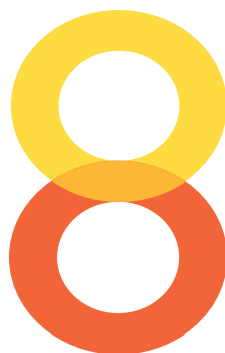


# Guide to What's New in



ReporterBase



**rbweb**

2015 edition

# Guide to What's New in RB8 & RB Web

## 2015 edition

This guide lists all of the RB8 & RB Web updates that were issued in 2015. New features, such as printing shipping labels, are detailed in step-by-step instructions.

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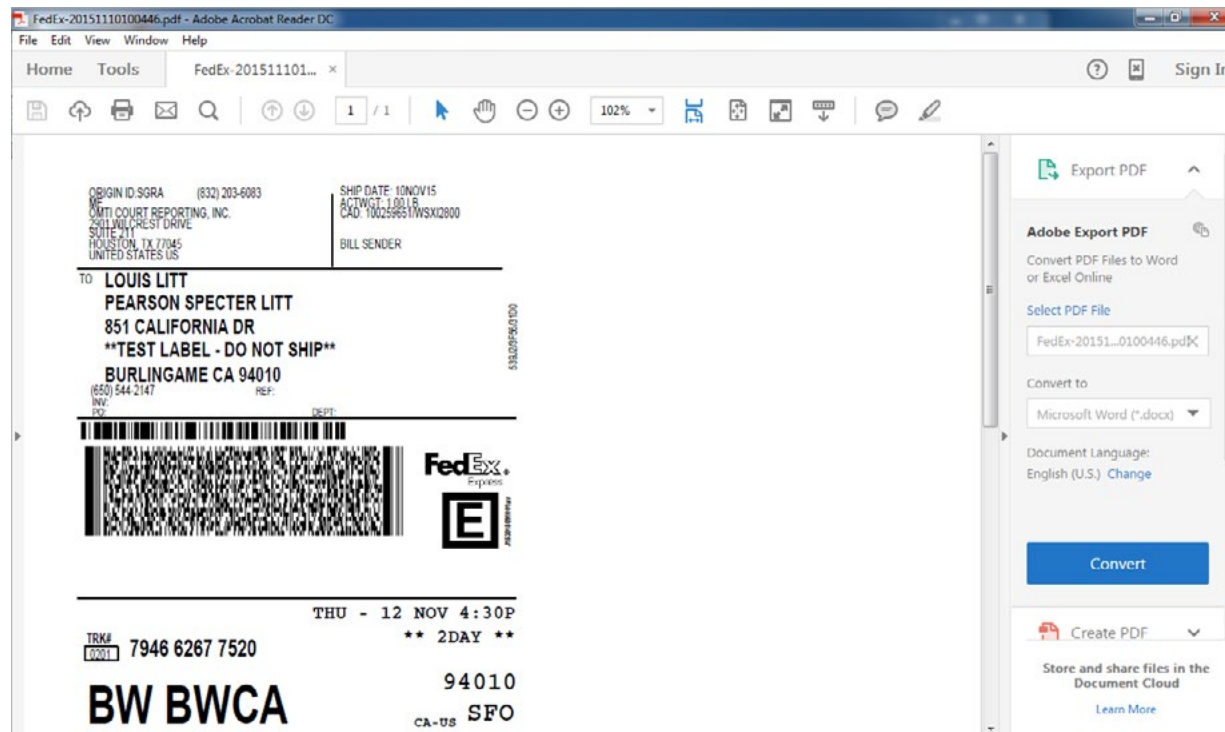
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## RB8 v.8.93.212 updates

Release date: November 3, 2015

### FedEx & UPS shipping labels & tracking within RB8\*

You can now set up and print FedEx and UPS labels within RB8, automatically generating tracking numbers, which you can then follow — all within RB8's Turn-in function.



\*See "[Shipping from RB8](#)" for step-by-step instructions.

### Designate your office as a job location quicker

Instead of adding your offices to the Locations database and then searching for one of them each time a job will be taken at your location, you can select "Our Office" in the **Lookup From** field on the Locations tab of a new job window to bring up a list of only your business units (office locations) to choose from.

### Store important job location directions in RB8

New **Directions** fields in Firm and Resource screens provide a way to record important direction information about these locations, which then automatically appears in the **Location Detail** field of any job that will take place at one of these locations.

