Manage & grow your legal support business with RB9

Everything you need to run your office and communicate with clients and reporters

RB9 is the heart of the ReporterBase system that handles the unique business tasks and processes of managing court reporting and other litigation support. RB9 handles your important business tasks, such as billing and scheduling, in a secure, flexible, interconnected environment that includes PDF and interactive mobile transcript creators, text message job notifications, and email job confirmations.

It includes a central repository, so you don't need to keep hard copies of information and you can easily share information with others. Plus it handles shipping, receivables, collections, payables — including direct deposit payroll — and business tracking and forecasting, with a full range of reports from work load to cash flow to profitability.

RB9 includes everything most legal support firms need to manage their business built in. It is a turn-key system, but customizable so you can tailor it to your business and the specific services you offer. You can also add optional services, like RB Connect online offices, to extend your company's offerings and capabilities.

RB9 is web-based. There is nothing to install, and no additional hardware or software to buy and maintain. You can use it on any computer, Mac or PC. You can even use it on mobile devices like tablets. It works anywhere you have internet access.

Because it is remotely hosted on the cloud and includes a file repository and better-than-backup system, it eliminates the need for your own server, repository, back-up system, and IT staff. And automatic updates mean you always have the latest version with no action required on your part.

RB9 is hosted on the Microsoft Azure cloud platform with the best security, safety, and accessibility in the business. And OMTI is SOC 2 Type 2 compliant to give you additional peace of mind.

RB9 is subscription based. You can add or subtract users and optional services on a monthly basis as your needs change — even cancel the system at any time with no further obligation.

Reporterbase
Business Management Systems

Business management systems for legal support businesses

What's inside RB9

RB9 contains all of the functions needed for running legal support businesses. Functions are grouped into modules, so related tasks are easily done together. But the system is flexible enough so that you can use functions as needed in your workflow.

The 11 modules in RB9 are Calendar, Production, Billing, Inquiry, Receivables, Payables, Reports, Tools, Entities, Setup, and Connect.

In addition to the modules, there's also a Help section and a personal section.

The following is a breakdown of all the functions in RB9 plus information about other aspects of RB9.

Calendar functions

Start a job with as little information as ordering client, date, and time. Start a new job by copying an existing job and updating it. Include jobs in cases so they automatically share case parties and information. Use the multiple job wizard to set up multiple related jobs including their shared information at once. Create linked jobs that share information but can be canceled independently of each other. Include complete information about cases and individual jobs, including parties, requirements, location, ordering/scheduling clients, and e-billing information.

Schedule and hold Zoom meetings through RB9. Receive alerts about overdue amounts when scheduling late paying clients.

Search jobs by multiple criteria including job location, scheduling client, and witness. View jobs as a list, weekly, or monthly calendar. Update, confirm, reschedule, and cancel jobs.

Notify clients when requests are received. Send clients their job calendars. Import client job requests from RB Connect. Email clients job confirmations as you set jobs or send a batch at a time.

View job tasks as a list or monthly calendar. Assign, notify, and confirm reporters and other resources to tasks. Assign and notify resources anytime: on the fly, in batches, even after the task is finished. Include worksheets and other files in assignment notifications. Send assignments via email, text, and printout. Send email and text blasts to resources about last-minute jobs. Update, confirm, and cancel tasks or resources only. Schedule conference rooms. Log resources' acknowledgements.

Track and analyze jobs. Audit new and canceled jobs for errors. Analyze jobs by client to see how many jobs they are ordering. Analyze jobs by resource so you can distribute work better. View and update outstanding tasks as they progress. Give resources To-Do lists. Award redeemable points to contacts.

Upload case-, job-, and task-level files to the repository. Maintain log of job milestones and client interactions. Make hard copies of your future calendar. Update and track resource's time off.

Business management systems for legal support businesses

Production functions

Turn in jobs, fulfill client requests, and prepare jobs for billing. Enter information about witnesses, attending parties, firms to bill, and services ordered. Generate invoices. Use billing sets and client preferred services to add multiple service items at once. On jobs with multiple parties ordering the same services, copy services from one party to others.

Generate production sheets to tell staff what service items are needed and how many units to produce.

Create PDF transcripts (including 2- and 4-page/sheet condensed versions) with word lists, word indexes, and hyperlinked exhibits embedded in the transcript. Apply free digital signatures. Create Master Word Lists for multiple jobs on a case. Generate PDF/A transcripts for archival purposes.

Apply your own stamps to transcripts. Automatically number PDF exhibits with stamps that include RB9 job information.

