RB8 legal support firm software

Getting Started Guide

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Getting Started

The most important, yet often overlooked, step in implementing RB8 is the Setup step. RB8 is a complex database application containing more than 130 tables that are interconnected like a spider web. The more thought and time you put into the set-up, the more efficient your operation will be. Take your time. Do not hurry through this critical part of your RB8 deployment.

Learn how to set up and use RB8 as you prefer. Set up your company, client, resource and recurring job location information. Customize service item and rush charge lists. Set up groups to make billing and payables more accurate and efficient. Create invoice selections that suit your business.

Functions covered in this chapter:

Setup Workflow

Form Manager

Code Manager

Chart of Accounts

Business Units

Users and Groups

User Preferences

System Preferences

Service Items Subgroups

Service Items Master

Rush Type Master

Billing Rate Groups

Billing Rates

Pay Rate Groups

Pay Rates

Billing Sets

Invoice Headers

Invoice Messages

Pay Groups

Resources

Firms

Contacts

Locations

Installing RB8 Clients

Set-up Workflow

Set-up procedures suggested order

Before using RB8, you must enter information about your company, clients and resources, billing and pay rates, and other default information in the appropriate Setup tables. This flow chart suggests an optimum order to entering information, but you can enter or change information in any Setup table at any time.

1. Form Manager	*Form Manager* is a tool for managing forms and letters. Like *Microsoft Word,* it is a word processor with mail merge, but it's streamlined to work best with RB8. Form Manager has a set of common forms and letters built in. You can edit any existing form to better fit your company's needs and save it as a new form. (in **Tools** menu)
2. Code Manager	Drop-down lists allow users to choose an entry from a list. RB8 includes initial values for drop-down lists used throughout the system. You amend these values using a tool called *Code Manager.* (in **Tools** menu)
3. Chart of Accounts	Although RB8 is not a general accounting system, it requires certain account numbers to keep track of sales, cash receipts, accounts receivable, payable and other transactions. (in **Setup** menu)
4. Business Units	*Business Units* are your company's revenue centers or any entity in your business that you want to track separately, such as branch offices, other companies you own, affiliates and profit-sharing operations. (in **Setup** menu)
5. Users and Groups	To access RB8, you need a *User* account. In addition to program access, your user account authorizes what actions you can perform in RB8. The permissions for these actions come from which *Security Group(s)* you belong to. (in **Tools** menu)
6. User Preferences	Before using RB8, configure your workstation and set your custom defaults. Preferences entered here apply to your workstation only. They do not affect any other computers you might be connected to. (in **Personal** menu)
7. System Preferences	System Preferences is where you set the options for your RB8 system. It contains all of the preference settings that affect all users. (in **Tools** menu)
8. Service Items Subgroups	You can group all miscellaneous service items into *Service Subgroups*. Then, when billing, you can locate individual items quickly in their subgroups, instead of scrolling through a long, undifferentiated list of all of your miscellaneous service items. (in **Setup** menu)
9. Service Items Master	Regular charges that you bill to your clients are called *Service Items* in RB8. Service items are listed on your invoices to provide itemized details for your clients and third-party payers. In-house, they provide information to help you analyze your revenue streams. (in **Setup** menu)
10. Rush Type Master	The *Rush Type Master* lists all of the different expedited (rush) deliveries you provide along with their default billing and pay information. It drastically reduces the number of rate tables a typical court reporting firm needs. (in **Setup** menu)

continued

continued

11. **Billing Rate Groups**	The structure for grouping billing rate tables in RB8 is called the *Billing Rate Group.* Set up a billing rate group, then attach firms (or contacts) to it and create its related billing rate tables. (in **Tools > Code Manager** menu)
12. **Billing Rates**	For each billing rate group, create as many billing rate tables as you need. (in **Setup** menu)
13. **Pay Rate Groups**	RB8 has a structure for grouping related pay rate tables similar to Billing Rate Groups. A resource must be connected to a pay rate group. (in **Tools > Code Manager** menu)
14. **Pay Rates**	For each pay rate group, create as many pay rate tables as you need. (in **Setup** menu)
15. **Billing Sets**	*Billing Sets* contain service items that are usually billed together. They will speed up your billing process because instead of selecting items one at a time, you choose one of your preset groups of items. (in **Setup** menu)
16. **Invoice Headers**	RB8 automatically generates a standard invoice header for each witness based upon your input. Create your own custom headers for specific circumstances, then organize them into groups to save you time locating one when billing. (in **Setup** menu)
17. **Invoice Messages**	You can create and group messages in a similar way to invoice headers (above), which can then be selected and modified on individual invoices. (in **Setup** menu)
18. **Pay Groups**	If resources have different pay dates and cutoff dates, group them according to their pay period (frequency). These *Pay Groups* are unrelated to Pay Rate Groups, which classify resources according to their pay tier. (in **Tools > Code Manager** menu)
19. **Resources**	*Resources* provide your business with a service or support. Reporters, videographers, interpreters, scopists and account executives (sales reps) are examples of resources. Resources can also be other reporting agencies that cover jobs for your firm, or your in-house conference rooms. (in **Setup** menu)
20. **Firms**	*Firms* are entities with whom you do business, such as law firms, other court reporting firms, vendors, insurance companies, corporate clients and courts. The Firms table is your address book and information file on all of these entities. (in **Setup** menu)
21. **Contacts**	*Contacts* are individuals who work for firms you do business with, such as attorneys, paralegals, secretaries, claim adjusters, court clerks and other contacts. The Contacts table is where data on all of these individuals is stored. (in **Setup** menu)
22. **Locations**	*Locations* are places where jobs take place, such as court rooms or law offices. Since law firms and courts are normally entered in the Firms table as “firms,” use the Locations table for other types of locations where jobs recur, such as private residences, doctors’ offices, conference facilities or schools. (in **Setup** menu)

Form Manager

Form Manager is a tool for managing forms and letters. Like *Microsoft Word,* it's a word processor with mail merge, but it's streamlined to work best with RB8.

It's also smart: Instead of listing every available RB8 data field for you to scroll through, its *Data Source Manager* lets you select a form type, such as witness letters or confirmations. Then it only displays fields related to that type, logically grouped into folders, so you can quickly find a specific merge field.

Form Manager

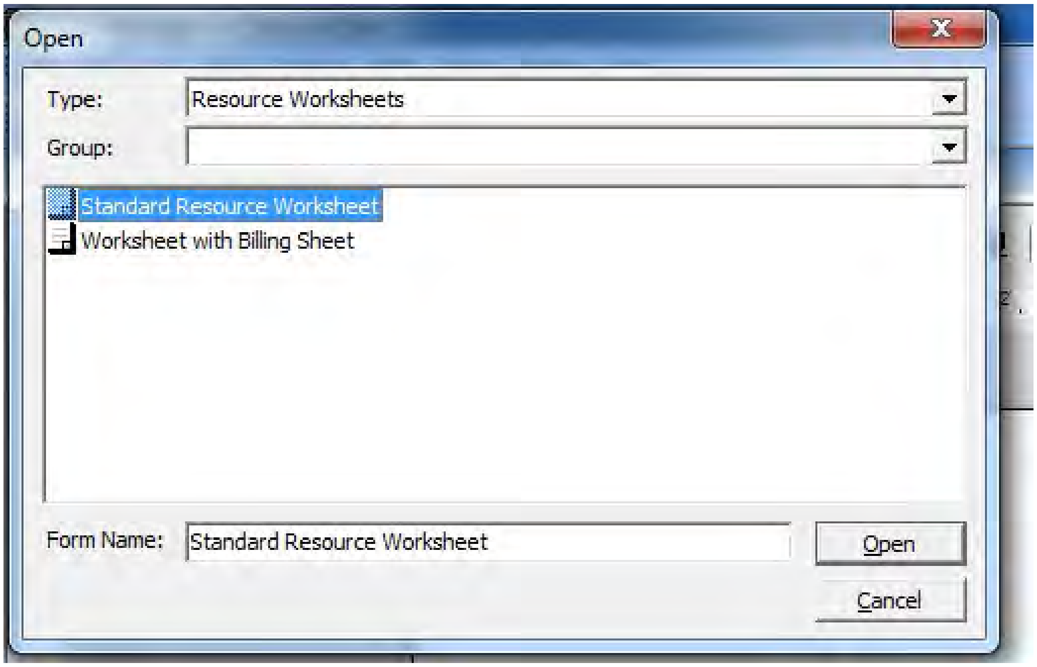
Creating forms and letters from templates

Form Manager has a set of common forms and letters built in. You can edit any existing form to better fit your company's needs and save it as a new form.

1. On the menu bar in RB8, click **Tools** > **Form Manager.**

2. Click **File** > **Open.**

3. Form templates are organized in groups. Select a category in the **Type** drop-down, then select an individual form and click **Open.**



Type: Resource Worksheets

Group:

Standard Resource Worksheet
Worksheet with Billing Sheet

Form Name: Standard Resource Worksheet

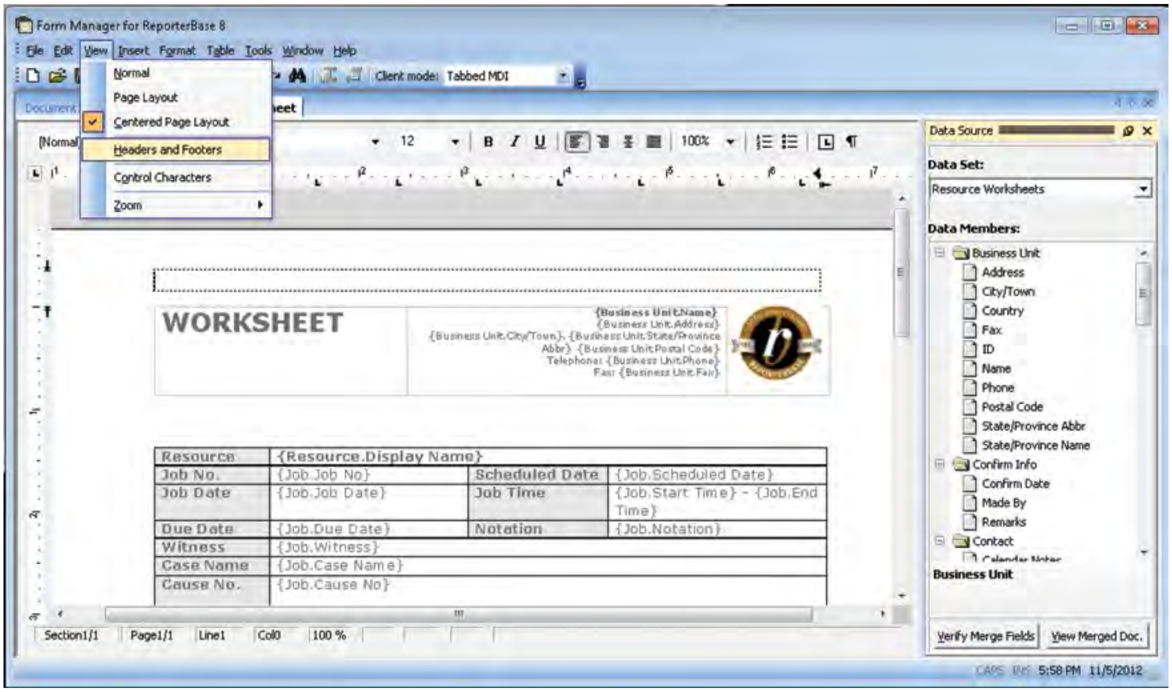
4. The form opens on the left in a *Word*-like interface. You can make changes in formatting, text, layout, etc. as you would in *Word.*

5. On the right side of the screen, the Data Source Manager lists merge data fields that are appropriate for the current form type. To add a field to the form, insert your cursor in the form where you want the new information, then double-click the field name under **Data Members.** The merge field name appears in the form surrounded by curly brackets {}.

6. Repeat step 5 for all of the fields you want to insert.

7. To remove a data field from the form, move the cursor over the field in the form. The cursor changes to a hand. Click to highlight, then press **Del.**

8. To add or edit a form's header and footer, select **View** > **Headers and Footers.** You can add merge data fields into the header or footer as in the rest of the form.


