RB Digital Signature Proxy Guide

for court reporters

RB Digital Signature Proxy Guide for Reporters

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What is Reporterbase Digital Signature Proxy?

Reporterbase Digital Signature Proxy (RB-DSP) is a system that court reporting agencies use to securely apply reporters' digital signatures, also called digital IDs or certificates, to RB-PDF Transcripts. RB-PDF Transcripts are PDF versions of ACSII transcripts, which have been formatted to include unique features for the legal and legal support industries.

A personal digital certificate allows you to securely authenticate your work to other parties. When your agency applies your Reporterbase (RB) digital certificate to an RB-PDF Transcript, it "seals" the document, meaning if alterations are made afterwards, it will alert anyone reading the transcript that it has been altered from the original. Also when your RB digital certificate is applied to a transcript, ReporterBase.com records that your digital certificate was used, including details such as when, by which agency, for which law firm, and on which transcript.

RB-DSP provides a way for court reporting agencies to efficiently add reporters' digital signatures to finished transcripts in their normal production process without compromising the integrity of the signature. This is achieved by encryption, automating the process, and providing a monitoring function for reporters.

Agencies that you designate as your proxy can apply your digital signature to your transcripts only, and you can monitor their usage of your signature. You can grant digital signature proxies to multiple agencies from your account.

RB digital certificates are free and used for signing RB-PDF Transcripts only. An RB digital certificate is valid for 2 years, and is easy to renew. You will be notified 30 days prior to the expiration date. Then you just have to sign into Reporterbase.com and issue the certificate again.

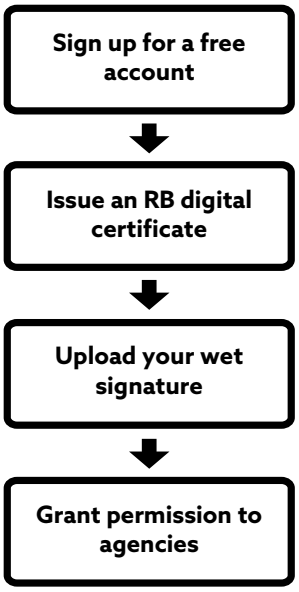
What is Reporterbase.com?

Reporterbase.com is where you register to use RB-DSP and generate your RB digital certificate. It is also where you grant permission for specific agencies to apply your digital signature to transcripts and monitor proxies' use of your digital signature.

This manual provides instructions for obtaining your digital signatures, designating which agencies can act as your proxies, and monitoring the application of your digital signature by your proxies. For more information about RB-DSP, including signature-use monitoring, visit www.reporterbase.com.

RB-DSP registration workflow

To allow court reporting agencies to apply your digital signature to RB-PDF Transcripts, follow these steps:



Follow the link in the invitation email from your agency to sign up at Reporterbase.com for a free account.

Obtain a personal digital certificate for digitally signing your transcripts.

Provide your handwritten signature.

Designate which court reporting agencies can apply your certificate to transcripts, then monitor their usage.

Please note:

RB-DSP works with RB-PDF Transcripts only, not with other electronic transcript formats. RB-PDF Transcripts are PDF versions of ASCII transcripts, which have been formatted to include unique features for the legal and legal support industries, and are only available from agencies which use RB9 office management system.

RB-DSP works with RB digital certificates, which are free. We make no guarantees and provide no support for digital certificates issued by third-party certificate authorities.

Signing up for a free account

If you have been invited by a court reporting agency to use their RB-DSP service, sign up for a free account at Reporterbase.com, set up your free digital signature, and grant the agency digital signature proxy.

1. Click the hyperlinked link in the invitation email from your agency.
2. In the Join Reporterbase.com screen, **Registration Key** is automatically filled in from the email. Enter the rest of your information in every field (required). The password you enter must meet the requirements: Minimum 8 characters, mix of upper and lowercase letters, numbers, and symbols. No more than 2 consecutive letters or numbers, and not include your birth date or name.
3. Click **Terms of Use** to read about your rights and the requirements for using the site, then return to the sign-up screen and check the **Terms of Use** box.
4. Click **Privacy Policy** to read about how we use information on the site and what your privacy rights are, then return to the sign-up screen and check the **Privacy Policy** box.
5. Check the 3rd box if you would like to receive email communications from Reporterbase.com.
6. Click **Request to join.**
7. Check your email for the automatic email from Reporterbase.com with your **Verification Code.**
8. Return to Reporterbase.com within 5 minutes to enter your code in the **Verification Code** field. Then click **Submit.** If you didn't get a code or the deadline passed, click **Resend Code.**
9. If the code you entered is correct, Reporterbase.com opens to the Register Certificate screen. You can now generate a free digital certificate and register your digital signature. See "Registering your certificate."

Signing into Reporterbase.com

Reporterbase.com uses two-factor authentication (2FA) for enhanced security, so each time you sign in you will be issued a verification code to enter before gaining access.