Generate labels, envelopes, and form letters with information from your RB9 database automatically included. Email transcripts to witnesses and attorneys. Apply Read & Sign requirements to transcripts. Attach affidavits and errata sheets. Track original transcript location. Ship out produced service items. Track UPS & FedEx shipments.

Track finished transcripts, exhibits, video, and archived files as they move through your production workflow, so you always know their location and status. Produce tracking reports.

Customize invoice headers and messages. Add explanations about specific charges on individual invoices. Finalize invoices by applying billing rates,

RB9 includes at no extra cost:

PDF Transcript Creator for generating customized PDF transcripts with attachments, and hyperlinked exhibits

Transcript Packages, interactive transcripts designed to work in browsers and on mobile devices

Digital signatures to apply to both types of transcripts

Word processor with set of customizable default forms and mail merge

pay rates, and rush charges, then calculating and posting invoices.

Archive witness-level and all-resources level documents in the repository. Look up and download repository files. Grant clients and resources restricted access to files and invoices online through RB Connect.

Billing functions

Finalize and manage invoices.

Post and email or print invoices in batches, including COD invoices. Export invoices in *LEDES 98B* format for clients who require electronic billing.

Transfer invoices between clients. Manage COD invoices. Archive original invoices in the repository.

Inquiry functions

Instantly locate information about jobs, invoices, clients, resources, witnesses, payments, and transcripts.

Generate a settlement amount for a particular case in seconds, no matter how long the case has been going on. Send clients a PDF of their invoices.

Analyze aspects of your busi-

ness, such as clients' billing activity and resources' billing and pay amounts. Run monthly, yearly, and year-to-date total reports.

Print labels for cards and gifts to send to clients celebrating upcoming birthdays and other anniversaries. Find who your best clients and resources are, and which clients are new or inactive.

Business management systems for legal support businesses

Receivables functions

Send clients payment receipts.

Credit and track client payments. Apply a payment to a single invoice or multiple invoices at once. Apply retainers and payments via checks, PayPal, credit cards, and other options.

Enter credits, discounts, overpayments, and other adjustments. Include credit card processing fees. Balance transactions and post payments.

Enter non-cash transactions, such as credit and debit memos, duplicate payments, refunds, miscellaneous income, voids, and write-offs.

Assess finance charges. Run daily register reports. Print or email monthly journal reports to your accountant. Get an instant snapshot of accounts receivable for any date.

Provide resources with billing reports instead of invoices to see what they can expect to be paid for work they have done.

Send clients monthly statements via email or regular mail. Send statements to individual contacts or send consolidated statements to firms per their instructions.

View monthly client activity reports. View all paid or voided invoices for a set time period.

Find overdue invoices. Send clients detailed collection letters. Monitor collection efforts.

Payables functions

Perform payroll tasks. Audit pay statements. Adjust resource pay on an invoice or generally on payroll (such as a bonus or re-curring repayment of an advance). Adjust sales commissions on individual invoices.

Close payroll and send resources pay statements via email or regular mail. Cut payroll checks, direct deposit paychecks, or export payroll to *QuickBooks* (can also export in Tools module).

Review gross pay amounts and adjust as needed before printing 1099s from RB9. Generate forms and reports pertaining to payroll, including for sales commissions, misc. pay not charged to invoices, and outstanding payables.

Generate sales tax reports.

Reward your best customers with points like airlines and credit cards do, based on the business generated by their calls to you. Monitor, adjust, transfer, and redeem points.

Reports functions

Analyze your business's productivity, profitability and other relevant data.

Get an instant snapshot of your sales and gross profit. Compare the current month-, quarter- and year-to-date totals to the previous period. Get total amounts for any period of time.

View miscellaneous sales charges totals & averages by client.

Generate reports rating clients on original and copy orders.

Produce reports for insurance companies breaking down their invoices by client.

View gross profit by invoice.

View invoices or jobs for a specific time period, broken out by resource, and provide resources with their own copies of these reports.

View how quickly resources turn around jobs on average for a specified period.

Generate reports of all jobs with completed tracking steps within a specified period.

Analyze productivity by item, by step, by manager, or by resource.

Report footers display which search criteria were used to generate the report. Search for specific word(s) in reports.

Business management systems for legal support businesses

Tools functions

Import client and resource information from other sources. Update multiple clients, jobs, resources, and locations at once.

Use tags to organize entities. Send emails or regular mail to all entities tagged the same.

Monitor repository usage by in-house staff as well as by clients and resources via RB Connect as required by general security rules for business applications.