Form Manager for ReporterBase 8
File Edit View Insert Format Table Tools Window Help
Normal
Page Layout
Centered Page Layout
Headers and Footers
Control Characters
Zoom
Client mode: Tabbed MDI
Data Source
Data Set:
Resource Worksheets
Data Members:
Business Unit
Address
City/Town
Country
Fax
ID
Name
Phone
Postal Code
State/Province Abbr
State/Province Name
Confirm Info
Confirm Date
Made By
Remarks
Contact
Business Unit
Verify Merge Fields
View Merged Doc.
WORKSHEET
Resource
Job No.
Job Date
Due Date
Witness
Case Name
Cause No.
Scheduled Date
Job Time
Notation
Section1/1 Page1/1 Line1 Col0 100 %
5:58 PM 11/5/2012

9. To edit header and footer properties such as their distance from the page border, click the **Header and footer properties** button. To switch focus between the header and footer fields, click the **Switch between header and footer** button.

Header and footer properties

Switch between header and footer

10. To change the company logo or other graphic, see "Adding your company logo."

11. Click **File > Save As,** then enter your new form's name in the **Form Name** field and click **Save.**

IMPORTANT

Selecting **Save As** saves the new form with a new name and does not overwrite your existing form.

TIP

In the Data Source Manager, the **Data Set** drop-down lists the different groups of data fields. If you are working with an existing form, the **Data Set** drop-down automatically opens the correct set of data fields for the form. Do not select fields from other data sets. The data set must match the form type you are working with in the left pane. Click **Verify Merge Fields** to check that the merge fields on the form belong to the appropriate data set and will work on the form. Click **View Merged Doc** to see a preview of the document.

Form Manager

Adding your company logo

Sometimes all you need to do with the default RB8 forms is add your company logo.

1. With the form you want to update open in Form Manager, insert your cursor where you want to add your company logo or other graphic.
2. If you want to remove an existing graphic, click the image to highlight, then press **Del.**
3. Click **Insert > Image,** locate your new graphic and click **Open.**
4. Right-click on the image, then click the **Saving Options** tab.
5. Under Saving Style, click **Export image and embed file reference.** Click **OK.**

IMPORTANT

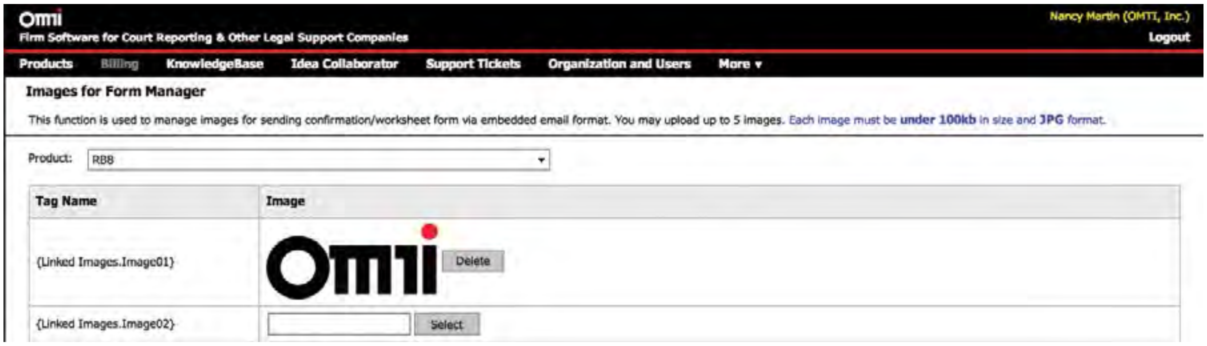
If you want to embed Job Confirmation, Job Cancellation or Resource Worksheet forms into the body of emails instead of attaching them as separate files, logos and other images that were inserted into the forms will not display. You must instead link images to the forms. See “Adding linked images.”

Form Manager

Adding linked images

If you want to save your clients and resources time, you can embed certain forms into the body of emails so they do not have to open attachments to read them. (See “Confirguring global options,” steps 5, 6 & 7.) However, if you want to add your company logo or other graphics to forms that will be embedded into emails, you must link the images to the forms instead of inserting them or else they will not display.

1. In OMTI’s Customer Portal (http://support.omti.com), click **More > Images for Form Manager.**
2. Click **Select** next to a linked image field, browse to find the image you want to use and click **Choose.**
3. Change an existing linked image by clicking **Delete,** then repeating step 2.



Images for Form Manager

This function is used to manage images for sending confirmation/worksheet form via embedded email format. You may upload up to 5 images. Each image must be **under 100kb** in size and **JPG** format.

Product: RB8

Tag Name	Image
{Linked Images.Image01}	
{Linked Images.Image02}	

NOTE

Linked images must be under 100kb in size and in JPG format.

The **Tag Name** is the merge field name you will use to insert the image into your form in Form Manager.

4. With the form you want to update open in Form Manager, insert your cursor where you want to add your linked image.

5. If there is an existing graphic, click the image to highlight, then press **Del.**

6. Double-click the linked image name under **Linked Images** in **Data Members.** The linked image name appears in the form surrounded by curly brackets {}.

NOTES

Forms that can be embedded into emails include Job Confirmation, Job Cancellation and Resource Worksheet. (See “Confirguring global options,” steps 5, 6 & 7.)

To see what the form with linked images will look like, preview an email notification before sending it out.

If you do not need your logo or other images in a form, we recommend not including them. Adding images increases the form’s file size causing it to take longer to send out. If you added multiple images to a form, and you’re sending multiple notifications at the same time, the process will be noticeably slower.

Form Manager

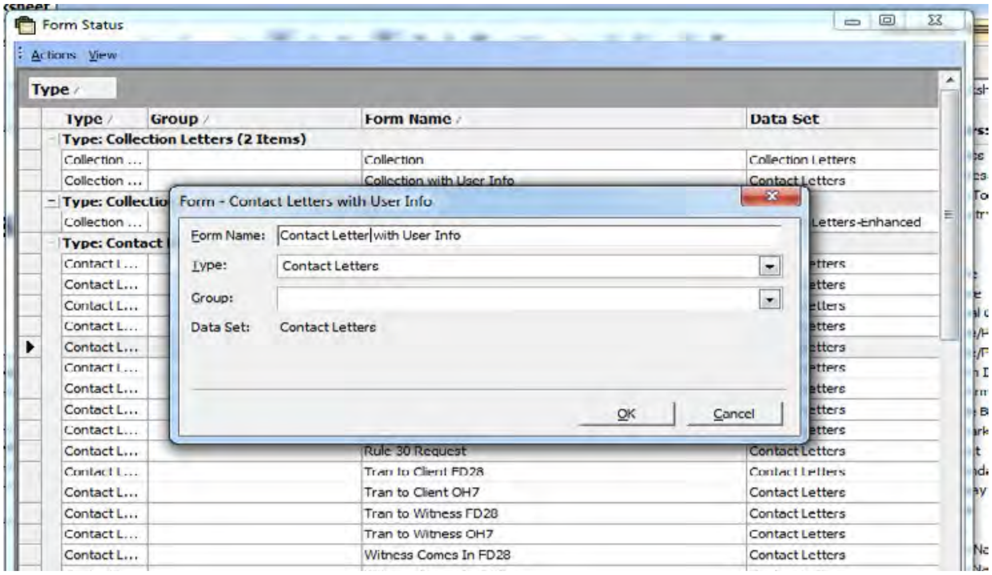
Deleting or reclassifying forms

In RB8’s Form Manager, you can delete forms you no longer need and change other forms’ name, form type and/or form group.

1. In RB8, click **Tools > Form Manager.**

2. In Form Manager, click **Tools > Change Form Status.**

3. In the Form Status window, click the form you want to delete or reclassify to highlight it.
    - **To delete the form,** right-click the highlighted form and click **Delete,** then click **Yes.**
    - **To reclassify the form,** double-click it. In the Form pop-up window, edit the name in the **Form Name** field, and/or select a new **Type** or **Group** in the corresponding drop-downs, then click **OK.**



Type: Collection Letters (2 Items)

Type	Group	Form Name	Data Set
Collection ...		Collection	Collection Letters
Collection ...		Collection with User Info	Contact Letters
Contact L...		Rule 30 Request	Contact Letters
Contact L...		Tran to Client FD28	Contact Letters
Contact L...		Tran to Client OH7	Contact Letters
Contact L...		Tran to Witness FD28	Contact Letters
Contact L...		Tran to Witness OH7	Contact Letters
Contact L...		Witness Comes In FD28	Contact Letters

Form Name: Contact Letter with User Info
Type: Contact Letters
Group:
Data Set: Contact Letters

WARNING

Changes made using **Change Form Status** are system-wide.

Form Manager

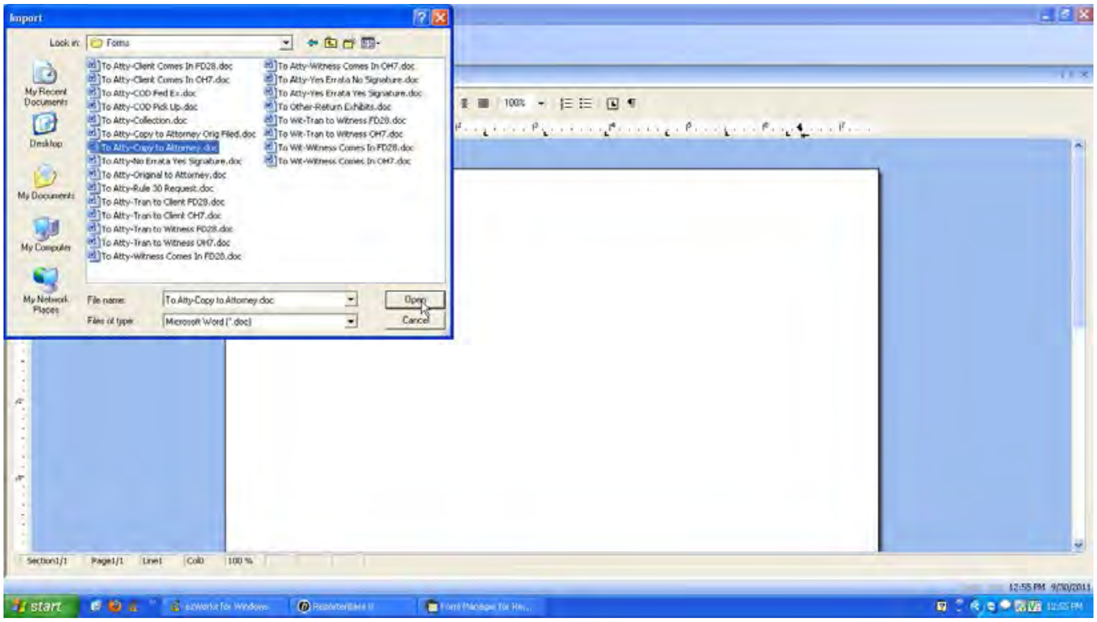
Importing your own forms into RB8 Form Manager

If you already have forms that you created as Word documents, you can easily add them to your RB Form Manager.

