



# **RB Digital Signature Proxy Guide** for agencies

## RB Digital Signature Proxy overview

RB Digital Signature Proxy (RB-DSP) is a system that court reporting agencies use to apply reporters' digital signatures, AKA personal digital certificates, to RB-PDF Transcripts, a type of electronic transcript. RB-DSP also provides a way for reporters and agencies to monitor the use of reporters' signatures. Both reporters and agencies must register with ReporterBase.com, and reporters must also issue their personal digital signatures on ReporterBase.com and upload their "wet" signatures to ReporterBase.com.

This manual provides instructions for agencies to register with ReporterBase.com and set up their account to digitally sign PDF transcripts created in RB8 or RB9. For instructions for reporters, download the RB Digital Signature Proxy Guide for Reporters from omti.com.

For more information about RB-DSP, including signature-use monitoring, visit [www.reporterbase.com](http://www.reporterbase.com).

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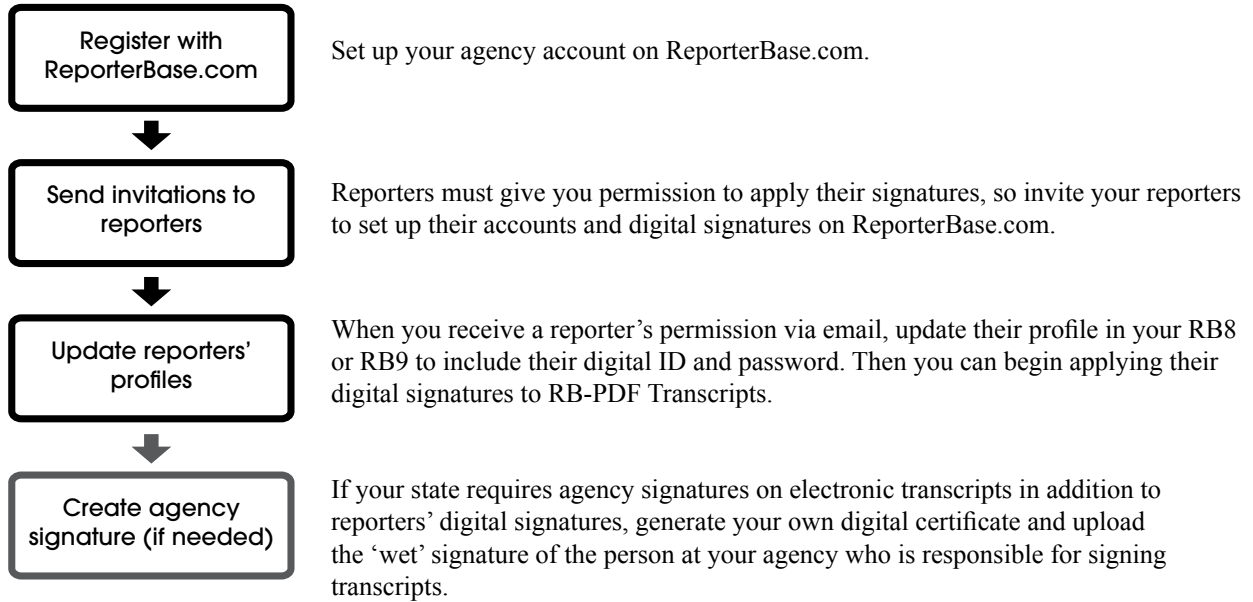
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## **RB-DSP registration workflow**

To set up for your production staff to apply reporters' digital signatures to RB-PDF transcripts, follow these three steps:



### **NOTE**

RB-DSP works with RB-PDF Transcripts only, not with other electronic transcript formats. RB-PDF Transcripts are PDF versions of ACSII transcripts, which have been formatted to include unique features for the legal and legal support industries, and can only be created with RB8 and RB9 office management software.

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## Registering with ReporterBase.com

Incorporate reporters' digital signatures into your production workflow easily and securely. You must be registered to use RB-DSP.

1. Launch your web browser and go to [www.reporterbase.com](http://www.reporterbase.com).
2. In the Agency Log-in section, click **Sign up free**.
3. In the Join ReporterBase.com window, follow the instructions to find your RB8 or RB9 product code, then enter it in the **Product Code** field and click **Validate Product**.

Product Code:     
If you don't know your product code, contact [OMTI, Inc.](#)

4. Once the product code is validated, additional fields appear below. Fill in every field. Check the boxes to agree to the terms of use and privacy policy after reading them. Click **Request to join**.

I have read and agree to the [Terms of Use](#).

Yes, I would like to receive email communications relating to ReporterBase.com. I agree that OM have provided in accordance with the [Privacy Policy](#).

5. An email containing the authorization code will be sent to the email address you have provided. Copy the authorization code from the email, then paste into the **Authorization Code** field in the Authorization window in ReporterBase.com. The Authorization window will only be active for 20 minutes from the time you clicked **Request to join**. Click **Join** to proceed.

The Authorization Code field will only be active for 20 minutes after you clicked **Request to join** in the previous page.

Authorization Code:

Remaining Time: 19:37

6. The Send Invitation window appears. See “Sending invitations to reporters” for more information.

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## Sending invitations to reporters

Before you can apply reporters' digital signatures to RB-PDF Transcripts, reporters must grant you permission to use their digital signatures. Invite reporters to share their signatures with you.

1. Click **Send Invitations** in the navigation bar.
2. In the Send Invitation window, enter the following information:
  - **Send To** – Enter the email addresses of your invitees, separated by commas.
  - **Subject** – Enter text that will appear in the Subject line of the email.
  - **Message** – The default message is provided by OMTI. Change if necessary.

### Send Invitation

Send To:

(Enter the email addresses of your invitees, separated by commas.)