Create forms and letters using customizable templates in a word processor with mail merge that automatically adds your RB9 data.

Modify default label templates and create new ones.

Create templates of boilerplate text to fill the notes fields in cases and jobs.

Search notes globally in RB9.

Perform custom searches of your RB9 database, and create your own reports from the results.

Custom Reports

If you require more complex reports from RB9, we offer custom programming. Visit our website for details.

View emails sent from RB9.

Import RB9 entities, invoices, paychecks, and payment transactions into *QuickBooks,* both desktop and online editions.

Download backup files of your RB9 database.

Entities functions

Maintain a deep database of your clients (firms, contacts, and parent firms, i.e., company headquarters), resources (reporters, scopists, video-graphers, other independent contractors, and non-people entities such as conference rooms), job locations, and business units (your company's revenue centers or parts you want to track separately).

View maps and driving directions to entities' addresses.

View month-to-month financial and job activity for a client or resource in interactive graphs.

Label entities with tags to mark them as part of specific groups, which you can use for different purposes, such as marketing.

Set up RB Connect login credentials for contacts and resources.

Include detailed billing, job, and production information for firms and contacts. Include detailed pay information for resources.

Designate different email addresses to receive specific types of email for a single contact, firm, or resource.

Maintain lists of clients' standing requests, plus task turn-around deadlines.

Designate and monitor senior contacts, such as lead attorneys, who can have access to other contact's activities in RB Connect.

Enter client retainers and view history of their application. Record collection efforts.

Set up resources' individual work schedules for RB9 to use when

suggesting resources for tasks. You can override a resource's availability when scheduling jobs.

Tie clients to resources to give resources commissions on their clients' jobs & right of first refusal on their clients' jobs. (Can also tie cases to resources in Calendar.)

Maintain lists of resources' specialties to help in assigning resources.

Maintain lists of resources' certifications as reference for evaluating resources. Include certification expiration dates and set reminders.

Enter resources' digital signature proxy information for applying their digital IDs to transcripts.

Set preferences for your business units. Upload company logos for invoices and transcripts.

Business management systems for legal support businesses

Setup functions

Setup contains functions for customizing RB9. You can run your business using the setup defaults that RB9 includes. Or edit them, delete or hide any you don't need, and add your own options to tailor RB9 to your work processes. You can update any Setup function at any time.

Customize lists by adding, editing, merging, and deleting list entries. Set the default entry that appears in any field tied to a list.

Set up users, store work-related and personal information about them, and give them user names and passwords to access RB9. Group them according to their access levels and job functions, so they can perform their jobs and receive internal messages.

Customize the default Chart of Accounts to match your general ledger or accounting software.

Set up service items and group related service items so you can locate them quickly in their subgroups when billing, instead of scrolling through a long, undifferentiated list of all miscellaneous service items.

Enter billing, pay, and rush rates for services, including e-billing information.

Set up billing rate groups for different categories of clients, so you don't have to scroll through all of your billing rate tables each time you invoice a client. Set up pay rate groups for resources too.

Group service items into billing sets to speed up billable services selection because you only have to choose the set, not each of the items individually.

Set the year's pay dates and their corresponding cutoff dates for each pay period.

Create your own invoice headers and messages for different circumstances.

Is RB9 missing something?

When RB9 users want a new or improved feature, they use our Idea Collaborator to communicate directly with our development team.

Set up tracking items to match your production workflow, then define the steps each item goes through in your process.

Define preferences for how your RB-PDF transcripts will appear and what options they will include. Create multiple transcript preference profiles to cover different transcript requirements.

If exhibit file names and exhibit references in transcripts follow a pattern, for example they are numbered consecutively, save production time by setting up those patterns before producing hyperlinked transcripts.

Set global preferences for various features in RB9.

Connect functions

Used for providing services through the RB Connect plug-in.

Send invitations to clients & resources to use RB Connect that automatically include their login credentials.

Process and monitor the progress of transcript back orders received through RB Connect.

Allow COD clients to pay for and download transcripts online.

Create transcripts to be viewed in browsers and on mobile devices with hyperlinked exhibits and related files bundled together.

Create indexed files contacts can search for specific words in their RB Connect repositories.

Fulfill online reward point requests.

Manage resources' time-off requests made through Connect.

See who is using your RB Connect and how often.

Manage users' questions and problems and maintain a paper trail of their resolution.

Customize the experience for contacts and resources by setting function preferences.

Business management systems for legal support businesses

Help section

Look up information in the online user guide or download it as a PDF. Also get contextual help throughout the program by clicking the Help button on any screen.

