

Setup Workflow

Set-up procedures suggested order

Before using RB8, enter information about your company, clients and reporters, billing and pay rates, and other default information in the appropriate Setup tables. This flow chart suggests an optimum order to entering information, but you can enter or change information in any Setup table at any time.



To access RB8, you need a *User* account. In addition to program access, your user account authorizes what actions you can perform in RB8. The permissions for these actions come from which *Security Group* or groups you belong to. (in **Tools** menu)

Before using RB8, configure your workstation and set your custom defaults. Preferences entered here apply to your workstation only. They do not affect any other computers you might be connected to. (in **Personal** menu)

Drop-down menus allow users to choose an entry from a list RB8 includes initial values for drop-down menus used throughout the system. You amend these values using a tool called *Code Manager.* (in **Tools** menu)

Although RB8 is not a general accounting system, it still needs certain account numbers to keep track of sales, cash receipts, accounts receivable, resources payable and other transactions.(in **Setup** menu)

Business Units are your company's revenue centers or any entity in your business that you want to track separately, such as branch offices, other companies you own, affiliates and profit-sharing operations. (in **Setup** menu)

Setup Workflow

Set-up procedures suggested order — continued

Set-up continued

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Service Items Master

Regular charges that you bill to your clients are called *service items* in RB8. Service items are listed on your invoices to provide itemized details for your clients and third-party payers. In-house, they provide information to help you analyze your revenue streams. (in **Setup** menu)

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Rush Type Master

The *Rush Type Master* lists all of the the different expedited (rush) deliveries you provide along with their default billing and pay information. It drastically reduces the number of rate tables a typical court reporting firm needs. (in **Setup** menu)

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Billing Rate Groups

The structure for grouping billing rate tables in RB8 is called the *Billing Rate Group.* Set up a billing rate group, then attach firms to it and create its related billing rate tables. (in **Tools > Code Manager** menu)

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Billing Rates

For each billing rate group, create as many billing rate tables as you need. (in **Setup** menu)

↓

Pay Rate Groups

RB8 has a structure for grouping related pay rate tables similar to Billing Rate Groups. A resource must be connected to a pay rate group. (in **Tools > Code Manager** menu)

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Set-up continues next page

Setup Workflow

Set-up procedures suggested order — continued

Set-up continued

Pay Rates

For each pay rate group, create as many pay rate tables as you need. (in **Setup** menu)

Billing Sets

Billing Sets contain service items that are usually billed together. (in **Setup** menu)

Invoice Headers

RB8 automatically generates a standard invoice header for each witness based upon your input. Create your own custom headers for specific circumstances, and organize them into groups to save you time locating one when billing. (in **Setup** menu)

Invoice Messages

You can create and group messages in a similar way to invoice headers, which can then be selected and modified on individual invoices. (in **Setup** menu)

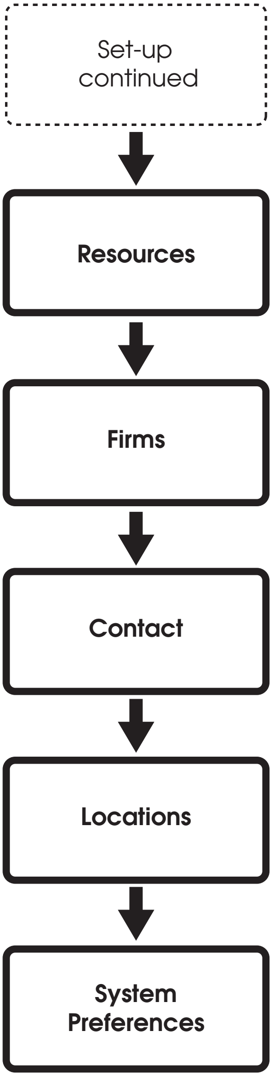
Pay Groups

If resources have different pay dates and cutoff dates, group them according to their pay period (frequency). These *Pay Groups* are unrelated to Pay Rate Groups, which classify resources according to their pay tier. (in **Tools > Code Manager** menu)

