



# Manage your legal support business with RB Lite

## RB Lite works for:

**Court reporting agencies**

**Interpreting firms**

**Legal video companies**

**& other legal support businesses**

## Essential functions needed to run your office

RB Lite is the simpler version of RB9, the ReporterBase system that handles the unique tasks and processes of managing court reporting and other litigation support businesses. Like RB9, RB Lite handles your important business tasks, such as billing and scheduling, in a flexible, interconnected environment that includes text message job notifications and email job confirmations.

The difference is the RB Lite includes only the essential functions most legal support firms need to manage their business. It doesn't include features like transcript creators or word processing, or the full range of business reports RB9 has. It also doesn't have the ability to add functionality with plug-ins. So you won't be able to offer online repositories to your clients or online turn-in to reporters.

It does include a central repository, so you don't have to keep hard copies of information. Plus it handles receivables, collections, payables, and basic business tracking and forecasting.

RB Lite 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 in 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.

RB Lite is subscription based. You can add or subtract users as your needs change — even cancel the system at any time with no further obligation. And if you ever want more, you can upgrade to RB9 and use the entire comprehensive system.

Simpler version of



**Reporterbase  
Business  
Management  
System**



### Basic RB concepts

**Contacts:** People who work for firms you do business with

**Resources:** People or things that provide your business with a service, such as reporters, other agencies, or a conference room

**Tasks:** Services requested with a job, such as reporting, interpreting, or video

## What's inside RB Lite

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

The modules in RB Lite are

Calendar, Production, Billing, Inquiry, Receivables, Payables, Tools, Entities, and Setup.

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

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

## 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, and ordering/scheduling clients.

Schedule and hold Zoom meetings through RB Lite.

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 or monthly calendar.

Update, confirm, reschedule, and cancel jobs.

Notify clients when requests are received. Email clients job confirmations as you set jobs or send a batch at a time.

Assign, notify, and confirm reporters and other resources to job tasks. Assign resources to job tasks before or after job confirmations. Send assignments via email, text, or printout. Include worksheets and other files in assignment notifications.

Update, confirm, and cancel tasks. Schedule conference rooms. Log resources' acknowledgements.

Track and analyze jobs. Audit new and canceled jobs for errors. View and update outstanding tasks as

### Functions in all modules:

Export or print lists of search results.

Use dedicated repositories to store files.

Maintain a paper trail of client communications and other actions in notes logs.

Email from within RB Lite.

Customize results grids to your personal preference.

Access help in the contextual user guide on all screens.

they progress. Give resources To-Do lists.

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.



## 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.

Email transcripts to witnesses and attorneys. Apply Read & Sign requirements to transcripts. Attach affidavits and errata sheets. Track original transcript location.

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

Archive witness-level documents in the repository. Look up and download repository files.

## Billing functions

Finalize and manage invoices.

Post and email or print invoices in batches, including COD invoices.

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

### **RB Lite pricing starts at:**

**\$150/month**

**with support and  
100GB of repository storage  
included**

**Additional user licenses:  
\$40 per user**

## 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 business, such as clients' billing activity and resources' billing and pay amounts.

## Receivables functions

Credit and track client payments. Apply a payment to 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. Find overdue invoices, and get an instant snapshot of accounts receivable for any date.

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

## Ready for RB Lite?

All you need to run RB Lite 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.



## Payables functions

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

Close payroll and send resources pay statements via email or regular mail.

Generate outstanding payables reports.

## Tools functions

Import existing client and resource information from other applications. Quickly update multiple clients, jobs, resources, and locations at the same time.

Create forms using customizable templates that will automatically include your RB data.

### Basic system for legal support firms

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

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

RB started as scheduling and billing software for a court reporting agency, and even though it has expanded over the years, calendar, production, and billing are still the most important functions in our programs.

You can customize RB Lite to your unique business needs, including adding to, deleting from, or editing defaults, such as services offered and the contents of automated emails sent by the system.

## Entities functions

Maintain a deep database of your clients (firms, contacts, and parent firms, i.e., company headquarters), resources (reporters, scopists, videographers, 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 firm, contact, or resource in interactive graphs.

Label entities with tags (keywords or phrases) to mark them as part of specific groups.

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.