1. In RB8, click **Tools > Form Manager.**

2. Click **File > Import.**

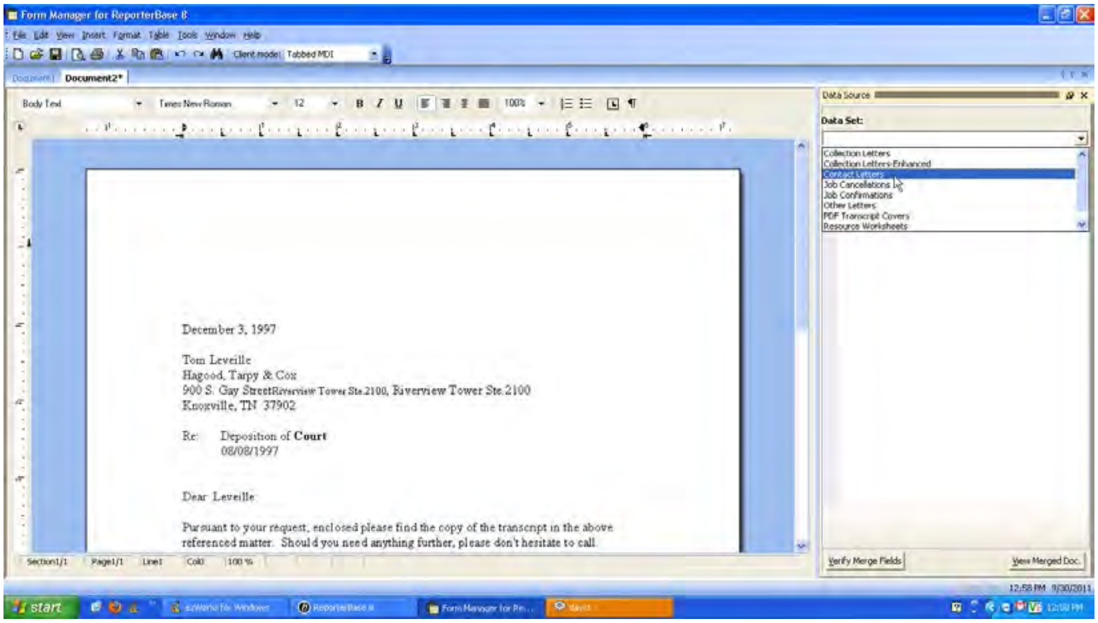
3. Locate the form you want to import (preferably a .doc file) and click **OK.**


Import
Look in: Forms
My Recent Documents
Desktop
My Documents
My Computer
My Network Places
To Atty-Client Comes In FD28.doc
To Atty-Client Comes In OH7.doc
To Atty-COD Fed Ex.doc
To Atty-COD Pick Up.doc
To Atty-Collection.doc
To Atty-Copy to Attorney Orig Filed.doc
To Atty-Copy to Attorney.doc
To Atty-No Errata Yes Signature.doc
To Atty-Original to Attorney.doc
To Atty-Rule 30 Request.doc
To Atty-Tran to Client FD28.doc
To Atty-Tran to Client OH7.doc
To Atty-Tran to Witness FD28.doc
To Atty-Tran to Witness OH7.doc
To Atty-Witness Comes In FD28.doc
To Atty-Witness Comes In OH7.doc
To Atty-Yes Errata No Signature.doc
To Atty-Yes Errata Yes Signature.doc
To Other-Return Exhibits.doc
To Wit-Tran to Witness FD28.doc
To Wit-Tran to Witness OH7.doc
To Wit-Witness Comes In FD28.doc
To Wit-Witness Comes In OH7.doc
Open
Cancel
start

File name: To Atty-Copy to Attorney.doc

Files of type: Microsoft Word (*.doc)

4. Click **Tools > Data Source Manager.** In the Data Source Manager, select the type of form you are importing in the **Data Set** drop-down.


Form Manager for ReporterBase 8
File Edit View Insert Format Table Tools Window Help
Client mode: Tabbed MDI
Document2*
Body Text
Times New Roman
12
100%
Data Source
Data Set:
Collection Letters
Collection Letters-Enhanced
Contact Letters
Job Cancellations
Job Confirmations
Other Letters
PDF Transcript Covers
Resource Worksheets
Verify Merge Fields
View Merged Doc.
start

December 3, 1997

Tom Leveille
Hagood, Tarpy & Cox
900 S. Gay StreetRiverview Tower Ste.2100, Riverview Tower Ste.2100
Knoxville, TN 37902

Re: Deposition of **Court**
08/08/1997

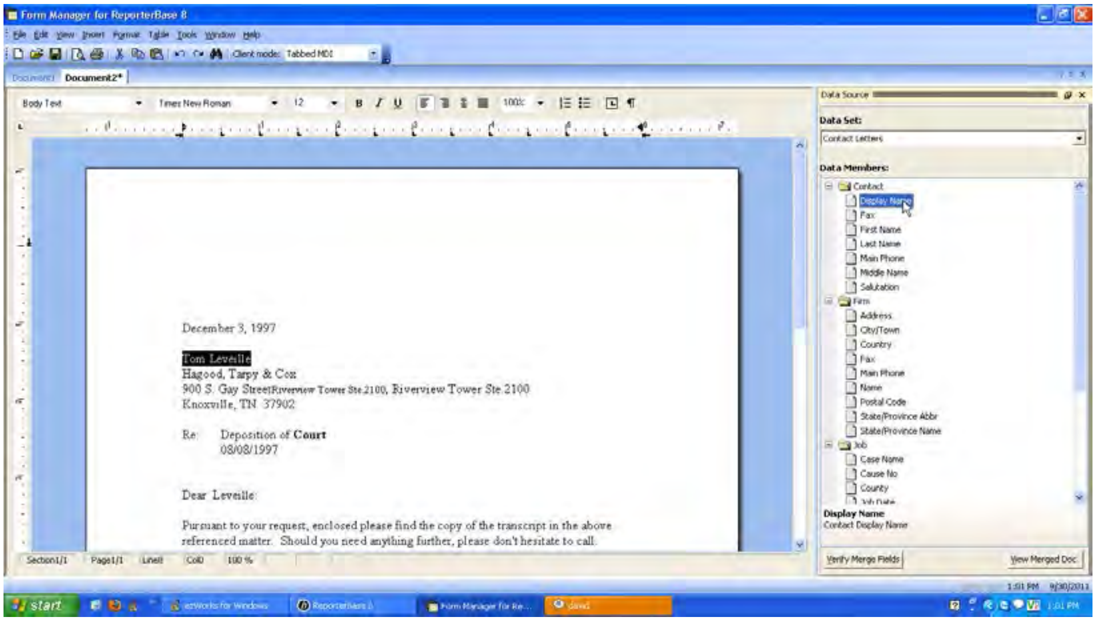
Dear Leveille

Pursuant to your request, enclosed please find the copy of the transcript in the above referenced matter. Should you need anything further, please don't hesitate to call.

NOTE

You can import other document types besides Word docs, such as .form, .htm, or .rtf, but their formatting might change when you open them in Form Manager, requiring some editing.

5. The appropriate merge fields appear in the Data Members window. Highlight data in your form that has a corresponding data member field, then double-click its **Data Members** field name in the Data Source Manager to change the selected text in your form into a merge field.



December 3, 1997

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Hagood, Tarpy & Cox
900 S. Gay StreetRiverview Tower Ste.2100, Riverview Tower Ste 2100
Knoxville, TN 37902

Re: Deposition of **Court**
08/08/1997

Dear Leveille:

Pursuant to your request, enclosed please find the copy of the transcript in the above referenced matter. Should you need anything further, please don't hesitate to call.

Data Set: Contact Letters

Display Name
Contact Display Name

Form Manager for ReporterBase 8
Document2*
Body Text
Times New Roman
12
Data Source
Data Members:
Contact
Display Name
Fax
First Name
Last Name
Main Phone
Middle Name
Salutation
Firm
Address
City/Town
Country
Fax
Main Phone
Name
Postal Code
State/Province Abbr
State/Province Name
Job
Case Name
Cause No
County
Verify Merge Fields
View Merged Doc
1:01 PM 9/30/2011

6. Repeat step 5 to add all of your merge fields to the form.

7. When finished, click **File > Save As.**

8. In the Save As dialog box, select a form group (if applicable) in the **Group** drop-down (see “Creating form groups”) and enter your form’s name in the **Form Name** field and click **Save.**

Form Manager

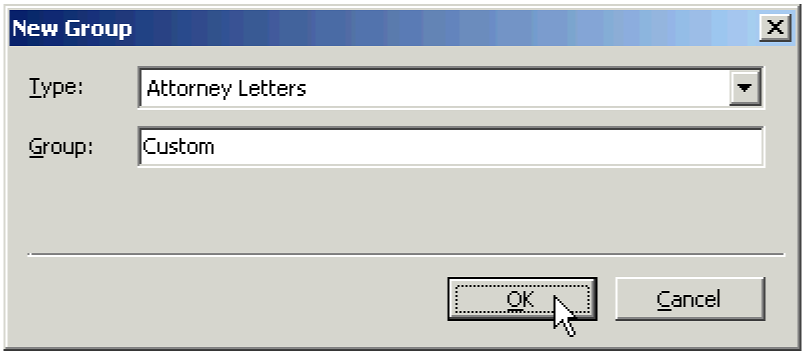
Creating form groups

You can group documents by category to make maintenance easier. Form Manager comes with a default set of document categories, which you can amend.

1. In the Form Manager window, click **Tools** > **Group Manager.**

2. In the Group Manager window, all existing groups appear. Right-click on the grid, then choose **New.**

3. In the New Group window, select a category in the **Type** drop-down, then enter the group name.



Type: Attorney Letters

Group: Custom

New Group
OK
Cancel

4. Click **OK.**

Code Manager

Drop-down lists in RB8 allow users to choose an entry from a list, which appears immediately below a selected field and displays available values. RB8 includes initial values for drop-down lists used throughout the system. You amend these values using a tool called *Code Manager.*

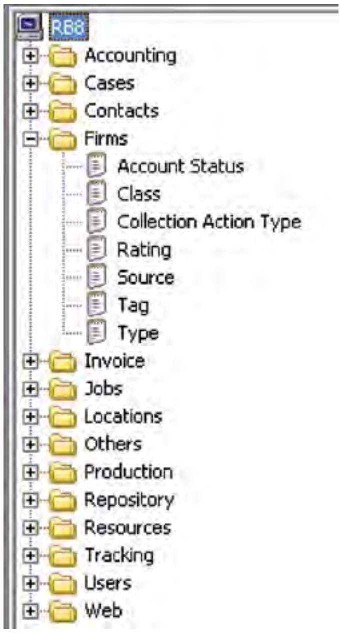
Code Manager

Adding drop-down entries

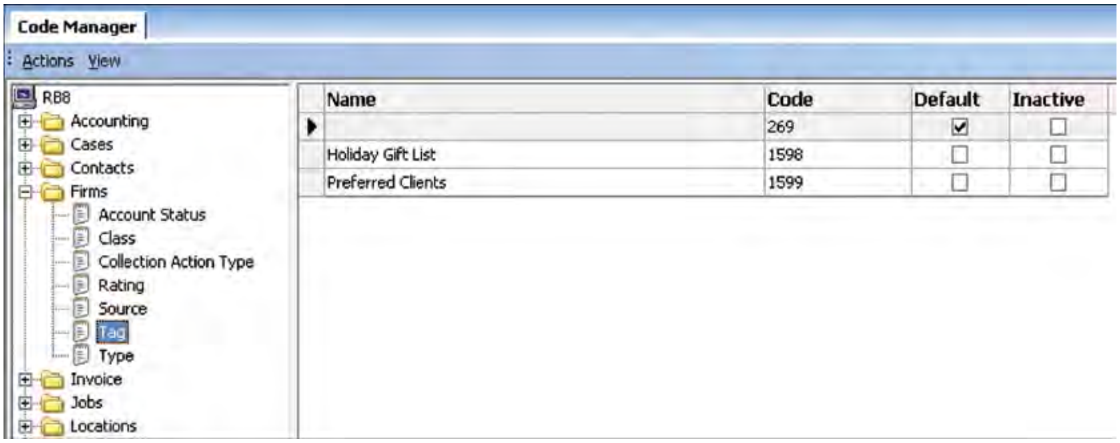
Use Code Manager to customize RB8 drop-down lists to fit your business.

1. On the menu bar in RB8, click **Tools** > **Code Manager.**

2. On the left side of the Code Manager window, folders appear representing the main categories. Click the "+" next to a folder (or double-click the folder) to open the folder, displaying its subcategories underneath.


RB8
Accounting
Cases
Contacts
Firms
Account Status
Class
Collection Action Type
Rating
Source
Tag
Type
Invoice
Jobs
Locations
Others
Production
Repository
Resources
Tracking
Users
Web

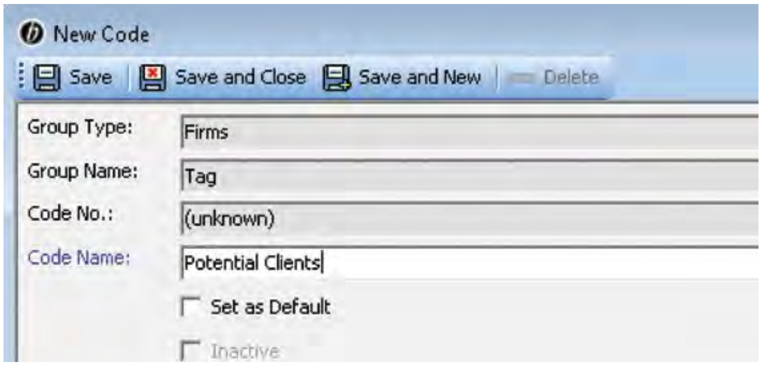
3. Click a subcategory to display all of the values entered so far as a grid in the Results pane.