Look up current version of RB9 and what changed in each previous version.

View online training videos.

Get support via email, remote support, and live chat with OMTI Support.

Access the Idea Collaborator in our customer portal to submit submit suggestions for improving RB9.

Optional plug-ins

Extend your RB9 services and capabilities with plug-ins.

RB Connect

Give clients and resources secure online access to their schedules, job locations, transcripts and other case files, billing information, and support.

Clients can also view, search, highlight, and comment on interactive transcripts designed to work in browsers and on smartphones and tablets. They can view streaming video, and export their transcripts in various formats including condensed.

Clients can also schedule jobs; backorder transcripts; pay invoices; download files including transcripts, exhibits, and invoices; and view, transfer, and redeem award points.

COD clients can pay online, then download transcripts instantly.

Resources can acknowledge jobs; check their To-Do list; turn in jobs; download pay statements;

compile master word lists; and view their work schedule and request time off.

Optional plug-ins for RB Connect:

- **RB Connect Mobile,** which adds native mobile access so users don't have to pinch and zoom your RB Connect site on their smart phones and other mobile devices.

- **Repository Full Text Search,** which allows clients to search for specific text across files in their repositories.

For more information about RB Connect and its plug-ins, visit our website.

Data Reader

Add this plug-in to use your RB data in your own custom reports or other applications.

For more information on Data Reader, visit our website.

Personal section

Receive automatic notifications from the system, and send and receive messages from other RB9 users in a format similar to an internal email system.

Change your password at any time. Can also change it at log-in if you forget your password.

Release a lock on data in RB9 to switch access from the current user to yourself.

Update user preferences, including overriding some global system preferences for your account only. Designate which functions you want to open automatically on startup. Set your screen to light text on dark background.

Clear your window by closing all tabs at once. Log out of the program.

Turn-key system for legal support firms

RB9 comes with built-in defaults so you don't have to start from scratch defining common items.

They incorporate business logic and best practices for legal support firms derived from 35+ years of developing software for this industry.

You can add, delete, or edit defaults, such as services offered, to customize RB9 to your unique business needs.

Business management systems for legal support businesses

Benefits of RB9

RB9 is the most comprehensive management system for your business. It is also the most convenient — taking care of the technical side of running your legal support business.

Nothing to install

Because RB9 resides in the cloud and you access it through a browser, you do not have to install anything on your computer. RB9 is also platform independent, so you can use it on a Mac or PC, even a tablet.

Never buy a server

In-house servers should be replaced every 3–5 years, as they lose their ability to adapt to increasing workloads. But by subscribing to RB9, your RB Server resides on Microsoft Azure's Cloud Services, so you don't have to buy your own server or maintain up-to-date server software.

Fewer third-party apps

In addition to not needing server software or its related third-party applications, you also do not need transcript production software — RB9 includes a PDF transcript creator and an interactive transcript bundle creator — or a word processor — RB9 has a full-featured forms function with a default set of forms and mail merge.

Repository included

RB9 includes a central file repository, so you no longer have to keep hard copies of important information; and if you add the optional RB Connect plug-in, your clients can access their transcripts and case files online, even pay online (meaning fewer deadbeat clients).

All repository files are stored in the cloud with your RB data with the same security and reliability. Your RB9 subscription includes 100GB of repository storage. Storage capacity increases as needed, automatically. You can monitor your repository usage in RB9 and delete files to save on storage fees.

No backup needed

Data is duplicated on multiple servers in real time. If the active server should go down, another server takes over with no loss of data. This is better than a backup system which only saves data up to a certain time, so anything entered since the last backup is lost. Microsoft Azure's AlwaysOn Availability also eliminates the downtime involved in restoring data from the backup. (For peace of mind, RB9 includes a manual backup download function.)

Repository files are equally secure. Copies of each file are stored on different servers. Azure Locally Redundant Storage replicates each file three times to prevent file loss.

No re-keying

Information entered anywhere in the system — whether by a client requesting a depo through RB Connect or RB Connect Mobile, a reporter turning in a job online, or your staff entering client information in RB9 — automatically flows to where it's needed. This saves time and reduces errors. You can also import client and resource information from other apps.

Better security

Instead of dealing with ever changing security risks and requirements, put your data in RB9 on Microsoft Azure's Cloud Services, which offers enterprise-grade SLAs on services, 24/7 tech support, and round-the-clock service health monitoring. Microsoft knows that many companies are wary of working from the cloud, so they made the commitment and are a leader in cloud security and data privacy.