Subject:

Message: 

We are adding a new service that affixes digital signatures to PDF transcripts automatically, securely and without our needing to know your personal information, such as user IDs and passwords.

In a nutshell, this service allows you to designate us as your signature proxy on your transcripts. It controls access to your signature, allowing us to apply your signature to your turned-in transcripts only. It also provides you with a way to monitor the use of your signature and be notified whenever we affix your signature to a transcript.

To implement this service, we need your cooperation. Please click [this](https://www.reporterbase.com/Reporter/RP_RegisterForm.asp) link and register with ReporterBase.com. On this site you will find complete details about the service and instructions for registering your digital signature with them.

3. Click **Send**.
4. Repeat steps 2 and 3 for any additional reporters who work with you.



#### TIP

To see all of the invitations you have sent so far to reporters, click **Invitation Log** in the navigation bar.



#### NOTE

Some ISPs view the sending of one email to multiple addressees as spam and will block them. Different ISPs have different limits on what will cause an email to be rejected. If you work with a large number of reporters, you can send one email to several recipients at once (by entering their email addresses separated by commas, in the Send To field) but break the group into several batches so you are not sending more than 20 emails at a time.

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## Updating reporters' profiles

When you receive an email from a reporter giving you permission to apply their digital signature to RB-PDF Transcripts, copy the (encrypted) information from the email to the reporter's profile in RB8 or RB9. This information will allow RB to automatically access and apply both the reporter's digital certificate and an image of their handwritten signature to RB-PDF transcripts for which the reporter is the reporter of record.



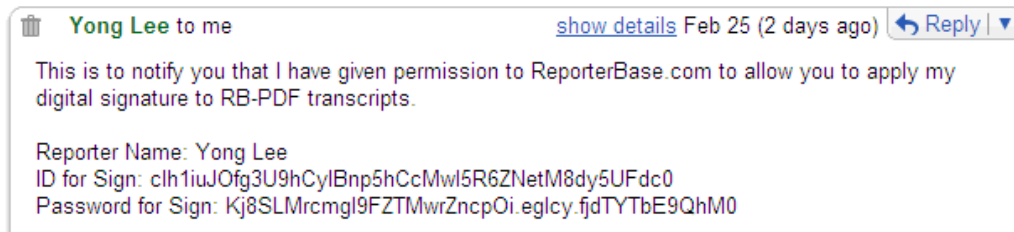
### NOTE

When instructions for RB9 and RB8 differ, the instructions for RB9 appear first in the step. RB8 instructions appear after the slash (/).

1. In RB9, click **Entities > Resources**. / In RB8, click **Setup > Resources**.
2. Search for the reporter. (Refer to the RB9 or RB8 User Guide for search instructions.)
2. Click the reporter's hyperlinked name. / Right-click on the reporter, then choose **View**.
3. Click **Edit**, then scroll or jump to the **Additional** pane. / Click the **Additional** tab. Click the + (plus) button next to **ID for Signing**.
4. Copy the encrypted text strings from the email to the corresponding fields.

### ReporterBase Digital Signature Proxy permission notification

Trash | X



5. Click **Save**. / Click **OK**. Then click **Save and Close**.



### NOTES

Once you have set up your ReporterBase Digital Signature Proxy, applying a reporter's signature is simple: Production staff do not need to go to a third-party website or application; it is all within RB's PDF Transcript function. It is also accurate because production staff do not choose a reporter's signature for a transcript; the correct signature is already tied to the transcript based on who turned in the job.

Applying an agency's signature is a similar process and is required in some states. To set up your agency's signature, see "Creating the agency's electronic signature."

For instructions on creating RB-PDF Transcripts and applying digital signatures, see "Creating PDF transcripts" in the RB8 or RB9 User Guide.

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## Creating the agency's electronic signature

Some courts, such as Arizona's supreme court, require agencies to electronically sign transcripts, in addition to having the reporter's signature on the transcript. Whomever your agency has assigned this responsibility can add their signature to RB's Digital Signature Proxy Service for their agency to automatically apply to RB-PDF Transcripts.

1. Sign in to <https://www.reporterbase.com> in the Agency Log-in fields.

The screenshot shows the Reporterbase.com website interface. At the top left is the Reporterbase.com logo. Below it are two main login sections: 'Reporter Log-in' and 'Agency Log-in'. The 'Reporter Log-in' section has fields for 'Email address' and 'Password', with a 'Log In' button and links for 'Lost your password? Get help here.' and 'Not a member? Sign up free now.'. The 'Agency Log-in' section has similar fields, with the email address pre-filled as 'rebecca@eaglereporting' and the password field masked with dots. It also has a 'Log In' button and the same help and sign-up links. To the right of these sections is a 'Please note' box with text explaining the service is free and providing contact information for help. Below the login sections are three navigation tabs: 'My Reporterbase', 'Agency ReporterBase', and 'About Us'. At the bottom of the page is a section for 'RB Digital Signature Proxy' with text explaining the service for court reporters and agencies, and a note that users must be registered to use the proxy. The footer contains the copyright notice 'Copyright © 2014 OMTI, Inc.' and the OMTI logo.

2. Under Signature Proxy, click **My Signature**.
3. On the Signature Proxy > My Signature screen, click the hyperlink to print out the Signature Form.
4. Sign your name in black ink in the solid box on the Signature Form. Make sure your signature does not extend beyond the borders.
5. Scan your signed Signature Form and save it in PDF format.
6. To submit your completed Signature Form PDF, click **Choose File** next to the **Scanned PDF** field and choose the PDF from your files.
7. We will notify you via email when we have processed your agency signature.
8. To apply the agency signature to RB-PDF Transcripts, see “Creating PDF transcripts” in the RB8 or RB9 User Guide.