### Assigned resources can access witness-level repository

You no longer need to upload exhibits and other files to the job-level or case-level repository if you have resources, such as an editor, who need access to files related to a witness.

### Use every alias pattern at once\*\*

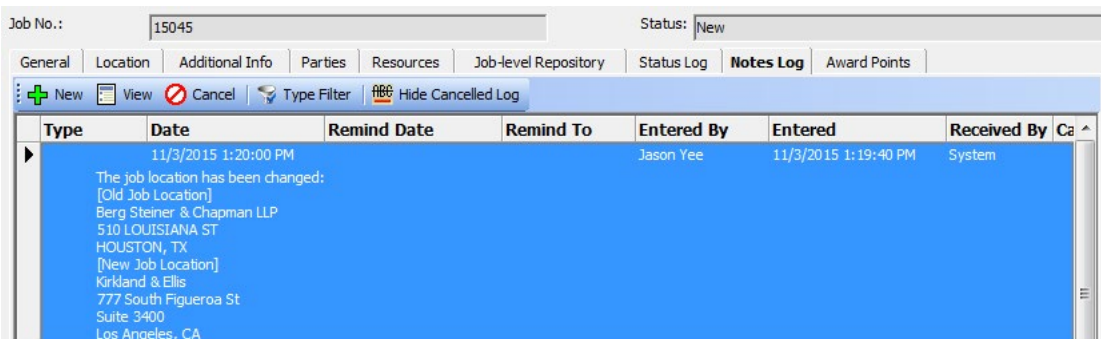
Link exhibits to relevant text in transcripts faster because you no longer have to choose which alias pattern to use in Link Exhibits. RB8 chooses for you from all alias patterns in your system.

\*\*See "[Setting up alias patterns](#)" and "[Linking exhibits](#)" for step-by-step instructions.

## Expanded Notes Log capabilities

New Notes Log capabilities include:

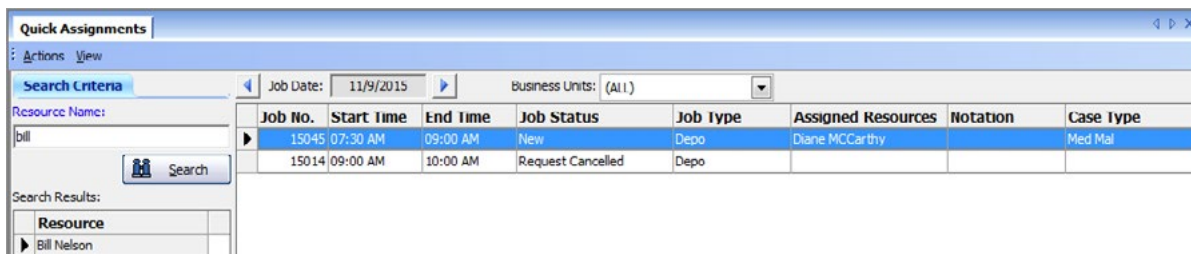
- New Witness-level Notes Log added for tracking information about witnesses.
- RB8 will now create an entry in a job's Notes Log when the location of the job changes.



- Automatic entries about job confirmations, job cancelations and resource worksheets include the email address where the notification was sent.

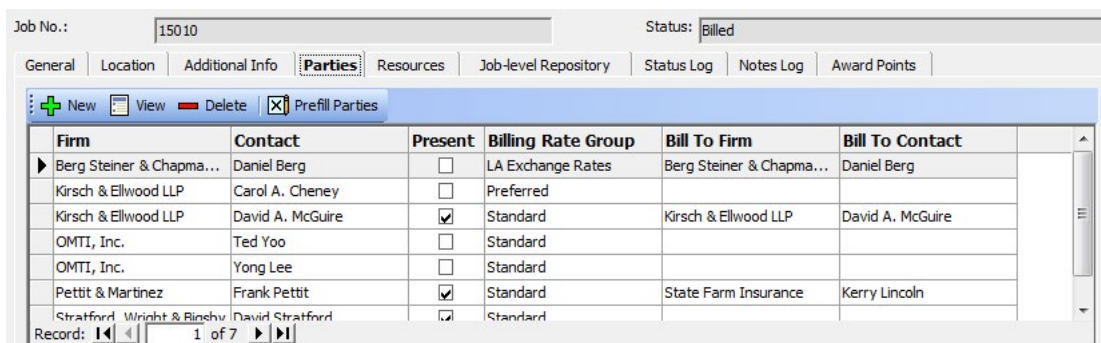
## View relevant information easier when quickly assigning resources

New **Job Type** column on Quick Assignments' grid makes it easy to see what type of resource you need to assign to every job.