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

Set up resources' individual work schedules for RB Lite to use when suggesting resources for tasks. You can override a resource's availability when scheduling a job.

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.

Set preferences for your business units. Upload company logo for invoices.



## Setup functions

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

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.

Set global preferences for various features in RB Lite.

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## Personal section

Receive automatic notifications from the system, and exchange messages with other RB Lite users in your company 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 RB Lite to switch access from the current user to yourself.

Update user preferences, including overriding some global system preferences for your account only. Set your screen to light text on dark background.

Clear your window by closing all tabs at once.

Log out of the program.

### **Is RB missing something?**

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

**While RB Lite has a reduced feature list, you can make suggestions for improving it in the Idea Collaborator. If others vote for your idea, it could be added in a future update.**

## Help section

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

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 suggestions for improving RB Lite.

Look up the current version of RB Lite.



## Functions in RB Lite vs RB9

This chart lists all RB9 functions, showing which are included in RB Lite and which are not.

○ = included X = not included

| Function   | RB Lite | RB9 |
|--|---------|-----|
| <b>Personal</b>                                    |         |     |
| Log In   | ○       | ○   |
| Notifications and Messages                         | ○       | ○   |
| Change Password                                    | ○       | ○   |
| Locked Data  | ○       | ○   |
| User Preferences                                   | ○       | ○   |
| Close All Tabs                                     | ○       | ○   |
| Log Out  | ○       | ○   |
| <b>Calendar</b>                                    |         |     |
| Cases  | ○       | ○   |
| Jobs (List View)                                   | ○       | ○   |
| Jobs (Monthly View)                                | ○       | ○   |
| Jobs (Weekly View)                                 | X       | ○   |
| Send Job Confirmations/<br>Cancellations           | ○       | ○   |
| Tasks  | ○       | ○   |
| Resource Availability                              | ○       | ○   |
| Quick Assignment                                   | X       | ○   |
| Resource Blast                                     | X       | ○   |
| Send Assignment<br>Notifications/<br>Cancellations | ○       | ○   |
| Daily Calendar Audit                               | ○       | ○   |
| Send Future Calendar                               | X       | ○   |
| Job Printout                                       | ○       | ○   |
| Job Analysis                                       | X       | ○   |
| Tasks in Progress                                  | ○       | ○   |
| Send Overdue Tasks<br>Report                       | ○       | ○   |
| Assignment Analysis                                | X       | ○   |
| <b>Production</b>                                  |         |     |
| Turn In  | ○       | ○   |

| Function                          | RB Lite | RB9 |
|-----------------------------------|---------|-----|
| Tracking                          | X       | ○   |
| Production Sheets                 | ○       | ○   |
| Envelopes and Labels              | X       | ○   |
| Shipping                          | X       | ○   |
| Letters                           | X       | ○   |
| Send Originals Out                | X       | ○   |
| Repository                        | ○       | ○   |
| PDF Transcripts                   | X       | ○   |
| Create Master Word List           | X       | ○   |
| Link Exhibits                     | X       | ○   |
| <b>Billing</b>                    |         |     |
| Post Invoices                     | ○       | ○   |
| COD Invoices                      | ○       | ○   |
| Send Invoices                     | ○       | ○   |
| Transfer Invoice                  | ○       | ○   |
| Export Invoices                   | X       | ○   |
| <b>Inquiry</b>                    |         |     |
| Invoice Inquiry                   | ○       | ○   |
| Client Activity                   | ○       | ○   |
| Client Analysis                   | X       | ○   |
| Resource Activity                 | ○       | ○   |
| Resource Analysis                 | X       | ○   |
| Witness Inquiry                   | ○       | ○   |
| Receivable Transaction<br>Inquiry | ○       | ○   |
| Anniversary Inquiry               | X       | ○   |
| Marketing Inquiry                 | X       | ○   |
| <b>Receivables</b>                |         |     |
| Receive Payments                  | ○       | ○   |
| Enter Other Transactions          | ○       | ○   |
| Resource Billings Report          | X       | ○   |
| Daily Register                    | ○       | ○   |