1. On www.reporterbase.com, enter the email address you registered in **Email.**
2. Enter the password you created in **Password.**
3. Click **Log In.** The screen changes from Sign In to Verification Code.
4. Check your email for the verification code and enter it in the field on the screen, then click **Submit.** You have 5 minutes from when you clicked **Log In.** If you didn't get a code or the deadline passed, click **Resend Code.**
5. If the code you entered is correct, the Welcome screen appears. You can access any area of Reporterbase.com from the menu at the top of the screen.

Registering your certificate

Before using Reporterbase Digital Signature Proxy, generate your digital certificate. Then add your "wet" signature — a copy of your handwritten signature.

1. If not already on the Register Certificate screen, click **Register Certificate.** Then click **Issue Certificate.**
2. Enter a password for your certificate, then click **Create Certificate.** (You can use the same password as your LogIn password, if desired.)
3. The Register Certificate screen updates to the Upload signature screen. See "Adding your wet signature."

Adding your wet signature

1. On the Register Certificate > Upload signature screen, create your wet signature. EITHER:
   - Draw your signature inside the box. OR:
   - If you would prefer to sign your name on paper:
     1. Click **Upload Signature.**
     2. Download and print out the Signature Guide Form.
     3. Sign your name in black ink in the solid box on the form. Make sure that your signature does not extend beyond the borders.
     4. Scan or take a picture of the form and save as PNG or JPG format.

5. Crop the image down to your signature without borders and save as PNG or JPG format.
6. Click **Browse,** find your final signature image on your device, then click **Upload.**

2. Click **Submit.** If:

- **You responded to an agency's invitation,** the Grant Permission > New Agency screen automatically opens with the agency that invited you listed, click **Grant.** A popup will appear notifying you that your certificate information has been forwarded to the selected agency. Click **OK.**
- **You were updating your existing wet signature,** the My Certificate screen automatically opens. See "Checking your certificate information."

Updating your digital certificate

When you update your email address or your digital certificate is expired, issue the certificate again.

1. You can reissue your digital certificate or update your wet signature at any time by clicking **Register Certificate.**

2. On the Register Certificate screen, if you want to:
   - **Change your wet signature,** click **Next.** See "Adding your wet signature."
   - **Reissue your certificate,** click **Reissue Certificate.** Enter a password for your certificate, then click **Create Certificate.** If you want to upload a new wet signature, click **Yes** (see "Adding your wet signature"). Otherwise click **No.** The My Certificate screen opens (see "Checking your certificate information").

Permitting agencies to apply your signature

Before an agency can apply your encrypted digital signature to RB-PDF Transcripts, you must grant them permission to use it. You can grant permission to multiple agencies to be your proxy.

After granting permission through Reporterbase.com, each time your digital certificate is used by a registered reporting agency to sign an RB-PDF Transcript, you can be notified via email and monitor their usage of your digital signature. You can also remove an agency's proxy at any time.

1. Click **Grant Permission.**

2. In the Grant Permission screen, any agencies you have already designated as your proxy are listed. To:

- View and manage their proxy, click their hyperlinked **>.**
  1. In the Grant Permission > View Agency screen, verify the agency details. To remove their proxy, click **Deny Permission.**
  2. To reauthorize their proxy, click **Resend Permission.** In the popup that appears, click **OK.**
  3. Click **Back** to return to the Grant Permission screen.
- Give another agency proxy for your digital signature, click **New.**
  1. Enter part of the agency's name in **Agency.**
  2. Select the agency's state in the **State** dropdown.
  3. Click **Search.**
  4. In the results, click the agency's radio button. Then click **Grant.** A popup will appear notifying you that your certificate information has been forwarded to the selected agency. Click **OK.**

Checking your certificate information

View information about your Certificate and Wet Signature, including their current status.

1. Click **My Certificate.**
2. No fields are editable in the My Certificate screen but you can see:
   - **Issuer:** CN (Common Name) is the URL of the Certification Authority which issued your certificate. O (Owner) is the company that issued your certificate. C (Country) and S (State) where your certificate was issued.
   - **Effective Date:** When your certificate was issued.
   - **Expiration Date:** When your certificate expires.
   - **Email:** The email tied to this account.
   - **Wet Signature:** The image of your signature that is applied to RB-PDF Transcripts.
   - **Status:** The current status of your signature proxy, such as "Need to issue a certificate," "Need to upload wet signature," or "Ready to use Digital Signature."

Monitoring agencies' use of your digital signature

Reporterbase.com records every use of your digital signature by your proxies including when it was applied and to which transcript. You can monitor court reporting agencies' use of your digital signature by reviewing these records.

1. Click **Certificate Usage (More > Certificate Usage** on mobile devices).
2. The default view is all the times your signature was applied in the current year, grouped by month/agency. You can see when your signature was applied, the agency who applied it, and how many times they applied it that month. At the bottom of the list is the total uses for the year.
3. To view usage for a different year, click the **<** (previous year) and **>** (next year) surrounding the year in the header.
4. Click a listing's **>** to see a breakdown of that company's uses in that month. The Certificate Usage > [Month] of [Company] screen lists the date your signature was applied to an RB-PDF Transcript, date of the related job, and witness name.
5. Click a job's **>** to see more details including the job number, case, and client.