## See which attorneys were present at a depo automatically

When a resource turns in a job online or when the Job Party contact is billed, parties' presence will be set to Present automatically. You can also set it or override it manually.



## Better page numbering in condensed transcripts

Condensed transcript pages will now display the actual page number of the page with the beginning and ending page numbers of the transcript pages displayed in parantheses. Example: 5 (8–11).

## Set transcript security on PDF transcripts\*

You can restrict privileges on PDF transcripts, such as banning printing, copying or editing, and password-protect transcripts too when creating transcripts in Turn-in.

\*See "[Setting security in RB-PDF Transcripts](#)" for step-by-step instructions.

## Refer to affiliate's invoice number when paying resource

**Ref. No. for Resource** has been added, which prints on the Resource Payroll and Total Payable Reports. This is handy for resources that bill you, such as affiliates. You can input their invoice number here, so they will know which invoice of theirs you are paying by comparing the number on the Resource Payroll Report with their invoices.

A **Ref No. for Resource** filter has been added to Invoice Inquiry. Ref No. field has been changed to **Ref. No. for Contact** to be used strictly for contacts.

## And more...

- When you change **Lookup From** location type, the corresponding Lookup screen automatically appears.
- You can remove U.S. holidays from business days for job turn-in deadlines.
- You can automatically deny time-off requests that are within a designated number of days before the day requested.
- When a job's status changes, the date and time of the change are now visible in the Calendar Manager's grid in the new **Status Changed** column.

Search Criteria		List View				Weekly View		
Job Date From:	Job Date To:	Job No.	Job Date	Start Time	End Time	Job Status	Status Changed	Cas
<input checked="" type="checkbox"/> 11/ 1 /2015	<input type="checkbox"/>	15046	11/2/2015	09:30 AM	10:30 AM	Billed	11/20/2015 11:36:42 AM	Jam
<input type="checkbox"/>	<input checked="" type="checkbox"/> 12/12/2015	15010	11/4/2015	05:00 AM	06:00 PM	Billed	10/22/2015 4:25:04 PM	Arer
		15020	11/4/2015	08:30 AM	12:00 PM	Turned In	11/18/2015 5:53:04 PM	Big i
		15027	11/4/2015	09:00 AM	10:30 PM	Turned In	10/28/2015 12:54:02 PM	
		15030	11/4/2015	11:00 AM	12:30 PM	Billed	11/17/2015 6:32:31 PM	Frar
		15054	11/4/2015	11:00 AM	03:00 PM	Confirmed	11/3/2015 2:05:14 PM	Jam
		15035	11/4/2015	12:30 PM	03:00 PM	Confirmed	10/29/2015 11:05:26 PM	Jam

- A **State** column has been added on Resource Blast's grid.
- Resource Payroll Report will be sent to new Resource Billing Email address. If resource doesn't have a separate billing email address, the report will be sent to the resource's existing email address.
- Can now search Resources by **Resource No.**
- New **Sales Rep** column on Firms and Contacts' grids lets you easily see which contacts have sales reps and who they are.
- Form Manager no longer allows attaching images over 1MB in file size.
- New **Receive Notifications** tab in **Tools > Web > Site Configurations** combines previous Request Assignment, Turn-in Alert, and Support Alert tabs.
- Clients can enter their email address in the credit card payment area on RB8 invoices and statements.
- Number of Licenses and License Expiration Date have been added to **Help > About.**

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## **RB Web v.8.93 updates**

**Release date: November 3, 2015**

### **Attorneys can request job confirmations online\***

With the click of the new **Request Confirm** button in a job detail screen in RB Web, attorneys can send a request to your office for job confirmation. These job confirmation requests appear in the Message Center of any of your staff designated to receive these alerts, so they can quickly confirm the job and send an automatic confirmation email to the attorney. You can customize the email message in **Tools > Web > Site Configurations** on the **Calendar - Auto Reply** tab.

\*See "[Confirming on-line job requests](#)" for step-by-step instructions.

### **Customize online turn-in**

Add custom fields to the Job and Witness steps in online turn-in. Custom fields can be text, numbers, Yes/No, or date & time. Content entered into custom fields during online turn-in appear on the Billing Sheet.