Code Manager
Actions
View
RB8
Accounting
Cases
Contacts
Firms
Account Status
Class
Collection Action Type
Rating
Source
Tag
Type
Invoice
Jobs
Locations

Name	Code	Default	Inactive
	269	☑	☐
Holiday Gift List	1598	☐	☐
Preferred Clients	1599	☐	☐

4. To add a new code, click **Actions** (or right-click on the grid), then choose **New.**

5. In the New Code window, **Code No.** is not an input field and is generated by the system automatically when you save. Enter the following information:
   - **Code Name (required)** – Enter the description for this code. You can leave this field blank to add a code with no description.
   - **Set as Default** – Check this box to make the code appear as the default choice.



Group Type: Firms
Group Name: Tag
Code No.: (unknown)
Code Name: Potential Clients
☐ Set as Default
☐ Inactive

6. Click **Save and Close.**

Code Manager

Removing drop-down values

There are three ways to remove codes from RB8 when you no longer need them: deleting, merging or de-activating. You can delete any code as long as it is not required by RB8 or there are no records associated with it.

If you have a code that duplicates another (for example, if you made a code for ASCII transcripts but RB requires files to use the default ASCII file type for creating PDF transcripts or mobile transcripts), you can merge the duplicate into the other. All files that were stored under the duplicate code will be updated to the remaining code.

If RB8 does not allow you to delete a code you set up because it is in use but you do not want to merge it into another code, make it *inactive* instead. Inactive codes do not appear in drop-downs when you are creating new records.

To delete a code:

If the code is not an RB8-required code or has no records associated with it, select it in the Code Manager Results pane, then click **Actions** > **Delete.**

To merge codes:

1. If the code is not an RB8-required code, select it in the Code Manager Results pane, then click **Actions** > **Merge To.**

2. In the Merge To-File Type window, highlight the file type you want to merge the duplicate file type into, then click **Select.**

3. In the pop-up window that appears, click **Yes.**

To de-activate a code:

1. Right-click the code in the Code Manager Results pane, then choose **View.**
2. Check **Inactive.**
3. Click **Save and Close.**

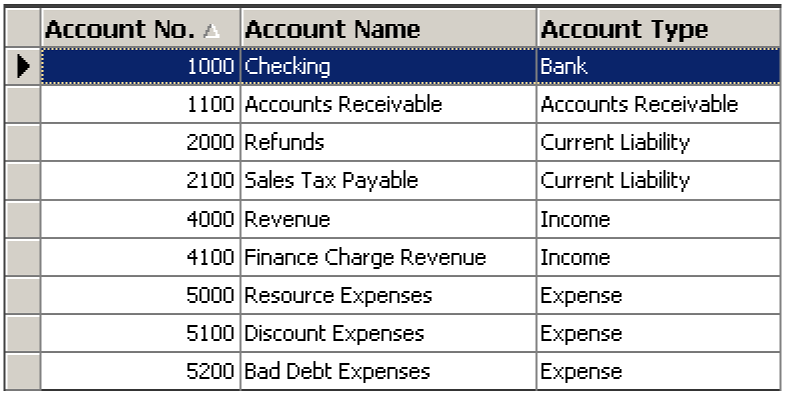
NOTE

If you select an RB8-required code and click **Actions,** or right-click the code, **Delete** and **Merge To** appear grayed out and are disabled.

Chart of Accounts

The *Chart of Accounts* is a listing of all of the accounts in the general ledger, each account accompanied by a reference number (account number). Although RB8 is not a general accounting system, it still needs certain account numbers to keep track of sales, cash receipts, accounts receivable, payable and other transactions. RB8 requires the following accounts and assigns them these default numbers:

RB8-required default account numbers



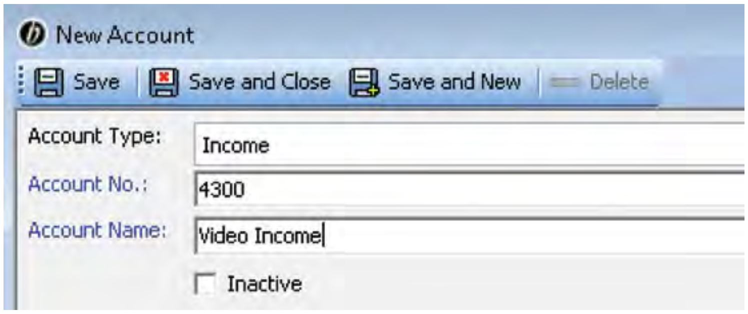
Account No.	Account Name	Account Type
1000	Checking	Bank
1100	Accounts Receivable	Accounts Receivable
2000	Refunds	Current Liability
2100	Sales Tax Payable	Current Liability
4000	Revenue	Income
4100	Finance Charge Revenue	Income
5000	Resource Expenses	Expense
5100	Discount Expenses	Expense
5200	Bad Debt Expenses	Expense

Chart of Accounts

Adding accounts

You can add accounts to RB8's list of required accounts to customize RB8 to your business.

1. On the menu bar in RB8, click **Setup** > **Chart of Accounts.**
2. Click **Actions** (or right-click on the grid), then choose **New.**
3. In the New Account window, enter the following information:
    - **Account Type** – Select an account type in the drop-down.
    - **Account No. (required)** – Enter the number for this account. (See Best Practices at the end of the Chart of Accounts section.)
    - **Account Name (required)** – Enter the name for this account.



Account Type: Income

Account No.: 4300

Account Name: Video Income

☐ Inactive

4. Click **Save and Close.**

Chart of Accounts

Removing accounts

There are two ways to remove accounts from RB8 when you no longer need them: deleting or de-activating. You can delete any account as long as it is not an RB8-required account (see “Chart of Accounts”) or there are no records associated with it.

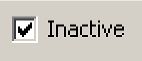
If RB8 does not allow you to delete an account you set up because it is in use, make it *inactive* instead. The account remains in your RB8 database, but it no longer appears in drop-downs or reports.

To delete an account:

If the account is not an RB8-required account or has no records associated with it, select it in the Chart of Accounts window, then click **Actions** > **Delete.**

To de-activate an account:

1. With the account selected in the Chart of Accounts window, click **Actions** > **View;** or right-click the account, then choose **View.**
2. In the account detail window, check **Inactive.**



☑ Inactive

3. Click **Save and Close.**

Chart of Accounts

Editing accounts

You can change the name of an account, but not the account number. If you want to change an account number, you must delete it first, then add it as a new account. (See “Removing accounts.”)

1. With the account selected in the Chart of Accounts window, click **Actions** > **View;** or right-click the account, then choose **View.**
2. Edit the name in the detail window.

BEST PRACTICES

As you enter accounts, group them according to type by assigning them numbers within a set range for each type. For example, assign all asset-type accounts four-digit numbers that begin with “1.” Check with your accountant before finalizing the way you use numbers, but the example presented below is a common approach.

1xxx	Assets
2xxx	Liabilities
3xxx	Equity
4xxx	Income
5xxx	Expenses
6xxx	Expenses
7xxx	Expenses
8xxx	Expenses
9xxx	Other Income and Expenses

Business Units

Business Units are your company's revenue centers or any entity in your business that you want to track separately, such as branch offices, other companies you own, affiliates and profit-sharing operations. In RB8, you can have an unlimited number of business units.

Business Units

Setting up business units

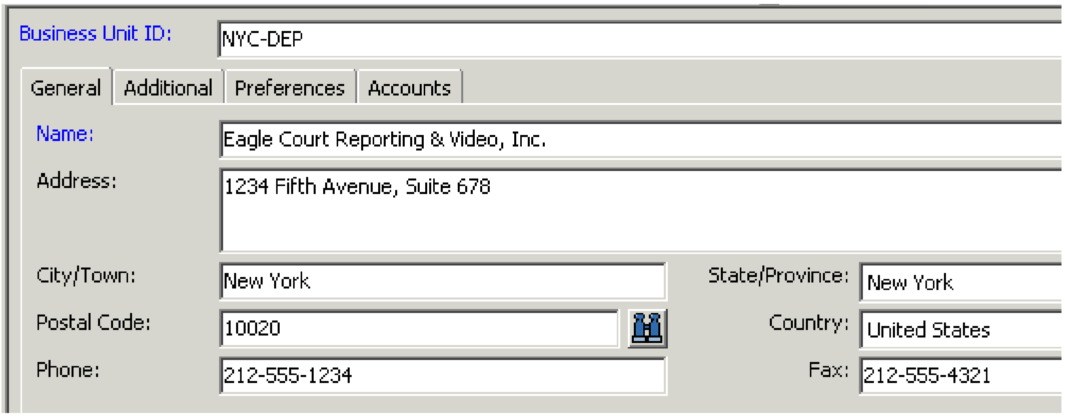
Add your company's revenue centers to RB8 as different business units, so you can track and report their activities separately.

1. On the menu bar in RB8, click **Setup** > **Business Units.**

2. Click **Search.** Any business units already set up appear in the right-side grid.

3. Double-click an existing unit to update its information. Or right-click on the grid, and choose **New** to add a unit.

4. In the Business Unit-[name]/New Business Unit window, the **General** tab is automatically selected. Edit/enter the business unit ID, name, address and phone numbers. For the business unit ID, enter an abbreviation that is concise and meaningful. (See Best Practices at the end of this section).



Business Unit ID: NYC-DEP

Name: Eagle Court Reporting & Video, Inc.

Address: 1234 Fifth Avenue, Suite 678

City/Town: New York

State/Province: New York

Postal Code: 10020

Country: United States

Phone: 212-555-1234

Fax: 212-555-4321

TIP

You do not need to enter the **City/Town, State/Province** or **Country.** Enter the **Postal Code** (zip code), and press the **Tab** key, then the **Enter** key. Or click the binoculars button. RB8 will automatically populate the other address fields correctly.

5. Click the **Additional** tab. Enter your web address and tax ID number. In the **Remit To** drop-down, choose the business unit to be displayed in the remittance section of invoices and statements, and select terms in the **Payment Terms** drop-down.

6. Click the **Preferences** tab. Enter the following information:
   - **Job due in** – Number of business days jobs are due in (for regular deliveries). RB8 automatically calculates a job's due date, excluding weekends but not holidays. This value will be overridden for jobs for firms that have their own **Job due in** preference. (See "Setting up firms.")
   - **Late charge in** – Number of days before a late charge is added to the invoice amount. Works with the **Late Charge** specified in the firm being billed. (See "Setting up firms" for information on entering late charge percentages.)

- **Pages to deduct** – Number of pages to deduct from the transcript pages when calculating resources' pay. This default can be overridden for a specific job at the time of billing.
- **Print name and addresses on invoices/Print name and addresses on statements** – Check these boxes to have your company name and address appear on your invoices and statements.
- **Do not show when number of unit is one** – Check this box if you want to hide the number of units on invoices for any service item that you are only billing one unit of *(this is RB's default).* Uncheck this box if you always want to show the number of units being billed, even when it is a single unit.
- **Show rate per unit when detailed** – Check this box if you want to show rates of all service items billed on detailed invoices.
- **Apply cutoff to payments also** – Check this box to apply the payroll cutoff date to the date payment is made by your client. If left unchecked, the payroll cutoff date uses the invoice date. (See "Setting up pay dates.")
- **Preprinted Invoice** and **Preprinted Statement** – Check these boxes if you have preprinted forms. RB8 will print information only, no boxes or lines.

7. Click the **Accounts** tab. In each drop-down, choose the appropriate account number. (See "Chart of Accounts.")

8. If this is a new business unit, click **Save.** In the RB8 pop-up window, click **Yes** to allow all users access to this business unit or No to deny access. Two new tabs, **Logo Image** and **PDF Transcript Logo Image,** appear.

9. Click the **Logo Image** tab, then **Upload Image.** Check that your logo file conforms to the instructions below the image field.