Set-up continues next page

Setup Workflow

Set-up procedures suggested order — continued



Resources provide your business with a service or support. Reporters, videographers, interpreters, scopists, and account executives (sales reps) are examples of resources. They can also be other reporting agencies that cover jobs for your firm, or your in-house conference rooms. (in **Setup** menu)

Firms are entities you do business with, such as law firms, other court reporting firms, vendors, insurance companies, corporate clients and courts. The Firms table is your address book and information file on all of these entities. (in **Setup** menu)

Contacts are individuals who work for firms you do business with, such as attorneys, paralegals, secretaries, claim adjusters, court clerks and other contacts. The Contacts table is where data on all of these individuals is stored. (in **Setup** menu)

A *Location* is a place where a job takes place, such as a court room or law office. Since law firms and courts are normally entered in the Firms table as "firms," use the Locations table for other types of locations where jobs recur, such as private residences, doctors' offices, conference facilities or schools. (in **Setup** menu)

System Preferences is where you set the options for your RB8 system. It contains all the preference settings that affect all the users. (in **Tools** menu)

Appendix A

RB8 terminology changes

RB8 has streamlined many RB7 functions, so related functions are all in one process. The terminology has also changed to be more inclusive of all legal support firms, instead of solely court reporting firms. This table provides translations for RB7 users of familiar RB7 terms and functions into their new RB8 terminology.

RB7	RB8
Add/Change Cases	Case Manager
Update Calendar	Calendar Manager
Confirm Calendar	Calendar Manager
Assign Reporters	Assign Resources
Print Worksheets	Notify Resources
Reporter Call-in	Notify Resources
Invoice/Job Search	Invoice Inquiry
Witness Book	Witness Inquiry
Reporter Billing Summary	Pay Resources
Reporter Payable Summary	Pay Resources
Reporter Commission Report	Sales Commission Report
Manual Fix	Override Resource Pay
Attorneys	Contacts
Reporters	Resources
Misc. Charges	Service Items
Companies	Business Units
Universal Search	Query Maker

Appendix B

Frequently Asked Questions

Refer to this section to find RB8 solutions to common business problems, work shortcuts, and step-by-step instructions for valuable RB8 functions that you might not have used yet.

Q. My client just landed a big case. How do I set up an online case repository for the client?

1. Go to **Calendar** > **Case Manager.**
2. Click **Actions,** then choose **New.**
3. Enter the case information, then click **Save.**
4. Click the **Parties** tab, then enter all contacts that should have access to the case repository.
5. Click the **Depository** tab, then upload (and publish) all the files you have for the case.

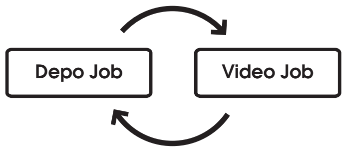
Note: *Clients access these files online through RB Web (sold separately).*

Q. I have work that is going to last for several weeks (or months). How can I set up jobs in the calendar quickly without creating one at a time?

1. Go to **Calendar** > **Case Manager.**
2. Click **Actions**, then choose **New.**
3. Enter the case information, then click **Save.**
4. Click the **Parties** tab, then enter all contacts involved in this case. For each party, enter any services requested (standing orders).
5. Click **Actions,** then choose **Create Jobs.**
6. In the New Job window, enter the job information, then click **Save and Close.**

Q. When do I use linked jobs? How can I create them?

When you have a deposition request that involves video, it is recommended that you create two separate jobs that are linked to each other, like twins. When one of the linked jobs is confirmed, cancelled or rescheduled, you will be alerted to the other job.



1. Go to **Calendar** > **Calendar Manager.**

2. Click **Actions**, then choose **New.**

3. Enter the job information for depo, then click **Save.**

4. Click **Actions,** then choose **Create Linked Job.**

5. In the new job window that opens, change **Job Type** and **Business Unit,** then click **Save and Close.**

Q. The location (or time) has changed for a trial that still has many jobs remaining. How can I change the location (or time) for all of the jobs remaining on the trial without going into each day?