### **Resources & attorneys can upload multiple files at once**

Resources can upload multiple files at once when turning in jobs online or using the online repository. Attorneys can upload multiple files at once when sending in job requests or viewing existing job requests online.

### **Force periodic password updates**

Increase the security of your RB Web site by requiring users to update their passwords. You set how long passwords last before they must be changed, and whether the user can keep using the same password after it expires or must change it.

### **And more...**

- Changed multiple file download procedure to upload single zip file after compressing the files.
- Attorneys can upload additional files after scheduling a job.
- Attorneys can navigate from comment to comment in Transcript Packages.
- Reporters can specify if Read & Sign is required on a transcript and the deadline for Read & Sign.
- Resources can input a separate email address for billing purposes on their profile.
- Assigned resources can be given access to files in the Witness-level repository.

Turn-in

## Shipping from RB8

When clients call to find out where their order is, you don't have to leave RB8 to check the shipping status. You can keep track of when and via what method you send jobs out, and even print labels and follow up an order's current location if sent via FedEx or UPS. Plus if your billing department does not invoice a job until it has shipped, they will be waiting for you to change a job's status from Turned In to Shipped.

1. In Step 3: Add orders, click an order to select it.
2. In the Order window, click the **Shipping** tab.
3. Click **New**.
4. In the New Shipment window, select a method in the **Delivery Method** drop-down:
  - If you select FedEx or UPS then click **Print Shipping Label**.
  - If you select one of the other methods, skip to step 12.
5. In the Print FedEx/UPS shipping label window, **Ship From** fields default to your preferred business unit, and **Ship To** fields default to the Sold To contact. Select a different business unit in the **BU ID** drop-down if needed. If the package is to be sent to the firm that is being billed, select Bill To in the **Contact Type** drop-down.
6. Enter the package's weight in pounds in **Weight (lb)** (required), and select other options. (Some options will incur extra fees from FedEx/UPS.)

**Print FedEx shipping label**

Ship From	Ship To
BU ID: Hou-DEP	Contact Type: Sold To
BU Name: OMTI Court Reporting, Inc.	Firm: Berg Steiner & Chapman LLP
Address: 2901 Wilcrest Drive	Address: 445 LOUISIANA ST
Suite 211	
City: Houston	City: HOUSTON
State/Zip: TX 77045	State/Zip: TX 77002-1631
Phone No.: 832-203-6083	Contact: Daniel Berg
Contact: Ikbum Kim	Phone No.: 713-842-2601
Email: ikbum@omti.com	Email: ikbum@omti.com
	<input checked="" type="checkbox"/> Validate Address

Package Information	Services
Packaging Type: FedEx Box	Service Type: FedEx 2Day
Dimension (in.): L: [ ] W: [ ] H: [ ]	Pickup/Drop-off: Drop Box
Weight (lb): [ ]	Signature Type: None specified
Declared Value (\$): [ ]	<input type="checkbox"/> Send Shipment Notifications (Email)
<input type="checkbox"/> Include a return label	<input checked="" type="checkbox"/> Receive Shipment Notifications (Email)
Return Service Type: Standard Overnight	<input type="checkbox"/> Saturday Delivery
	<input type="checkbox"/> Saturday Pickup

**References (You can only choose up to 3 references.)**

<input type="checkbox"/> Print Invoice No.	<input type="checkbox"/> Print Job No. in Purchase Order Number section
<input type="checkbox"/> Print Witness in Department Number section	<input type="checkbox"/> Custom Reference: [ ]

**Shipping Label**

Label Image Type: PDF

7. If you want to include RB8 information on the label, such as the invoice number, job number and/or witness name, check the box(es) under **References**. You can also include other information by entering it in the **Custom Reference** field.