And OMTI is SOC 2 Type 2 compliant, which provides independent confirmation of our secure processes.

The RB9 program also provides security with protections that include user ID and password login, 2FA login, restricted user access controls for all functions, uneditable notes logs, encrypted personal information, and required information fields.

Business management systems for legal support businesses

More RB9 benefits

Less downtime

Server crashes are a serious cause of downtime, which translates to lost productivity and possibly lost business. RB9 removes that threat by putting RB Server on Azure's Cloud Services. Microsoft guarantees 99.95% uptime on Azure. It also eliminates the wait for IT to resolve things.

Another downtime cause can be network connection problems for remote users trying to log into your in-house network. RB9 solves this problem because it's just an internet connection, not a connection to an in-house network.

Support included

With RB9, you get unlimited support via phone, fax, email, live chat, website, and remote during our regular business hours, plus automatic updates & upgrades of RB9, free listing in the RB XChange job exchange, and other valuable services. Support is included free in your subscription.

Minimal financial commitment

There are no long-term obligations to using RB9, only a monthly subscription that you can add or subtract user licenses and plug-ins from at any time — or cancel at any time with no

on-going financial obligation. The same set-up applies to the included file repository: the first 100GB of storage are included in the monthly subscription, and storage capacity can be added or subtracted as needed.

Next version of RB included

With RB9, instead of having to come up with a large lump sum at once to upgrade when a new version comes out, it is included in your monthly subscription. You always have the latest version automatically, whether it's a minor update or a major upgrade.

System grows to fit any size office

The basic RB9 system includes the RB server software and

database, and Named User Licenses, which allow users to access your RB server through a browser. You need as many Named User Licenses as you will have RB9 users. Named User Licenses can be added or subtracted at any time as your needs change.

And...

Direct deposit payroll saves your resources and your business the hassle of paper checks.

Print FedEx and UPS labels, then track shipments inside RB9.

Automatic text messages and email communications from within RB9 save time.

Named User Licenses

RB9 users sign in through their browser using their own user ID and password. Each user must have their own user license to have their own unique user ID and password.

Because RB9 is a browser-based application, you connect to RB9 through a web server first; RB9 send you information; then it disconnects. It does not track the number of concurrent connections; it can only track individual users' right to access the program.

This means each license is tied to a user ID and password — just like other applications or services on the web: If you subscribe to/are a member of, you have your own user ID and password to access these online applications and services.

Business management systems for legal support businesses

Basic RB9 office management package includes:

- **RB Server**, contains your RB database of clients, resources, jobs, etc.* We install and maintain your RB Server in the cloud on Microsoft Azure's Cloud Services.

- **One (1) Named User License,** for accessing your database on the server through a browser. Additional user licenses are available on a month-to-month basis.

- **Support,** via phone, live chat, email, fax, remote, and website. Visit our website for the latest complete list of support benefits.

* If your company wants to maintain separate databases for parts of your business, e.g., if you operate several agencies and want to maintain separate databases for each, each database requires a separate RB Server license.

Subscribe to RB9

RB9 is available by subscription only. Add or cancel user licenses and plug-ins as needed, and cancel the whole system at any time without further obligation.

RB9 is backed by an unconditional, 30-day, money-back guarantee, so you can try it risk-free.

For more information about subscribing to RB9, visit our website.

Ready for RB9?

All you need to run RB9 is a desktop computer, laptop, or tablet connected to the Internet through a browser. You do not need a server, file storage, backup system, or other software.

We recommend using a device with the most RAM and fastest CPU you can for best performance.

RB9 is optimized to work in all of the common browsers.

Want to try RB9 yourself?

If you are interested in trying out RB9 before making a commitment, we have an RB9 demo site you can explore.

To access the site, contact OMTI Sales to request a user account.

Want to learn more?

Visit omti.com for more information and to sign up for weekly email lessons that cover all of RB9, one function at a time.

Want something simplier?

Check out RB Lite, which includes only essential RB functions for scheduling and billing at a lower monthly cost. Visit omti.com for more information.

Related products

RB Connect online offices plug-in to RB9

RB Connect Mobile optimizes your RB Connect for smart phones & other mobile devices

Data Reader uses your RB data in your own custom reports or other applications.

Repository Full-Text Search creates searchable files in RB Connect/RB Connect Mobile

Omti

Office Management Technologies Inc.

1440 N. Harbor Blvd., Suite 108, Fullerton, CA 92835

omti.com | info4@omti.com

650-396-2105 | fax: 650-560-6550 | Product inquiries: 650-396-2105, ext. 3