## Functions in RB Lite vs RB9-continued

| Function                              | RB Lite | RB9 |
|---------------------------------------|---------|-----|
| Daily Balance Log                     | X       | O   |
| Finance Charges                       | O       | O   |
| Monthly Journals                      | O       | O   |
| Aged A/R                              | O       | O   |
| Send Statements                       | O       | O   |
| Client Account Activity               | X       | O   |
| Paid Invoices                         | X       | O   |
| Voided Invoices                       | X       | O   |
| Collection Letters                    | X       | O   |
| Collection Follow-up                  | X       | O   |
| Collection Forecast                   | X       | O   |
| Finance Charges                       | O       | O   |
| Monthly Journals                      | O       | O   |
| Aged A/R                              | O       | O   |
| Send Statements                       | O       | O   |
| Client Account Activity               | X       | O   |
| Paid Invoices                         | X       | O   |
| Voided Invoices                       | X       | O   |
| Collection Letters                    | X       | O   |
| Collection Follow-up                  | X       | O   |
| Collection Forecast                   | X       | O   |
| <b>Payables</b>                       |         |     |
| Override Resource Pay                 | O       | O   |
| Pay Adjustments                       | O       | O   |
| Pay Resources                         | O       | O   |
| Send Resource Pay Statements          | O       | O   |
| Print Checks                          | X       | O   |
| 1099 Pay Detail                       | X       | O   |
| Print 1099 Forms                      | X       | O   |
| Sales Commission Report               | X       | O   |
| Override Sales Commission             | X       | O   |
| Additional Resource Production Report | X       | O   |

| Function                       | RB Lite | RB9 |
|--------------------------------|---------|-----|
| Total Payable Report           | O       | O   |
| Sales Tax                      | X       | O   |
| Liability Balance Log          | X       | O   |
| Reward Points Summary          | X       | O   |
| Reward Points History          | X       | O   |
| Reward Points Analysis         | X       | O   |
| <b>Reports</b>                 |         |     |
| Business Analysis              | X       | O   |
| Gross Profit                   | X       | O   |
| Misc. Sales                    | X       | O   |
| Client Rating Report           | X       | O   |
| Insurance Billing              | X       | O   |
| Resource Production            | X       | O   |
| Original Pages Production      | X       | O   |
| Task Turnaround Analysis       | X       | O   |
| Daily Tracking Summary         | X       | O   |
| Tracking Productivity Analysis | X       | O   |
| <b>Tools</b>                   |         |     |
| Bulk Import                    | O       | O   |
| Bulk Update                    | O       | O   |
| Tag Manager                    | X       | O   |
| Form Templates                 | O       | O   |
| Label Templates                | X       | O   |
| Notes Finder                   | X       | O   |
| Repository Download Log        | X       | O   |
| Download Backup File           | X       | O   |
| Email Log                      | X       | O   |
| Query Maker                    | X       | O   |
| QuickBooks Integrator          | X       | O   |
| <b>Entities</b>                |         |     |
| Firms                          | O       | O   |
| Contacts                       | O       | O   |



## Functions in RB Lite vs RB9—continued

| Function                   | RB Lite | RB9 |
|----------------------------|---------|-----|
| Resources                  | ○       | ○   |
| Locations                  | ○       | ○   |
| Business Units             | ○       | ○   |
| <b>Setup</b>               |         |     |
| Lists                      | ○       | ○   |
| Chart of Accounts          | ○       | ○   |
| Service Item Subgroups     | ○       | ○   |
| Service Item Master        | ○       | ○   |
| Rush Type Master           | ○       | ○   |
| Billing Rates              | ○       | ○   |
| Pay Rates                  | ○       | ○   |
| Billing Sets               | ○       | ○   |
| Pay Dates                  | ○       | ○   |
| Invoice Headers            | ○       | ○   |
| Invoice Messages           | ○       | ○   |
| Tracking Steps             | X       | ○   |
| PDF Transcript Preferences | X       | ○   |
| PDF Transcript Stamps      | X       | ○   |
| Link Exhibits Patterns     | X       | ○   |
| Exhibit Stamps             | X       | ○   |

| Function                         | RB Lite | RB9 |
|----------------------------------|---------|-----|
| System Preferences               | ○       | ○   |
| <b>Connect</b>                   |         |     |
| Transcript Ordered               | X       | ○   |
| Publish COD Invoices             | X       | ○   |
| Fulfill Points Redemption Orders | X       | ○   |
| Transcript Packages              | X       | ○   |
| Create Full-Text Search          | X       | ○   |
| Approve Time-off                 | X       | ○   |
| Activity Log                     | X       | ○   |
| Support Tickets                  | X       | ○   |
| Connect Preferences              | X       | ○   |
| <b>Help</b>                      |         |     |
| User Guide                       | ○       | ○   |
| Online Training                  | ○       | ○   |
| Update History                   | ○       | ○   |
| Online Support: Team Viewer      | ○       | ○   |
| Live Chat                        | ○       | ○   |
| Send Feedback                    | ○       | ○   |
| About                            | ○       | ○   |