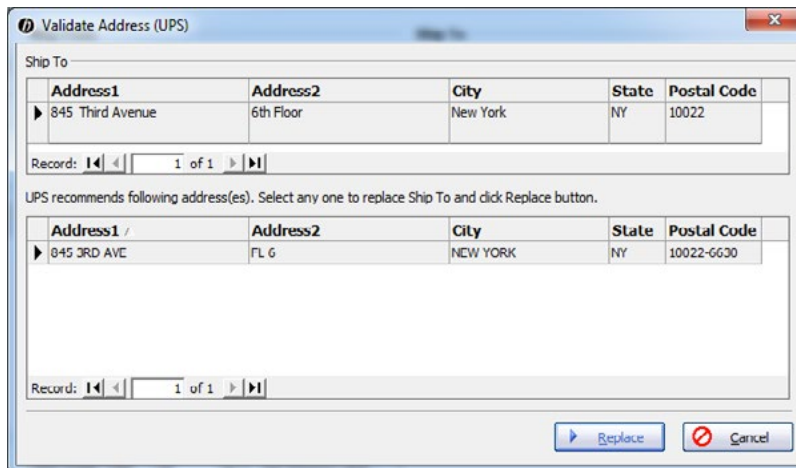
- If you have a special printer that requires a particular type of file, choose the file type in the **Label Image Type** drop-down. Otherwise, leave it as the default file type.



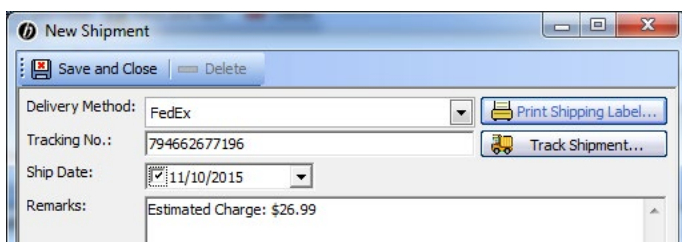
**IMPORTANT**

Before you can print labels and track FedEx or UPS shipments, you must first obtain account information and a key from FedEx/UPS, then enter it in RB8 System Preferences. (See “Adding your FedEx & UPS accounts to RB8.”)

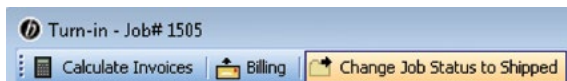
- With the **Validate Address** box checked, click **Get Shipping Label**.
- If the Validate Address window appears, any recommended addresses will appear below the Ship To address originally entered in RB8. To print using:
  - The original address, click **Cancel**.
  - A recommended address, click the desired address, then click **Replace** and click **Yes** in the pop-up window that appears.



- The label appears with the associated program for the file type that you selected in the **Label Image Type** drop-down. Print the label from this screen. Then click the close button on the Print FedEx/UPS label window.
- After the shipping label prints, the **Tracking No.** and **Ship Date** appear in their respective fields in the New Shipment window, and the estimated shipping charge appears here in **Remarks** and on the Order - [contact] window. To track the shipment, click **Track Shipment** here or in the Order - [contact] window.



- Enter details or other comments about the shipment in **Remarks**.
- Click **Save and Close**. Then click **Save and Close** in the Order - [contact] window.
- Repeat with any remaining orders in Step 3: Add orders.
- When finished, click **Change Job Status to Shipped** in the Turn-in window.



**TIP**

To see where a shipment is at any time, click **Track Shipment** in the Order - [contact] window.

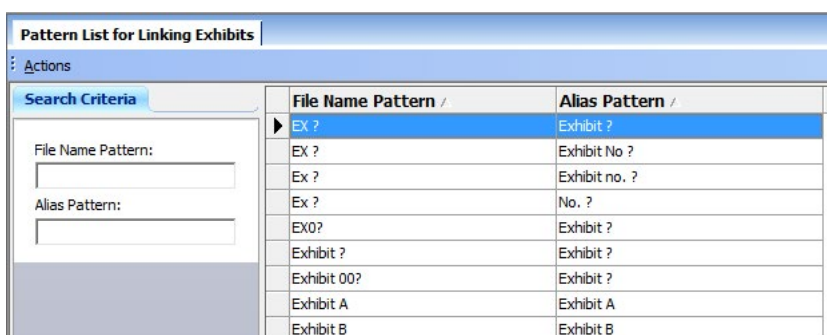


## Setting up alias patterns

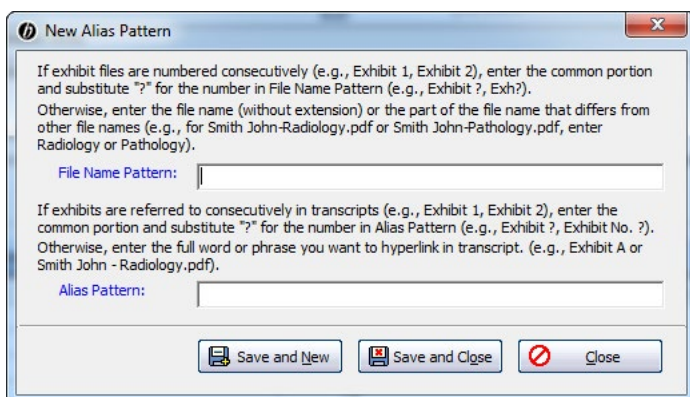
RB8 can automatically add hyperlinks in PDF transcripts to related exhibits, so your clients can view exhibits in context by clicking the links in the transcript. These links are called *aliases*, and can be either words or phrases used in transcripts to reference the exhibits.