1. Go to **Calendar** > **Calendar Manager.**

2. Using the **Case** and **Job Date (From/To)** search filters, find all of the jobs you need to update. Right-click the first job, then choose **View.**

3. In the window that opens, make any necessary changes, then click **Save.**

4. Click **Actions,** then choose **Mass Update.**

5. In the Mass Update window, select the fields to be updated. In the Job Lists section, click **Actions,** then choose **Check All.**

6. Click **Save and Close** to mass update all of the selected jobs.

Q. The notice I received for a depo request lists attorneys who are scheduled to appear. Where can I enter that information?

1. Go to **Calendar** > **Calendar Manager.**
2. Click **Actions**, then choose **New.**
3. Enter the job information, then click **Save.**
4. Click the **Parties** tab.
5. Click **Actions,** then choose **New** to add each attorney. You do not need to add the scheduling party since RB8 adds it automatically.

Q. I clicked the Parties tab in the job window. With the scheduling party highlighted, I clicked Actions > Prefill Services in the bottom grid. But no service items come up for me to select such as RealTime or Conference Room. What's wrong?

1. Go to **Setup** > **Service Items Master.**
2. Click **Search** to bring up all service items.
3. Right-click a service item you want to make available for clients to select when they are scheduling online using RB Web, then click **View.**
4. Check the **Show on Online Orders (RB Web)** box, then click **Save and Close.**
5. Repeat steps 3 and 4 until you have updated all of the applicable service items.

Q. Whenever I use the Prefill Services feature, either in Calendar Manager or Turn-in, the Preferred Services section always comes up blank. What am I missing?

If a contact has standing orders (preferred services), you can enter them as a part of the contact's profile.

1. Go to **Setup** > **Contacts.**
2. Bring up a contact that has standing orders.
3. Click the **Preferred Services** tab.
4. Check **Actions,** then choose **New** to add each service item.

Q. I received a notice in the mail and scanned it. Where can I archive the file so that it will be automatically attached to the job notification email for the resource?

1. Go to **Calendar** > **Calendar Manager.**
2. Click **Actions**, then choose **New.**
3. Enter the job information, then click **Save.**
4. Click the **Depository** tab.
5. Click **Actions,** then choose **New.**
6. In the Files section, click **Actions,** then choose **Select Files.**
7. In the Open window, locate the folder that contains the notice file. Select the file, then click **Open.**
8. In the **File Type** drop-down, select **Notice.**
9. Click the **Publish** checkbox.
10. Enter a brief description for the file.
11. Click **Save and Close.**
12. RB8 uploads the file to the depository.

Q. I have a case that has several depos scheduled. What is the quickest way to assign the same resource to all of the jobs?

1. After assigning a resource to one job, right-click the job, then choose **Copy Resource Assignments.**
2. In the Copy Resource Assignments window, all unassigned jobs for the case are listed. Click **Actions** > **Check All** to select all of the jobs listed. Or click the **Assign** checkbox next to each job number you want to assign to the same resource.
3. Click **Save and Close.**

Q. Our resources are required to call in once they receive job notifications. How can I keep track of resources' acknowledgements?

1. Go to **Calendar** > **Notify Resources.**
2. Click **Search** to bring up jobs for tomorrow.
3. Right-click the resource who acknowledged a job, then choose **Resource Call-in.**
4. Click the **Acknowledged** checkbox to set the date and time. Click **OK.**

Q. Where can I see all of the resources who are available for tomorrow (or next week)?

1. Go to **Calendar** > **Resource Availability.**
2. In the Search Criteria pane, change the dates **(Date From** and **Date To)** and other filters as needed, then click **Search.**
3. RB8 lists the resources' availability for the specified period. Blue squares represent available time, white squares represent unavailable time, and red squares indicate already-assigned time slots.