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

RB Lite is available by subscription only. Add or cancel user licenses as needed, upgrade to RB9, or cancel the whole system at any time without further obligation.

RB Lite is backed by an unconditional, 30-day, money-back guarantee, so you can try it risk-free. For more information about subscribing to RB Lite, visit our website.





## Benefits of RB Lite

RB Lite is not as comprehensive as RB9, but it contains the most essential RB9 functions for running a court reporting agency or other legal support business. And because it handles the technical side of your business, you can concentrate on your company, clients, and resources – not your server, software, repository, or system security.

### Nothing to install

RB Lite resides in the cloud and is accessed through a browser so you do not have to install anything on your computer. RB Lite is also platform independent, so you can use it on a Mac or PC, even a tablet. (We recommend using a device with the most RAM and fastest CPU you can for best performance.) RB Lite is optimized to work in all of the common browsers.

### Never buy a server

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

### Repository included

RB Lite includes a central file repository, so you no longer have

to keep hard copies of important information.

All files in your repository are stored in the cloud with your RB data with the same security and reliability. Your RB Lite subscription includes 100GB of repository storage. Storage capacity increases as needed, automatically.

### No backup needed

You don't have to deal with backing up data or repository files with RB Lite. Instead, 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.

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.

### Better security

Instead of dealing with ever-changing security risks and requirements, put your data in RB

Lite 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.

The RB Lite program provides other protection including user ID and password login with optional 2FA (two-factor authentication), restricted user access controls for all functions, uneditable notes logs, encrypted personal information, and required information fields.

### Less downtime

Server crashes are a serious cause of downtime, which translates to lost productivity and possibly lost business. RB Lite removes that threat by putting your 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. RB Lite solves this problem because it's just an internet connection, not a connection to an in-house network.



## More RB Lite benefits

### No re-keying

Information entered anywhere in the system automatically flows to where it's needed. This saves time and reduces errors. You can also import client and resource information from other apps.

### Support included

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

### Minimal financial commitment

There are no long-term obligations to using RB Lite, only a monthly subscription that you can cancel at any time with no on-going financial obligation. You can add or subtract user licenses as needed on a monthly basis too. The same applies to the

included file repository: the first 100GB of storage are included in the monthly subscription, and you add or subtract storage capacity as needed.

### Next version included

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 RB Lite system includes the RB server software and database, and one Named User License, which allows one user to access your RB Lite server through a browser. You add as many Named User Licenses as you have RB Lite users because each user must have their own unique user ID and password – just like other applications or services on the web that you

subscribe to or are a member of, such as a bank. Named User Licenses can be added or subtracted at any time as your needs change.

### Upgrade to RB9 anytime

If you ever want to increase the functionality of your system and offer more services, you can upgrade to the full RB9 system including plug-ins, if desired.

You can switch between RB9 and RB Lite without losing data, so if your business is cyclical, you can save money in lean months with RB Lite.

### Want to try RB Lite yourself?

If you are interested in trying RB Lite before making a commitment, you can explore the RB demo site.

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

### Want to learn more?

Visit [omti.com](http://omti.com) for more information and to sign up for weekly email lessons that cover all of RB9 and RB Lite, one function at a time.



Office Management Technologies Inc.

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

[omti.com](http://omti.com) | [info4@omti.com](mailto:info4@omti.com)

650-396-2105 | fax: 650-560-6550 | Product inquiries: 650-396-2111

ReporterBase software and services, which includes RB9 and RB Lite business management software for legal support firms, RB Connect online offices, and RB Connect Mobile, are developed and produced by OMTI, Inc., a privately held corporation. For more information, visit [omti.com](http://omti.com).