If your exhibit file names and exhibit references in transcripts follow a pattern, for example files and references are numbered consecutively (file names like EX01, EX02, and transcript references like Exhibit 1, Exhibit 2), save production time by setting up those patterns in this function before producing hyperlinked transcripts.

1. On the menu bar in RB8, click **Tools > Pattern List for Linking Exhibits**.
2. Any existing patterns appear in the window. Click **Actions > New**.



3. In the New Alias Pattern window, enter the in-common part of exhibit file names, such as EX or EX0, in the **File Name Pattern** field. If exhibits are numbered consecutively, add a “?” (question mark) in the file name pattern indicating where the number appears.



4. In the **Alias Pattern** field, enter the in-common part of the names used in transcripts to refer to exhibits, such as exhibit or Exhibit. If exhibits are numbered consecutively, add a “?” (question mark) in the alias pattern indicating where the number appears.
5. Click **Save and New** if you have more than one pattern to save. Repeat steps 2–5 with any other patterns. Click **Save and Close** when finished.



### NOTES

**To edit an existing pattern:** Double-click the pattern in the Pattern List for Linking Exhibits grid to select it. In the Alias Pattern - [current pattern] window, edit the fields as desired, then click **Save and Close**.

**To delete an existing pattern:** Click the pattern in the Pattern List for Linking Exhibits grid to select it, then click **Action > Delete**. Click **Yes** in the pop-up window that appears.

## Linking exhibits

Instead of delivering a PDF transcript and its related exhibits as separate files, provide your client with a single PDF document with hyperlinked exhibits embedded inside the transcript.

With a single click, your production staff can pull all exhibits related to a transcript automatically from the repository. Then they can easily create exhibit hyperlinks within a PDF transcript. They can also apply the reporter's digital signature and the agency's electronic signature to the transcript at the same time. The finished PDF is then uploaded to the repository.



### TIP

Before using Link Exhibits, set up common file names and *aliases* (the words and phrases used in transcripts to reference the exhibits) as patterns that RB8 can use to automatically link exhibits in **Tools > Pattern List for Linking Exhibits**. (See "Setting up alias patterns.")

1. On the menu bar in RB8, click **Production > Link Exhibits**. Or if you clicked the **Link Exhibits** button in the PDF Transcript window, skip to step 4.
2. In the Search Criteria pane, enter search filters as needed, then click **Search**.
3. RB8 lists all of the PDF transcripts that meet the specified search condition(s). Double-click the transcript (witness) that you want to link exhibits to.
4. In the PDF Transcript - [witness name] window's Options for Link Exhibits, enter a number in the field:
  - **Do not link first [ ] pages** – To prevent exhibit linking in the beginning of the document, such as the cover page.
  - **Do not link last [ ] pages** – To prevent exhibit linking in the end of the document, such as the index.
5. In the **Exhibits** section, click **Add**.
6. In the Add Exhibits window, exhibit files related to this witness appear. Click **Check All** to select all the files at once, or check their individual **Select** box to choose specific files, then click **OK**.

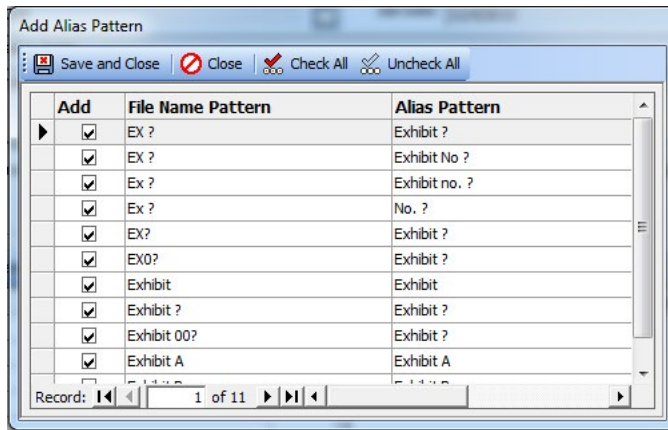
Select	Level	File Name	Description /	Upload Date
<input type="checkbox"/>	Case	Exhibit 4.pdf		11/4/2014 9:48...
<input type="checkbox"/>	Job	Exhibit 3.pdf		11/4/2014 9:48...
<input type="checkbox"/>	Witness	Exhibit 1.pdf		10/28/2014 2:5...
<input type="checkbox"/>	Witness	Exhibit 2.pdf		10/28/2014 2:5...