10. Locate and select the JPEG file you want to appear as your company logo on invoices and statements. Then click **Open.**

11. Click the **PDF Transcript Logo Image** tab, then **Upload Image.** Check that your transcript logo file conforms to the instructions below the image field.

12. Locate and select the JPEG file you want to appear as your company logo on PDF transcripts. Then click **Open.**

13. Click **Save and Close.**

BEST PRACTICES

If you have multiple office locations and each location has multiple business units, you might want to create business unit IDs in a way similar to the following example:

LA-DEP	Los Angeles – Deposition	SF-TP	San Francisco – Trial Presentation
LA-VID	Los Angeles – Video	SD-DEP	San Diego – Deposition
LA-VC	Los Angeles – Videoconferencing	SD-DOC	San Diego – Document Depository
SF-DEP	San Francisco – Deposition	OC-IMG	Orange County – Scanning and Imaging
SF-VID	San Francisco – Video	OC-REF	Orange County – Referral Work

TIPS

A quick way to add more business units is to copy (replicate) an existing business unit:

1. On the business unit list, right-click a business unit to copy from, then choose **Copy.**
2. Modify only those fields that are different, including the business unit ID. Then click **Save and Close.**

If you close an office or re-organize and want to remove a business unit, but keep its data, right-click the business unit, then choose **Merge To.** In the Merge Business Unit window, double-click the business unit you want to add the closing business unit's historical data to. In the RB8 pop-up window, click **Yes.**

Users and Groups

To access RB8, you need a *User Account.* In addition to program access, your user account authorizes what actions you can perform in RB8. (See “Creating user accounts.”)

The permissions for these actions come from which *Security Group(s)* you belong to. A user must be a member of at least one security group. The permissions and rights granted to a security group are assigned to its members. (See “Creating security groups.”)

In addition to security groups, RB8 also includes *Message Groups,* so you can send a message to all the members of a group simultaneously; and *Alert Groups,* who receive automatic notices from the system when specific events occur, such as a job cancellation. (See “Creating message groups” and “Adding members to alert groups.”)

Users and Groups is the tool you use to manage RB8 users and groups.

Users and Groups

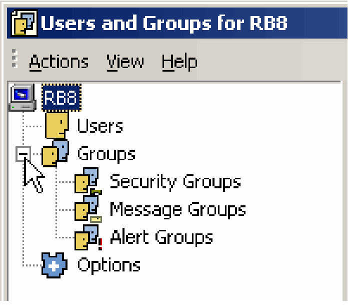
Creating security groups

An important security feature of RB8 is the ability to limit groups to performing only the actions for which you assign them rights and permissions. Assign permissions to security groups first, then add users to the groups. Belonging to a security group gives a user rights and abilities to perform various tasks.

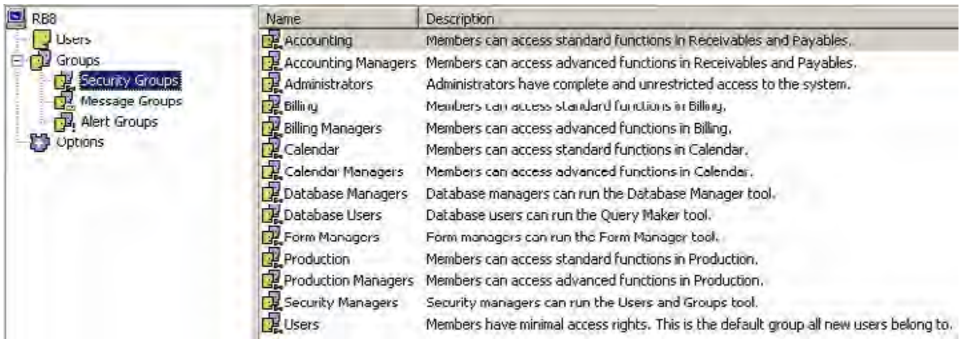
Default security groups are included when RB8 is initially installed. These built-in groups have been granted useful collections of rights and permissions. In most cases, built-in groups provide all of the capabilities needed by a particular user.

1. To add a new security group, click **Tools** > **Users and Groups** on the RB8 menu bar.

2. On the left side of the Users and Groups for RB8 window, icons appear representing the main categories. Click the “+” next to **Groups** (or double-click **Groups)** to expand the level, displaying its subcategories underneath.

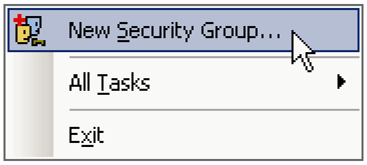


3. Click **Security Groups** to display all of the existing security groups in the Results pane.

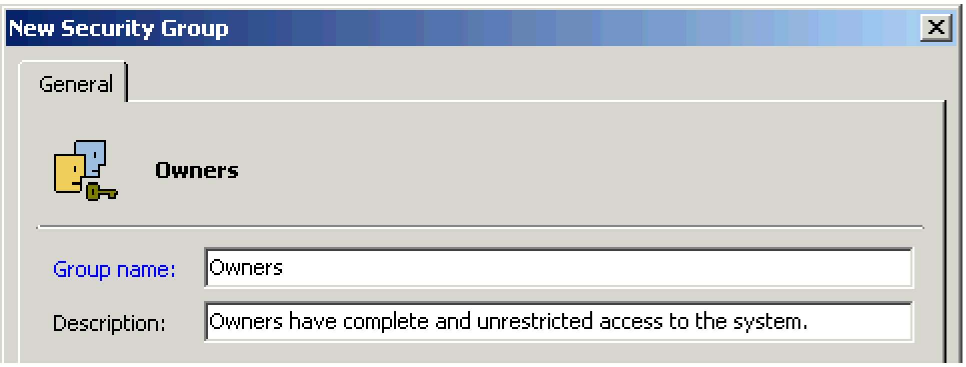


Name	Description
Accounting	Members can access standard functions in Receivables and Payables.
Accounting Managers	Members can access advanced functions in Receivables and Payables.
Administrators	Administrators have complete and unrestricted access to the system.
Billing	Members can access standard functions in Billing.
Billing Managers	Members can access advanced functions in Billing.
Calendar	Members can access standard functions in Calendar.
Calendar Managers	Members can access advanced functions in Calendar.
Database Managers	Database managers can run the Database Manager tool.
Database Users	Database users can run the Query Maker tool.
Form Managers	Form managers can run the Form Manager tool.
Production	Members can access standard functions in Production.
Production Managers	Members can access advanced functions in Production.
Security Managers	Security managers can run the Users and Groups tool.
Users	Members have minimal access rights. This is the default group all new users belong to.

4. Click **Actions** (or right-click **Security Groups**), then choose **New Security Group.**


New Security Group…
All Tasks
Exit

5. In the New Security Group window, enter the group name and description.


New Security Group
General
Owners

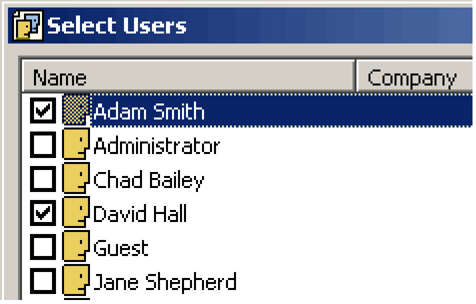
Group name: Owners

Description: Owners have complete and unrestricted access to the system.

6. Click **OK.**

7. Double-click the group you've just created, then click **Add.**

8. In the Select Users window, check all of the users belonging to this group, then click **OK.** (To add more users to the Select Users window, see "Creating user accounts.")


Select Users

Name	Company
☑ Adam Smith	
☐ Administrator	
☐ Chad Bailey	
☑ David Hall	
☐ Guest	
☐ Jane Shepherd	

TIP

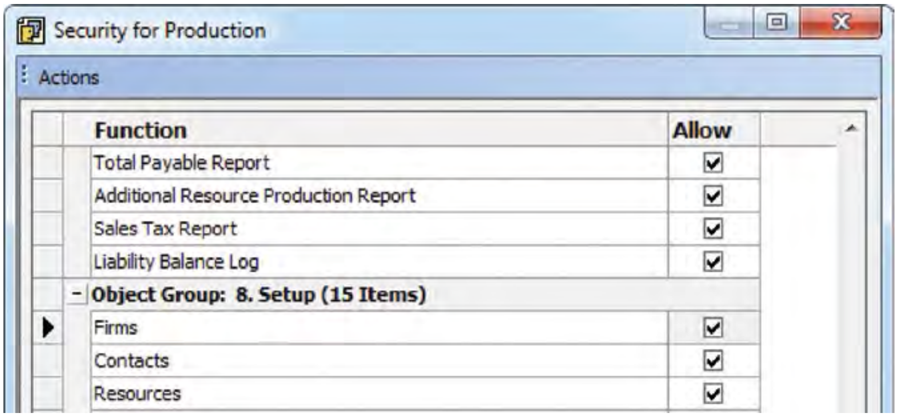
You can make changes to a group by double-clicking it and revising any fields in the [group name] Properties window.

Users and Groups

Setting security permissions

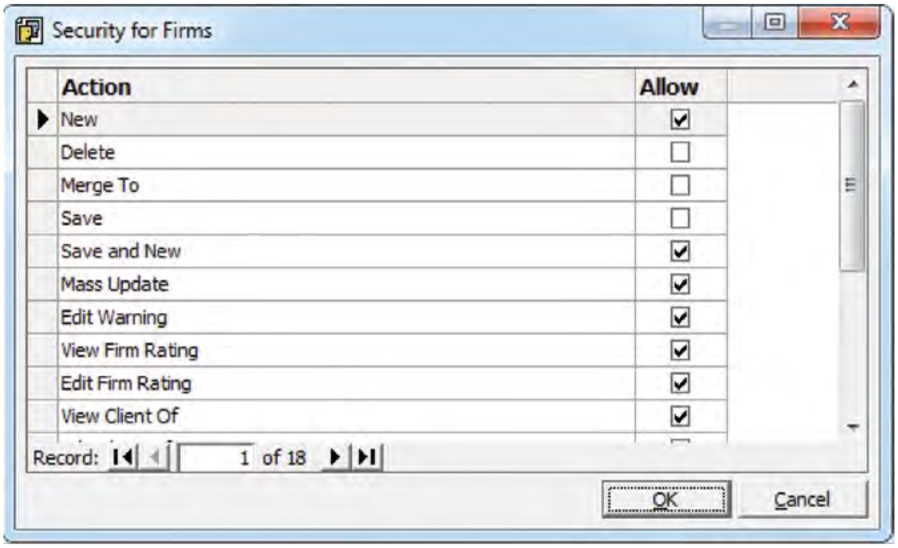
After adding all of the members to a new security group, the next step is to set the group's security permissions. Permissions have two levels: First, give a group permission for a specific RB8 function, such as Firms access. Second, give the group permission for specific actions within that function. For example, if you want your production department to be able to view firm information, but not edit it.

1. Right-click the group you want to set security permissions for, then choose **All Tasks** > **Change Security.**
2. In the Security for [group name] window, all of the functions that are available on the menu bar in RB8 appear. Check the **Allow** box next to each function to either grant or deny permission.



Function	Allow
Total Payable Report	☑
Additional Resource Production Report	☑
Sales Tax Report	☑
Liability Balance Log	☑
− Object Group: 8. Setup (15 Items)	
Firms	☑
Contacts	☑
Resources	☑

3. After setting this first level of security settings for the group, double-click an allowed function.
4. In the Security for [function name] window, all of the actions that are available for the function are listed. Check the **Allow** box next to each action to either grant or deny permission.



Action	Allow
New	☑
Delete	☐
Merge To	☐
Save	☐
Save and New	☑
Mass Update	☑
Edit Warning	☑
View Firm Rating	☑
Edit Firm Rating	☑
View Client Of	☑

5. Click **OK.** Repeat steps 2 through 4 for each function.

TIP

After entering all of the security settings for one security group, use **All Tasks** > **Copy Security Settings** and **Paste Security Settings** to speed setting up other security groups.

Users and Groups

Creating message groups

In RB8's Message Center, you can send messages to individual users and/or message groups. (See "Communicating within RB8.") Set up groups such as "Managers," "Everyone" and "Calendar" so that you can send a message to many people at the same time.