Q. We need to monitor resources' backlog everyday so that we do not overlook any rush jobs. Where can I see all of the jobs coming due (to clients) in three days that resources have not turned in yet?

1. Go to **Calendar** > **Jobs in Progress.**
2. In the Search Criteria pane, change the **Due Date,** then click **Search.**
3. RB8 lists the jobs grouped by resource.

Q. I need to make an errata sheet available online to all of the attorneys who were present at the depo. Since not every attorney is ordering transcripts, I can't upload it under the witness where transcripts and exhibits are archived. What can I do?

1. Go to **Calendar** > **Calendar Manager.**
2. Bring up the job you have an errata sheet for.
3. Click the **Depository** tab.
4. Click **Actions,** then choose **New.**
5. In the Files section, click **Actions,** then choose **Select Files.**
6. In the Open window, locate the folder that contains the errata sheet file. Select the file, then click **Open.**
7. In the **File Type** drop-down, select **Errata Sheet.**
8. Click the **Publish** checkbox.
9. Enter a brief description for the file.
10. Click **Save and Close.**
11. Click the **Parties** tab. Check that you've entered all of the attorneys who were present at the depo here.

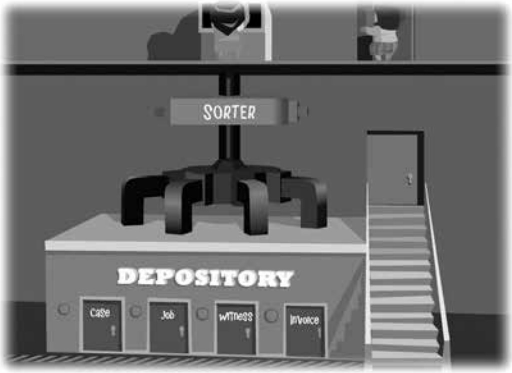
Note: *Attorneys access these files online through RB Web (sold separately).*

Appendix C

RB8 concepts illustrated

RB8 includes some new, efficiency-enhancing functions that are hard to describe in words alone. This section illustrates what these new functions are and why you would want to use them.

You can file documents in your RB8 depository in two ways:



Automatically, in which RB8 sorts your file to its proper storage site.

Or manually, in which you place the file where you want it.

Central depository

You can make your office paperless with RB8's document depository. Instead of filing paper copies of documents, store them electronically in the depository. It's better than paper: No physical storage limitations; and once a document is archived in RB8, you can find and view it instantly.

You can add files to your depository in two ways: **automatically** in different RB8 modules and via RB Web, or **manually** in Production.

RB8 will automatically archive your back-ups of job calendars, production sheets, invoices and various reports in the proper location, so they are always instantly accessible.

It will also store files uploaded by clients or turned in by resources via RB Web for you, so you can easily retrieve them.

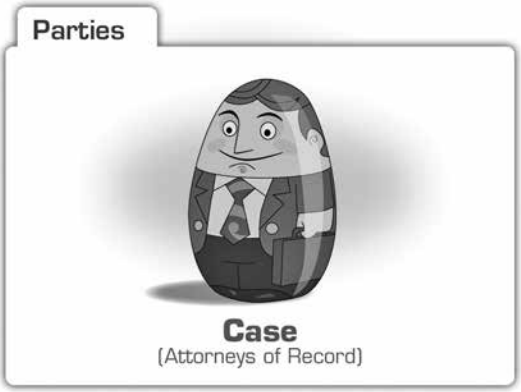
For other files, such as scanned documents, you can store them in the depository yourself. In the Production Depository function, you can manually upload multiple files at a time, while linking the individual files to a case, invoice, job or witness.

You can also publish depository files to RB Web, designating who can have access to them, at the same time you upload them.

By archiving your files in RB8's depository linked to their relevant case, invoice, job or witness, you can always find what you need fast.

For step-by-step instructions on using the RB8 depository, see the RB8 User Guide.

The Prefill concept is similar to Russian nesting dolls, in which a series of dolls are hidden inside each other.