### IMPORTANT

Only files whose **File Type** was set to Exhibit when uploaded to the repository will appear in the Add Exhibits window. (See "Uploading files.") If you used a different name for this type of file, change the **File Type** name to Exhibit using the **Merge To** function in the Code Manager. See "Removing drop-down values."

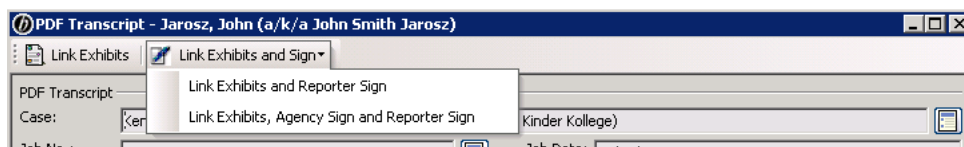
7. After selecting exhibits, they appear listed in a grid. To set aliases, click **Add Alias Pattern**.
8. In the Add Alias Pattern window, all the alias patterns you entered in Pattern List for Linking Exhibits appear (see "Setting up alias patterns"), and all are selected by default. De-select any patterns, if desired, and click **Save and Close**. In the pop-up window that appears, click **OK**.



9. If any file names under **Exhibits** do not match the patterns listed in the **File Name Pattern** under **Aliases**, click **Add** in the **Aliases** section. In the New Alias Pattern window, enter the full common portion of the exhibit file name in the **File Name Pattern** field and enter the full common portion of the text in the transcript that refers to the exhibit in the **Alias Pattern** field. If there are more exhibit file names that do not match the existing patterns, click **Save and New**, and repeat this step. When finished, click **Save and Close**.

10. After entering all of the aliases for the exhibits, click:

- **Link Exhibits** – To automatically link exhibits.
- **Link Exhibits and Sign > Link Exhibits and Reporter Sign** – To apply the reporter’s digital signature to the transcript at the same time as you link exhibits. See “Creating PDF Transcripts.”
- **Link Exhibits and Sign > Link Exhibits, Agency Sign and Reporter Sign** – To apply the agency’s electronic signature and the reporter’s digital signature to the transcript at the same time as you link exhibits. See “Creating PDF Transcripts.”



**NOTE**

When using **Production > Link Exhibits**, if you attempt to link exhibits to a transcript that has already been digitally signed, a pop-up will appear warning you that this is not allowed because it would invalidate the digital certificate.

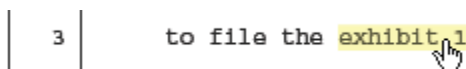
11. When linking is finished, either:

- **The Add Digital Signature window appears** – Navigate to where the signature should appear and click to apply the signature.
- **The PDF Transcript window appears** – The **Link Exhibits** button is now grayed out. You can continue with signing the transcript and saving it to the repository. See “Creating PDF Transcripts.”
- **The New Upload window appears** – Click **Save and Close**. The linked PDF transcript uploads to the repository and is published, so that clients and reporters can access it on your RB Web.



**TIP**

When your clients open the PDF, they can view any exhibit image in its native format by clicking a hyperlinked reference to it in the PDF. They do not have to maintain any additional files or file structure to access the exhibits.



### ***Setting security in RB-PDF Transcripts***

You can restrict privileges on PDF transcripts, such as banning printing, copying or editing, and password-protect transcripts too when creating transcripts in Turn-in.

1. To set security for the transcript, click **Set Security**.
2. In the Set Security window, enter a password in the **Change Permission Password** field, then select which activities you will allow users to perform by unchecking their box(es).
3. If you want to require users to enter a password to open the transcript, enter a different password than the Change Permission Password in the **PDF Transcript Open Password** field.
4. Click **OK**.