1. On the left side of the Users and Groups for RB8 window, click the "+" next to **Groups** (or double-click **Groups),** then **Message Groups** to display all of the existing message groups in the Results pane.

2. Click **Actions** (or right-click **Message Groups),** then choose **New Message Group.**

3. In the New Message Group window, enter the group name and description.

4. Click **OK.**

5. Double-click the group you've just created, then click **Add.**

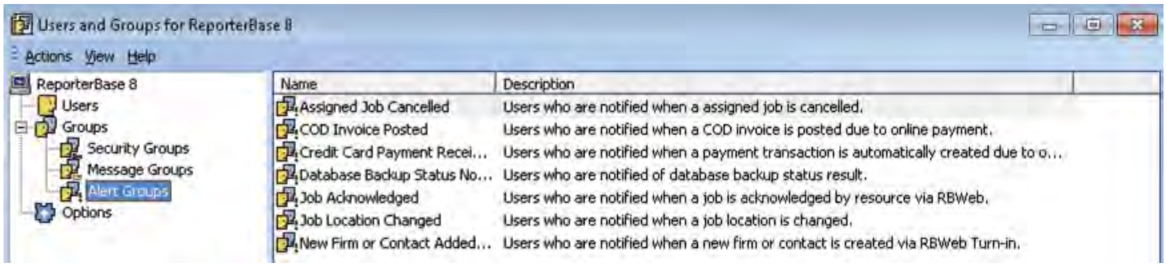
6. In the Select Users window, check all of the users belonging to this group, then click **OK.** (To add more users to the Select Users window, see "Creating user accounts.")

Users and Groups

Adding members to alert groups

Alert groups are sets of users who should be notified in the case of an alert, such as a job cancellation, location change or backup failure. Alert groups are preset by the system, so you cannot create new alert groups. However, you can add or remove alert group members.

1. On the left side of the Users and Groups for RB8 window, click **Groups,** then **Alert Groups** to display the alert groups set up by the system in the Results pane.



Name	Description
Assigned Job Cancelled	Users who are notified when a assigned job is cancelled.
COD Invoice Posted	Users who are notified when a COD invoice is posted due to online payment.
Credit Card Payment Recei...	Users who are notified when a payment transaction is automatically created due to o...
Database Backup Status No...	Users who are notified of database backup status result.
Job Acknowledged	Users who are notified when a job is acknowledged by resource via RBWeb.
Job Location Changed	Users who are notified when a job location is changed.
New Firm or Contact Added...	Users who are notified when a new firm or contact is created via RBWeb Turn-in.

2. Double-click an alert group you want to modify, then choose **Add.**

3. In the Select Users window, check all of the users belonging to this group, then click **OK.** (To add more users to the Select Users window, see "Creating user accounts.")

NOTE

Alerts are sent via RB8's Message Center, the internal email-like system used for both custom and automatic messages between your RB8's users. See "Communicating within RB8."

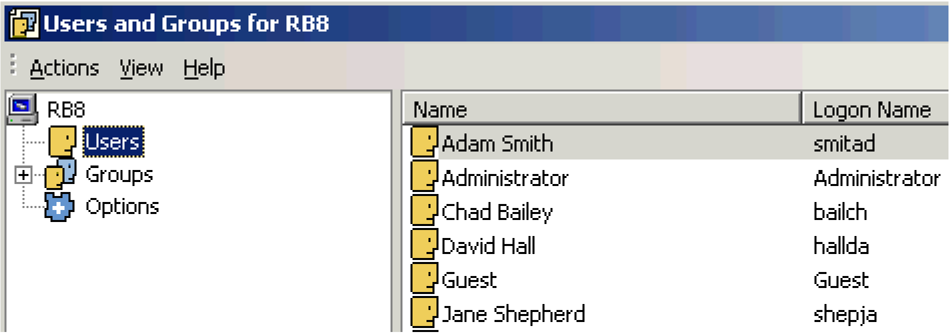
Users and Groups

Creating user accounts

Set up user accounts for everyone who needs to access RB8 and assign them to security groups that give them permissions to only the actions they need to perform. Individual users can be members of multiple security groups, so if you have employees whose responsibilities overlap different areas, such as someone who oversees both calendaring and billing, you can give that person access to both areas through membership in different security groups.

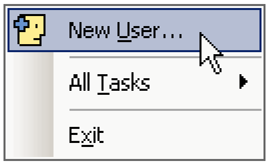
1. On the menu bar in RB8, click **Tools** > **Users and Groups.**

2. On the left side of the Users and Groups window, icons appear representing the main categories. Click **Users** to display the two built-in user accounts, Administrator and Guest, as well as any user accounts you have created so far in the Results pane.

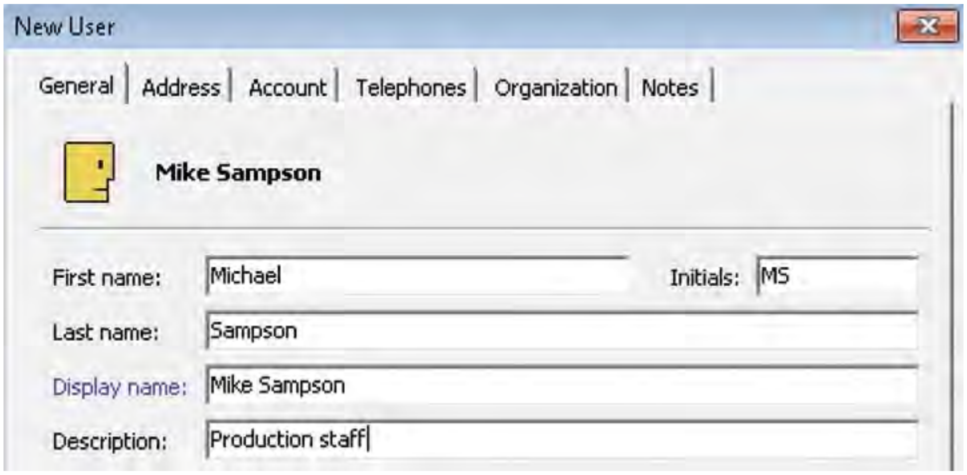


Name	Logon Name
Adam Smith	smitad
Administrator	Administrator
Chad Bailey	bailch
David Hall	hallda
Guest	Guest
Jane Shepherd	shepja

3. Click **Actions** (or right-click **Users),** then choose **New User.**



4. In the New User window, enter the name of the user as you want it to appear in RB8 in the **Display name** field. Other fields are optional.



Mike Sampson

First name: Michael

Initials: MS

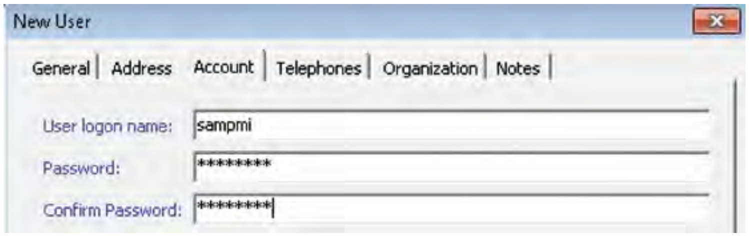
Last name: Sampson

Display name: Mike Sampson

Description: Production staff

5. Click the **Account** tab and enter the **User logon name.** To be consistent, we recommend that you use the first four letters of the last name plus the first two letters of the first name.

6. In **Password** and **Confirm password,** type a *strong* password containing up to 14 characters. (See Best Practices below.)



User logon name: sampmi
Password: ********
Confirm Password: *********

7. Click **OK.**

BEST PRACTICES

For a password to be strong, it should:

- Be at least seven characters long.
- Contain letters, numbers and symbols.
- Have at least one symbol character in the second through sixth positions.
- Not contain your name or user name.
- Not be a common word or name.

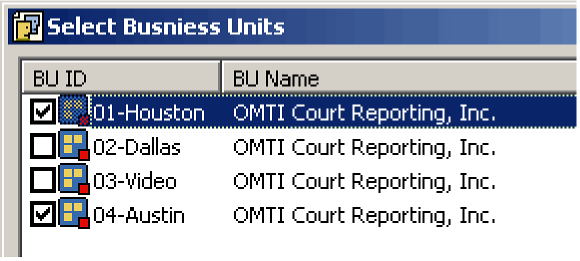
8. Double-click the user account you've just created. Two new tabs – **Member Of** and **BU** – appear.

9. Click the **Member Of** tab, then click **Add.**

10. In the Select Groups window, check all of the security, message and alert groups this user should be a member of, then click **OK.**

11. Click the **BU** (Business Units) tab, then click **Add.**

12. In the Select Business Units window, check all of the business units (revenue centers) this user should have access to, then click **OK.**



Select Busniess Units

BU ID	BU Name
☑ 01-Houston	OMTI Court Reporting, Inc.
☐ 02-Dallas	OMTI Court Reporting, Inc.
☐ 03-Video	OMTI Court Reporting, Inc.
☑ 04-Austin	OMTI Court Reporting, Inc.

BEST PRACTICES

Members of the Administrators group have full access rights and permissions, so you will want to limit the number of users in that group.

After setting up your user accounts, disable the Guest account. To do this, right-click **Guest** in the Results pane, then click **Disable Account.**

TIP

If RB8 does not allow you to delete a user account because it has records attached to it, disable the user account instead. Deleted or disabled user accounts do not appear in the Select Users window when you are adding new users to a group.

User Preferences

Configuring your workstation

Before using RB8, configure your workstation and set your custom defaults. Preferences entered here apply to your workstation only. They do not affect any other computers you might be connected to.

1. On the menu bar in RB8, click **Personal** > **User Preferences.**

2. In the User Preferences window, click the **Log On** tab and specify the following information:
    - **Server –** The name (or the IP address) of the server on which the RB8 Server is installed.
    - **Network Libraries –** The network protocol used to connect to the RB8 Server. TCP/IP is the default. A network protocol is the language your computer uses when communicating over the network.

3. Click the **Message Center** tab to specify your Message Center preferences, such as message format and whether to save copies of outgoing or deleted messages. See “Communicating within RB8.”

4. Click the **Reports** tab to specify the business unit to show on report headers.

5. Click the **Email** tab to specify the protocol you use to send emails out. SMTP is strongly recommended.

6. Click the **Business Unit** tab to specify the default business unit. This is used mainly in entering new jobs. (See “Business Units.”)

7. Click the **Printers** tab. Select a printer to be used for printing each item in its drop-down. If left blank, the default printer defined in *Windows* on your workstation is used.

8. Click the **Database** tab. Specify how long to wait (in seconds) before RB8 terminates queries issued to the SQL Server. The default is 30 seconds.

TIP

If you get time-out messages when running reports in RB8, increase this wait time by selecting a higher number in the **Command Timeout** drop-down on the **Database** tab.

9. Click the **Spell Checker** tab to specify your spelling check preferences.

10. Click the **Invoice** tab and select an invoice template in the drop-down.

11. Click the **Statement** tab and select a statement template in the drop-down.

12. If your company uses RB8’s default fax server instead of an internet fax service like eFax.com, click the **Fax** tab to enter an IP address for the fax server.

13. Skip the **SMS** tab unless you want to specify settings for text message delivery receipt.

14. Click the **Firms** tab to enter the default settings for new firms.

15. Click the **Resources** tab to enter the default settings for new resources.

16. Click the **Jobs** tab and specify the following information:
    - **Default Settings for new jobs** – Default time zone, city and state.
    - **Default Settings for Calendar Manager** – The initial job calendar view and which job statuses will be the default selection(s) in the Search Criteria pane when opening the Calendar Manager.

17. Click the **Clipboard** tab to enter the maximum clipboard count. RB8's clipboard allows copying an entity from a data grid in one window and pasting to the same type of entity's lookup field in another window. You can select to have up to 10 clipboards at a time.

18. Click **OK.**

System Preferences

Configuring global options

System Preferences is where members of the RB8 Administrator security group set options for your company's RB8 system. It contains all of the preference settings that affect all RB8 system users.