Updating your preferences and information

Define your preferences, edit your information, and change your password.

1. Click **Account Info (More > Account Info** on mobile devices).
2. You can update your personal information in any field.
3. Under **Preferences,** the default is for Reporterbase.com to email you every time one of your proxies applies your signature to a transcript. If you prefer not to be notified, uncheck the box.
4. Click **Save.** In the popup that appears, click **OK.**

Changing your password

You can change your password at any time.

1. Click **Account Info (More > Account Info** on mobile devices).
2. Click **Change Password.**
3. In the Account Info > Change Password screen, enter a **New Password.** Your new password must meet the requirements: Minimum 8 characters, mix of upper and lowercase letters, numbers, and symbols. No more than 2 consecutive letters or numbers, and not include your birth date or name.

4. Enter the password again in **Confirm Password.**
5. Click **Save.** RB will email you a **Verification Code.**
6. Check your email for the verification code and enter it in the field on the screen, then click **Submit.** If the code you entered is correct, the Welcome screen appears.

Deleting your account

If you no longer want to use RB-DSP, you can delete your account. When you delete your account, all of your personal and historical data are deleted from Reporterbase.com. OMTI will not retain any of this information except as required by law and will not be able to restore your account. Proceed to delete your account only if you are sure you will not need your data stored on Reporterbase.com.

1. To delete your Reporterbase.com account, click **Account Info (More > Account Info** on mobile devices).
2. Click **Delete Account.** In the popup that appears, click **OK.**

Reporting bugs & other issues

If you have a problem or a question for OMTI about Reporterbase.com and RB-DSP, you can open a ticket which will notify OMTI and allow you to track the progress of your solution. If you have a problem or question for your court reporting agency, please contact them directly.

1. Click **Report Issues (More > Report Issues** on mobile devices).
2. On the Report Issues screen, any issues you have reported previously that have not been resolved are listed with their current status.
3. To report a new bug or other problem with the program, click **New.**
4. In the Report Issues > New Issue screen, enter a descriptive title in **Problem/ Issue** *(required)*.
5. In the **Detail** field enter a complete description of the bug/issue you encountered *(required)*.
6. Click **Save.** Your issue appears in the list on the Report Issues screen with the **Status** "Issued."

Following up on reported issues

After you submit a ticket to OMTI, you can discuss the topic with OMTI to resolve the issue through the comment thread on the ticket. When the issue has been resolved or is otherwise no longer an issue, you can close the ticket. You can re-open the ticket later if you want to resume the conversation.

1. Click **Report Issues (More > Report Issues** on mobile devices).
2. On the Report Issues screen, any issues you have reported previously that have not been resolved are listed with their current status.
3. To view a ticket's history and follow up, click its hyperlinked **>.**
4. In the Report Issues > Edit Issue screen, you can view more information about the ticket including the description you entered, any comments entered by the OMTI support team or you, and the last time someone acted on the ticket.
5. To continue the conversation about the issue, enter a comment in the **Comment** field. Then click **Save.**
6. When you are satisfied with the resolution of the issue, enter a final comment and click **Close Issue.** The issue moves from the open issues list on the Report Issues screen to the Report Issues > Closed Issues screen. If you want to re-open the ticket to continue the discussion, see "Viewing re-opening closed tickets."

Viewing & re-opening closed tickets

You can review tickets you closed anytime. And if you want to continue the discussion in a closed ticket, you can re-open the ticket.

1. To view resolved issues, click **View Closed Issues** on the Report Issues screen.
2. On the Report Issues > Closed Issues screen, click the ticket's hyperlinked **>.**
3. In the Report Issues > View Issue screen, you can see the ticket's details including the entire discussion with OMTI. If you want to continue the discussion, click **Reopen Issue.**
4. Enter your new comment in **Comment,** then click **Save.** The ticket's **Status** changes to "Reinstated" and moves back to the open issues list on the Report Issues screen.

Finding answers

Find answers to frequently asked questions (FAQs) about Reporterbase.com and Reporterbase Digital Signature Proxy (RB-DSP). Download the user guide, which contains step-by-step instructions and more about Reporterbase.com and RB-DSP.

If you have an issue with information about your transcripts on Reporterbase.com, please contact the related court reporting agency.

1. To find answers about Reporterbase.com and RB-DSP, click **Help (More > Help** on mobile devices).
2. FAQs are listed on the screen. Click **User Guide** to download the RB Digital Signature Proxy User Guide.

Leaving Reporterbase.com

You are automatically logged out of Reporterbase.com after 60 minutes of inactivity for security reasons. You can also log out immediately at any time.

1. To log out immediately, click **Log Out (More > Log Out** on mobile devices).
2. Click **Yes** in the popup.

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If you require assistance in setting up or managing your digital signature on ReporterBase.com, please contact your court reporting agency. OMTI does not provide direct support to court reporters beyond online help and this manual.

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