A Case (and its Attorneys of Record) is like the first, biggest doll inside of which the increasing smaller dolls are nestled.

Prefill commands

Prefill is a process in RB8 by which you can quickly add multiple entries to a production order or invoice with a single click. All it requires is some initial set-up.

If you have an on-going case with multiple jobs, you can save yourself a lot of time when scheduling and billing those jobs by setting up the case in RB8 with a list of the parties (attorneys of record) involved. You can also enter the attorneys' requested services.

Then, when scheduling jobs for that case, the parties and their requested services are automatically copied to the job. You can edit this list for each job.

After the job occurs, you can edit the job's list to only include the attorneys who appeared. Such an appearance list is beneficial when you need a record of who came to the deposition, whether they ordered a transcript or not. Even for jobs that are not part of a case, we recommend entering a list of attorneys who appeared for reasons of record and also to speed your production and billing processes.

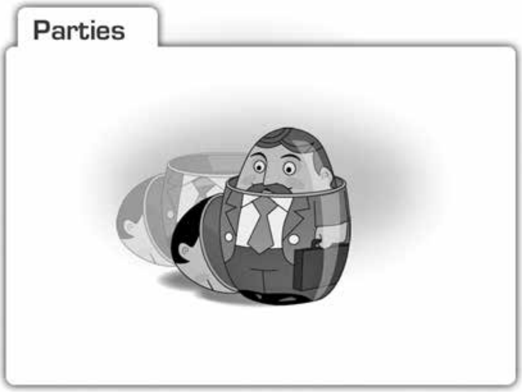
After a "pre-filled" job is turned in, you can streamline your production and billing process with the two Prefill commands: Prefill Parties and Prefill Services.

Prefill parties

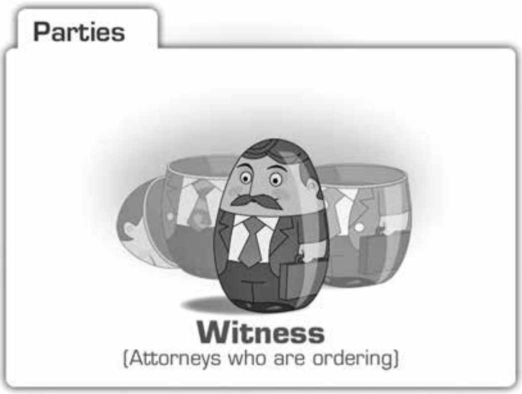
With the Prefill Parties command, you can add all of the ordering parties at once to a job in production by using a list from the case, job or a previous job on the case.

Using an existing list of parties not only saves time here, but can also eliminate the next two steps in the RB8 production process because

The second doll represents a Job inside the case. It includes a subset of the Attorneys of Record for the case. This set would include only those attorneys who appeared.



Continuing to the third and final doll, Witness would be the subgroup of appearance attorneys who ordered copies of the transcript.



by default it copies order and service item information too. For every party entered here, RB8 generates an invoice.