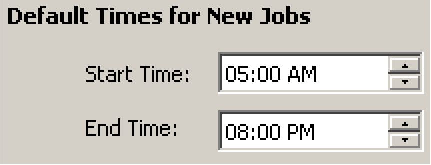
1. On the menu bar in RB8, click **Tools** > **System Preferences.**

2. In the System Preferences window, click the **Job Status** tab and specify a color for each job status.

3. Click the **Job Settings** tab and specify the following information:
    - **Default Times for New Jobs** – Enter default beginning and ending job times. (See Important below.)
    - **Starting Job Number** – Enter a starting job number.
    - **Show assigned resources on Calendar Manager** – Check this box if you want to see the assigned resource names for each job.
    - **Weekly View** – Select in the drop-down what you want displayed in job entries in this tab. The default is the case name.

IMPORTANT

Do not enter a common **Start Time** such as 9:00 AM as the default. Instead, enter an unusual time such as 5:00 AM as the default start time. That way, any jobs that your calendar department entered without setting the actual starting time will stand out like a sore thumb when you run the Daily Calendar Audit report.



Start Time: 05:00 AM

End Time: 08:00 PM

NOTE

When defining a **Starting Job Number,** be aware that job numbers can only increase as jobs are set. You cannot at a later time re-set the starting job number lower.

4. Skip the **SMS Server** tab. SMS text messaging is automatically set up in RB8, so you do not have to fill out these fields.

5. Click the **Confirmation Email** tab and specify the following information:
   - **Embed Job Confirmation form as email body** – Check this box to embed the form in the email in addition to attaching it as a separate file.
   - **Subject –** Enter text that will appear in the Subject line when you send confirmation of scheduling via email. Click **Actions** to insert merge fields into the text.
   - **Message –** Enter text that will appear in the Message box when you send confirmation of scheduling via email. Click **Actions** to insert merge fields into the text. (If you check the **Email Job Confirmation form as email body** box, this field will be grayed out, and any text you previously entered here will be deleted.)

6. Click the **Cancellation Email** tab and specify the following information:
   - **Embed Job Cancellation form as email body** – Check this box to embed the form in the email in addition to attaching it as a separate file.
   - **Subject –** Enter text and select merge fields that will appear in the Subject line when you send confirmation of cancellation via email.
   - **Message –** Enter text and select merge fields that will appear in the Message box when you send confirmation of cancellation via email. (If you check the **Email Job Cancellation form as email body** box, this field will be grayed out, and any text you previously entered here will be deleted.)

7. Click the **Worksheet Email** tab and specify the following information:
   - **Embed Resource Worksheet form as email body** – Check this box to embed the form in the email in addition to attaching it as a separate file.
   - **Subject –** Enter text and select merge fields that will appear in the Subject line when you send assignment notification via email.
   - **Message –** Enter text and select merge fields that will appear in the Message box when you send assignment notification via email. (If you check the **Email Resource Workshet form as email body** box, this field will be grayed out, and any text you previously entered here will be deleted.)
   - **Attachment File Type** – Specify which file types will be attached automatically when emailing resource worksheets (such as notices and exhibits that come directly to the office) by clicking **Add/Remove.** Check all the allowable file types in the Add File Type grid, then click **Save and Close.** (If you have checked the **Embed Resource Worksheet form as email body** box, these files will also appear in the message body.)
   - **Worksheet SMS Message Setting –** Enter the text message and select merge fields that will be sent to resources' mobile phones when you send assignment notifications via SMS.

TIP

If you embed confirmation, cancellation, and/or worksheet forms into emails, your clients and resources do not have to download and open attachments to read them. And if you insert text and data fields in the Subject line that include the most important information about the emails, your clients and resources will not have to open the email to get the gist of it.

IMPORTANT

If you embed confirmation, cancellation, and/or worksheet forms into emails, your company logo or any other images in the forms may not appear in the document the recipient sees. To make images visible to recipients of embedded files, you must link the images to the form(s) used. See "Adding linked images."

8. Click the **Invoice** tab and specify the following information:
    - **Invoice Options –** Check the appropriate boxes. We recommend that you keep **Always check Archive option** checked so that invoices are automatically archived to your RB8 central repository. **Printer in toner save mode** turns off the gray background when invoices are printed.
    - **Subject –** Enter text and select merge fields that will appear in the Subject line when you send invoices via email.
    - **Message –** Enter text and select merge fields that will appear in the Message box when you send invoices via email.
    - **Starting Invoice No. –** Enter a starting invoice number. We recommend that you keep the job number and invoice number far enough apart so that they will never overlap. Like job numbers, invoice numbers can only increase as invoices are created. You cannot at a later time re-set the starting invoice number lower.

9. Click the **Payable** tab. In the **Wait Type** drop-down, select:
    - **Hard Wait** – If you wait a fixed number of days, regardless of whether you receive payment from clients, to pay reporters.
    - **Soft Wait** – For any other payment method.

10. Click the **Statement** tab and specify the following information:
    - **Statement Options –** Check the appropriate boxes. **Printer in toner save mode** turns off the gray background when statements are printed.
    - **Subject –** Enter text and select merge fields that will appear in the Subject line when you send statements via email.
    - **Message –** Enter text and select merge fields that will appear in the Message box when you send statements via email.

11. Click the **NACHA** tab to enter information that is required for direct deposit. Contact your bank to obtain this information and arrange the direct deposit, then contact RB Support for help filling out this tab.

12. Click the **Message Center** tab to specify the number of days the unread, sent and deleted messages will be kept. See “Communicating within RB8.”

13. Click the **Repository Server** tab to specify the IP address of the computer where RB8’s repository is located. To log and track all file download activities (required by HIPPA rules) performed by in-house staff as well as by clients, check **Log internal usage of repository files.**

14. If you have the RB8 Reward Points plug-in, click the **Points System** tab. Contact RB Support for help filling out this tab.

15. Click the **Time Zone** tab to specify the active time zones for your company. Right-click any time zone (including international time zones) your company sets jobs in, then choose **Set Active.** If a time zone is no longer needed, right-click it, then choose **Clear Active.**

16. When you send a confirmation email to a client, you can have RB8 attach an *iCalendar* file that can be imported into *Outlook’s* calendar, among other programs. Click the **Confirmation iCalendar** tab and specify the following information:
    - **Subject** – Enter text and select merge fields that will appear in the Subject line when the client imports the attached *iCalendar* file.
    - **Description** – Enter text and select merge fields that will appear in the Description box.

17. When you send an assignment email to a resource, you can have RB8 attach an *iCalendar* file that can be imported into *Outlook's* calendar, among other programs. Click the **Worksheet iCalendar** tab and specify the following information:
    - **Subject** – Enter text and select merge fields that will appear in the Subject line when the resource imports the attached *iCalendar* file.
    - **Description** – Enter text and select merge fields that will appear in the Description box.

18. For emergency job requests from clients, you can send urgent alert emails and SMS text messages to a group of resources at once asking for the first available resource to take the job. Click the **Resource Blast** tab and specify the following information:
    - **Subject** – Enter text and select merge fields that will appear in the Subject line when you send resource blasts via email.
    - **Message** – Enter text and select merge fields that will appear in the Message box when you send resource blasts via email.
    - **Blast SMS Message Setting** – Enter the text message that will be sent to resources' mobile phones when you send resource blasts via SMS. Click **Actions** to insert merge fields into the text.

19. To save time when emailing resources their pay information, you can automatically send them with the **Send Payroll Report** function. To set up the email template, click the **Payroll Report Email** tab and specify the following information:
    - **Subject** – Enter text and select merge fields that will appear in the Subject line when you send resources their payroll report via email.
    - **Message** – Enter text and select merge fields that will appear in the Message box when you send resources their payroll report via email.

20. Click the **Fax** tab. Under Faxing Method, choose:
    - **OMTI Fax Server** – RB8's default internal fax server.
    - **Online (Internet) Fax Service** – If you contract with an online fax service provider, select the service in the drop-down list, then enter the settings you received from them when you signed up.

21. Click the **Others** tab to specify whether you want to omit a comma after the city name in displaying all addresses.

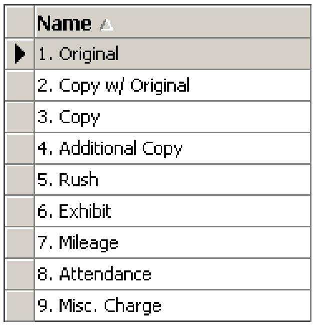
22. Click **OK.**

Service Items Master

Regular charges that you bill to your clients are called *Service Items* in RB8. Service items are listed on your invoices to provide itemized details for your clients and third-party payers. In-house, they provide information to help you analyze your revenue streams.

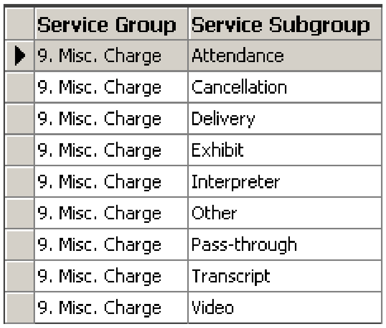
To speed the billing process and help you analyze your billable charges afterwards, RB8 organizes service items into a set of categories, called the *Service Items Master List,* which you can amend and organize to fit your business needs.

RB8 Service Groups: The main categories in the Service Items Master List, called *Service Groups,* are the most commonly used billable items for court reporters. These main categories are preset by the system and cannot be modified by the user.



Name
1. Original
2. Copy w/ Original
3. Copy
4. Additional Copy
5. Rush
6. Exhibit
7. Mileage
8. Attendance
9. Misc. Charge

Service Subgroups: Add the rest of your billable charges to the **Misc. Charge** Service Group (see “Adding service items”), where you can group them into *Service Subgroups.* Then, when billing, you can locate individual items quickly in their subgroups, instead of scrolling through a long, undifferentiated list of all of your miscellaneous services. RB8 comes with a default list of subgroups.



Service Group	Service Subgroup
9. Misc. Charge	Attendance
9. Misc. Charge	Cancellation
9. Misc. Charge	Delivery
9. Misc. Charge	Exhibit
9. Misc. Charge	Interpreter
9. Misc. Charge	Other
9. Misc. Charge	Pass-through
9. Misc. Charge	Transcript
9. Misc. Charge	Video

Service Items Master

Adding service items

With the Service Items Master List, you define your firm’s services for clients, resources and staff to select from drop-down lists in RB8 and RB Web. Instead of longhand requests from clients or inconsistent descriptions in billing rate tables, service item descriptions are consistent throughout your system. Each billing rate table and online order form derives its service items list from this master template.

Include all of the services that you bill clients for in this list.

1. On the menu bar in RB8, click **Setup** > **Service Items Master.**

2. Click **Actions** (or right-click on the grid), then choose **New.**

3. In the New Service Item window, enter the following information:

   - **Service Subgroup –** Select an appropriate subgroup in the drop-down. (See "Organizing service items.")
   - **Service Item (required) –** Type the description to appear on invoices. The maximum length of this field is 128 characters.
   - **Unit Type** – Select the category in the drop-down for the billable units of this service item. RB8 prints the unit type on detailed invoices next to the number of units.
   - **Account No.** – Select an appropriate (revenue) account in the drop-down.
   - **Billing Rate –** Enter the default amount you charge per unit. If you bill different rates for different clients, leave this field blank and enter the actual rate in each billing rate table. (See "Setting up billing rates.")
   - **Pay Rate Type –** Specify whether you pay resources a flat amount ($) or a percentage of what's billed (%) for this service item.
   - **Pay Rate –** Enter the default amount (or percentage) you pay per unit. If you pay different rates for different resources, leave this field blank and enter the actual rate in each pay rate table. (See "Setting up pay rates.")
   - **Minimum Billing –** Enter the default minimum billing amount, if applicable. If you bill different minimums for different clients, leave this field blank and enter the actual minimum in each billing rate table.
   - **Minimum Pay –** Enter the default minimum pay amount, if applicable. If you pay different minimums for different resources, leave this field blank and enter the actual minimum in each pay rate table.
   - **Billing Rush Applicable –** Check this box if the Billing Rate increases when an order containing this service item is expedited. Generally this box is not checked.
   - **Pay Rush Applicable –** Check this box if the Pay Rate increases when an order containing this service item is expedited. Generally this box is not checked.
   - **Court Taxable –** Check this box if the service item is a taxable court cost. (Generally, taxable court costs are awarded to the winning side in a lawsuit and are intended to defray the legal expenses of the successful litigant. Used in Texas only.)
   - **Sales Taxable –** Check this box if the service item is sales taxable.
   - **Discountable –** If you provide negotiated discounts for certain clients, check this box if the service item is discountable.
   - **Pointable** – If you have the RB8 Reward Points plug-in, check this box if the service item is worth points.
   - **Client Of Commissionable –** If you pay incentive commissions to resources who bring in their own clients, check this box if the service item is commissionable.
   - **Sales Rep Commissionable –** If you have sales representatives (account executives), check this box if the service item is commissionable.
   - **Show text on invoices –** Check this box to print the **Service Item Name** when an invoice is printed with "no details." If invoices are printed with details, this checkbox is ignored.
   - **Show amount on invoices –** Check this box to print the amount when an invoice is printed with "no details." If invoices are printed with details, this checkbox is ignored.
   - **Show on Online Orders (RBWeb)** – Check this box to make the service item available for clients to request when they are scheduling online using RB Web.
   - **Show on Turn-in (RBWeb) –** Check this box to make the service item available for resources to select when they are turning jobs in online using RB Web.
   - **Show on Production Sheets –** Check this box to show the service item on production sheets. Leave blank if this item does not concern the production department.
   - **LEDES 1998B** – If you have clients who require that invoices be submitted electronically (e-billing), see "Electronic Billing" for more information.