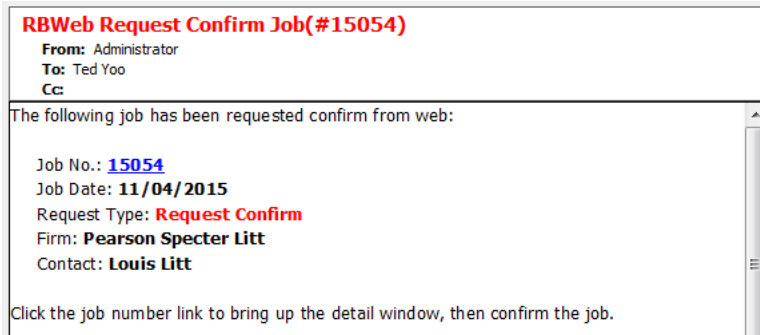
#### **IMPORTANT**

The **Change Permission Password** is for your agency's internal use only. It allows the user to change security permissions in Adobe Acrobat, so it should not be given to clients. Give clients the **PDF Transcript Open Password** to allow them to open the transcript. The two passwords must be different; otherwise, the edited permissions will not save.

## Confirming online job requests

If you have RB Web 8, attorneys can alert your office that they are confirming a job by clicking the Request Confirm button in a job detail screen in RB Web. This saves time because the agency does not have to contact the attorney to confirm that the job is happening. These job confirmation requests appear in the Message Center of any of your staff designated to receive these alerts, so they can manually change the job's status to Confirmed.

1. When you receive a Request Confirm alert in the Message Center, click the job number in the message.

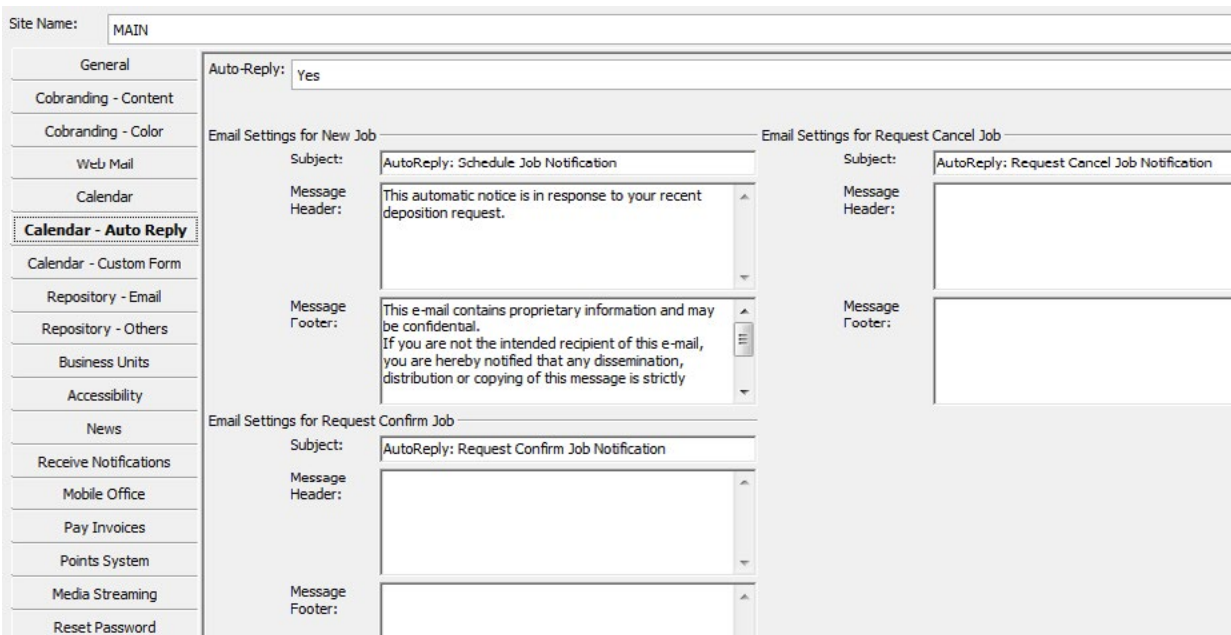


2. In the job detail window, the job status in the **Status** field is Request Confirm. Click **Confirm**.
3. In the Change Job Status window, enter the name of the attorney requesting confirmation and click **OK**.
4. In the job detail window, **Status** changes to Confirmed, and the job's status in the attorney's RB Web calendar changes to Confirmed.



### NOTE

You can customize the email message in **Tools > Web > Site Configurations** on the **Calendar - Auto Reply** tab.



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