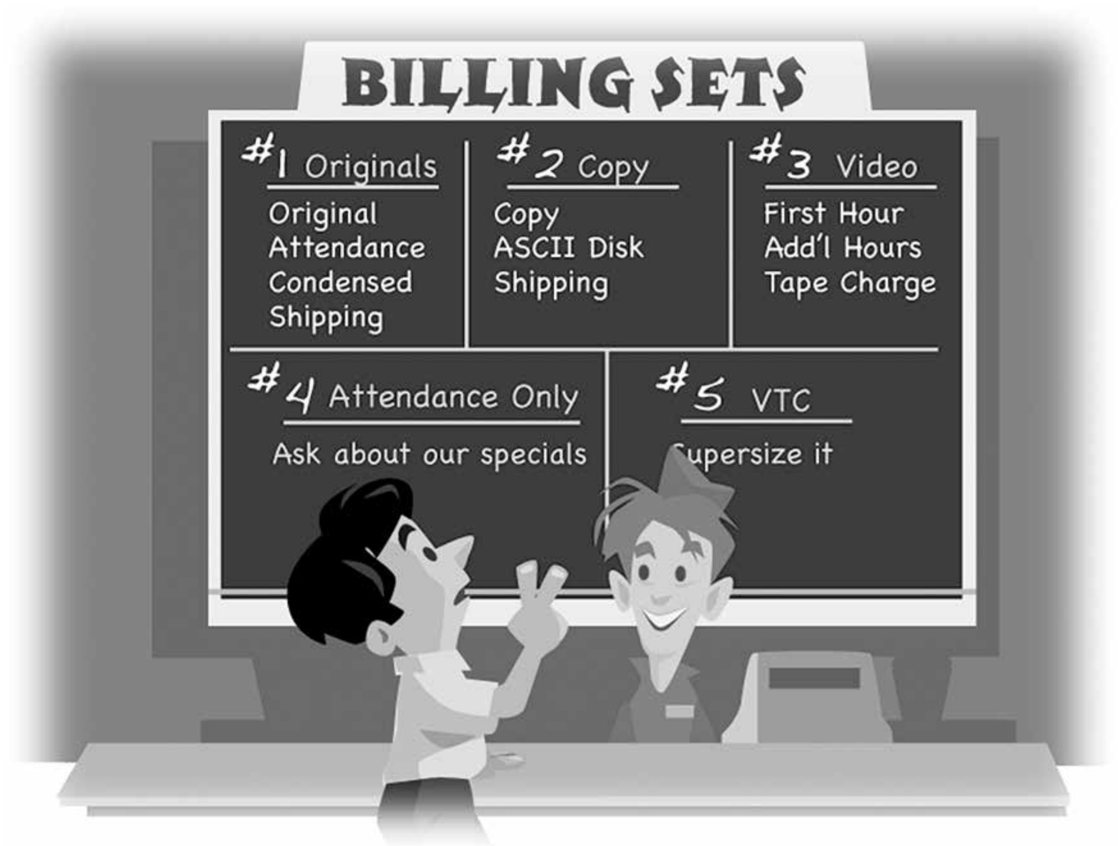
Prefill services

The Prefill Services command works similarly to the Prefill Parties command. If you didn't use Prefill Parties on an order, you can still save yourself some time when selecting services for an ordering party with Prefill Services.

You can pre-fill services from billing sets, which are pre-set groups of service items, or from an ordering party's preferred services: their standing orders for a particular service or services. For more information on billing sets, please refer to page 22.

You create billing sets and clients' standing orders in the Setup module.

For step-by-step instructions on setting up billing sets and standing orders and using Prefill commands, see the RB8 User Guide.



Billing sets

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 you have clients who always order the same group of service items, such as copy orders shipped on ASCII disks, save yourself some production time by setting up a billing set that includes those items. Then, when you get an order from a client for those three service items, you can quickly process the order in RB8 by selecting one billing set instead of three individual items.

Billing sets are not tied to billing rates. They only contain service items, so the same set can be used for different clients, jobs and resources. You apply the actual billing rates when billing the job.

Create billing sets in the Setup module. Then when preparing a job for a client, access your pre-defined billing sets in the Production Turn-in module using the Prefill Services command.

For step-by-step instructions on setting up and using billing sets, see the RB8 User Guide.

Keyboard Shortcuts

Ctrl + M Message Center	Ctrl + P Payments	Ctrl + F Firms
F2 Calendar Manager	Ctrl + D Daily Registers	Ctrl + R Resources
Ctrl + T Turn-in	Ctrl + A Aged A/R	Ctrl + C Copy
Ctrl + B Billing	F3 Pay Resources	Ctrl + X Cut
Ctrl + I Invoice Inquiry	Ctrl + Tab Cycle through open tabbed windows	Ctrl + V Paste
Ctrl + W Witness Inquiry	8	Ctrl + Z Undo