4. Click **Save and Close.**

BEST PRACTICES

Spend some time coming up with appropriate names for service items. Consolidate similar items to simplify the list. Remember, this list is not just for your billing person. It will affect your clients and reporters as they use RB Web. And it will be used by the calendar department and production staff. Plus, many reports in RB8 use this list to analyze the revenue stream for you.

Here is an example of the good versus the ugly in service item names:

The Ugly	The Good
Courier	Delivery
DHL FedEx Federal Express Overnight Hand Delivery Postage UPS UPS Red	Overnight Delivery

NOTE

If you decide to re-organize and want to remove a service item, but keep its data, right-click the service item, then choose **Merge To.** In the Merge To window, click the service item you want to add the removed service item's historical data to. In the RB8 pop-up window, click **Yes.** Merging only works with service items in the Misc. Charge group.

Service Items Subgroups

Organizing service items

To make finding a particular service item quicker, set up service items subgroups, then arrange your company's billable services into these subgroups. RB8 comes with a default set of service items subgroups. You can add, delete or modify service items subgroups.

1. To amend service subgroups, click **Setup** > **Service Items Subgroups.**
2. Click **Actions** (or right-click on the grid), then choose **New.**
3. **Service Group** and **Service Subgroup No.** are set by RB8 and not editable. Enter a name in **Service Subgroup Name.**
4. Click **Save and Close.**

BEST PRACTICES

As your firm expands into other business areas, you will add more service items to the master list. It is not uncommon to end up with hundreds of service items. Organizing related service items into well-designed subgroups will help you find a particular service item quickly without scrolling up and down a long list.

Sample Service Items Master List

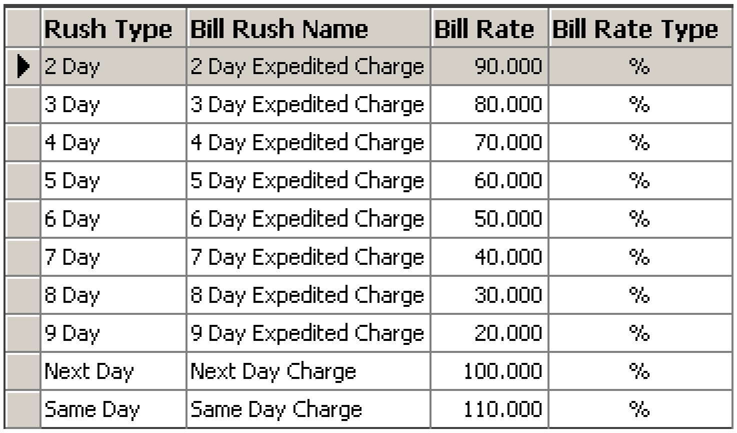
Service Group	Service Subgroup	Service Item
9. Misc. Charge	Attendance	After 5PM Attendance
		Before 8AM Attendance
		Saturday/Sunday/Holiday Attendance
		Travel Time
		Waiting Time
		...
9. Misc. Charge	Delivery	Delivery
		Overnight Delivery
		...
9. Misc. Charge	Pass-through	Airfare
		Lodging
		Parking/Toll
		...
9. Misc. Charge	Production	ASCII
		Color Copies
		Condensed Transcript
		Email Transcript
		Tabs
		Word Index
		...
9. Misc. Charge	Realtime	Realtime Setup
		Rough Draft
		...
9. Misc. Charge	Video	Tape Copies
		Videographer Attendance-First Hour
		Videographer Attendance-Additional Hours
		...

Rush Type Master

The *Rush Type Master* lists all of the different expedited (rush) deliveries you provide along with their default billing and pay information. It drastically reduces the number of billing rate tables a typical court reporting firm needs by offering more rush charge choices. (See “Setting up billing rates.”)

A rush type can increase the base (no rush) rate either by a percentage or flat amount. Rush types and amounts for billing clients can be different from those for paying resources.

Rush Type Master example



	Rush Type	Bill Rush Name	Bill Rate	Bill Rate Type
▶	2 Day	2 Day Expedited Charge	90.000	%
	3 Day	3 Day Expedited Charge	80.000	%
	4 Day	4 Day Expedited Charge	70.000	%
	5 Day	5 Day Expedited Charge	60.000	%
	6 Day	6 Day Expedited Charge	50.000	%
	7 Day	7 Day Expedited Charge	40.000	%
	8 Day	8 Day Expedited Charge	30.000	%
	9 Day	9 Day Expedited Charge	20.000	%
	Next Day	Next Day Charge	100.000	%
	Same Day	Same Day Charge	110.000	%

Rush Type Master

Adding rush charge types

Set up your Rush Type Master list of rush charges before setting up your billing rate tables.

1. On the menu bar in RB8, click **Setup** > **Rush Type Master.**

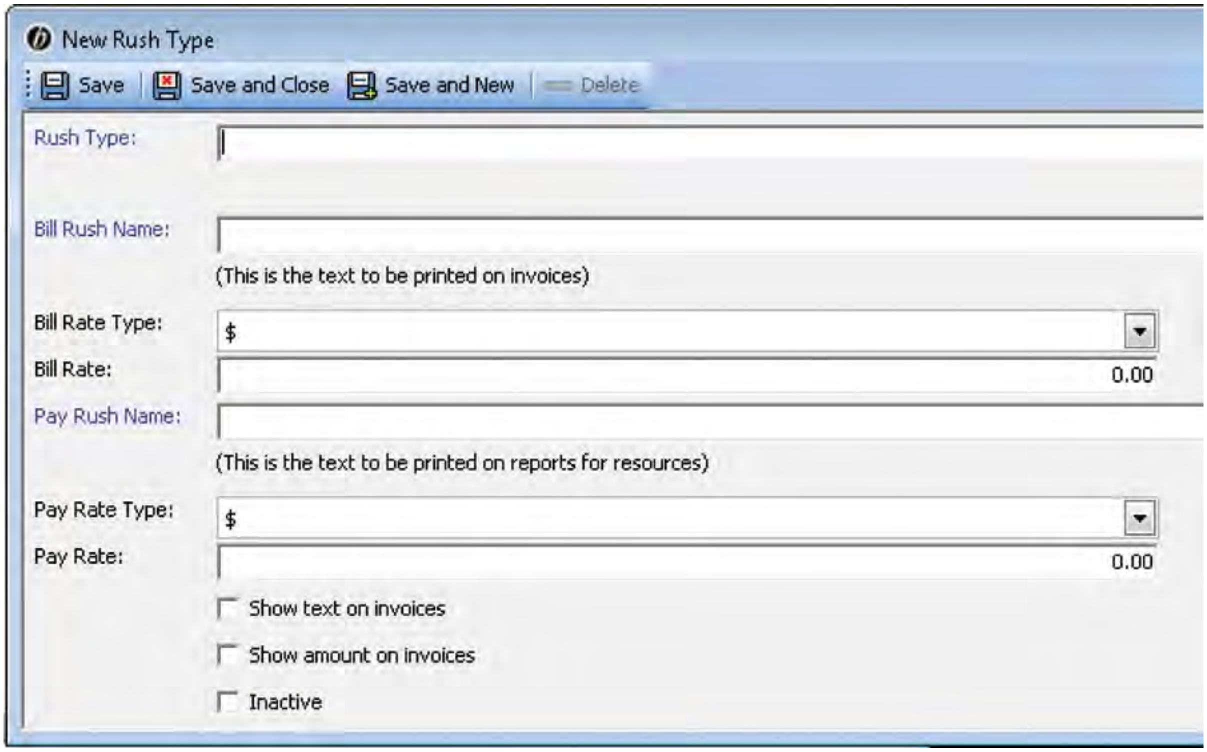
2. Click **Actions** (or right-click on the grid), then choose **New.**

3. In the New Rush Type window, enter the following information:
   - **Rush Type (required) –** Enter a short notation to be displayed in the drop-down.
   - **Bill Rush Name (required) –** Enter a description to be printed on invoices.
   - **Bill Rate Type –** Specify whether the base billing rate is increased by a flat amount ($) or a percentage (%).
   - **Bill Rate –** Enter the default amount or percentage by which the base billing rate is increased, unless it varies for each billing rate group, then leave as zero (0).
   - **Pay Rush Name (required) –** Enter a description to be printed on resource pay reports.
   - **Pay Rate Type –** Specify whether the base pay rate is increased by a flat amount ($) or a percentage (%).
   - **Pay Rate –** Enter the default amount or percentage by which the base pay rate is increased, unless it varies for each billing rate group, then leave as zero (0).

NOTE

If using a flat amount for **Bill Rate** or **Pay Rate,** enter the expedite portion only of each rush charge (the difference between your O&1 base rate and the rush charge’s total expedite amount). When billing, RB8 calculates the rush charge amount by adding the expedite amount entered in these fields to the O&1 base rate.

- **Show text on invoices –** Check this box to print the **Bill Rush Name** when an invoice is printed with "no details."
- **Show amount on invoices –** Check this box to print the amount when an invoice is printed with "no details."



Rush Type:

Bill Rush Name:

(This is the text to be printed on invoices)

Bill Rate Type: $

Bill Rate: 0.00

Pay Rush Name:

(This is the text to be printed on reports for resources)

Pay Rate Type: $

Pay Rate: 0.00

☐ Show text on invoices

☐ Show amount on invoices

☐ Inactive

4. Click **Save and Close.**

BEST PRACTICES

Set up your Rush Type Master before setting up individual billing and pay rate tables. That way, your default rush rates from this master template automatically fill in when you create an individual rate table. You can override rush defaults in individual rate tables to accommodate any special pricing or pay arrangements that should be included in a particular rate table.

Billing Rates & Billing Rate Groups

It is not uncommon to have more than 100 billing rate tables in your RB8 system to accommodate your different clients' needs and third-party requirements. To minimize the time it takes to locate a particular rate table when billing, group your rate tables into logical units. Then, when billing, you only have to scroll through the rate tables in one of these smaller groups instead of your entire list of rate tables.

The structure for grouping billing rate tables in RB8 is called the *Billing Rate Group.* RB8 comes with one billing rate group, called "Standard." Rates charged to your average clients (known as *rack rates)* should be included in rate tables attached to the Standard Billing Rate Group.

After setting up your Service Items Master and Rush Type Master, then set up Billing Rate Groups and create their related billing rate tables (see "Setting up billing rates"). You connect the billing rates to firms in the firm set-up (see "Setting up firms"). You can set up individual billing rate groups for different tiers of clients (such as your preferred clients), a particular firm, contact or case.

Billing Rate Group examples

Preferred Level 1
State Farm Insurance
Microsoft
Preferred Level 2
Kirkland & Ellis

Billing Rate Group

Adding billing rate groups

If you have a client (or case) that requires special pricing, create a new billing rate group first using RB8's Code Manager (see "Code Manager"). Then connect the client (or case) to that billing rate group.

1. Click **Tools** > **Code Manager** > **Accounting** > **Billing Rate Group.**
2. Click **Actions** > **New,** enter a name for the group, then click **Save and Close.**

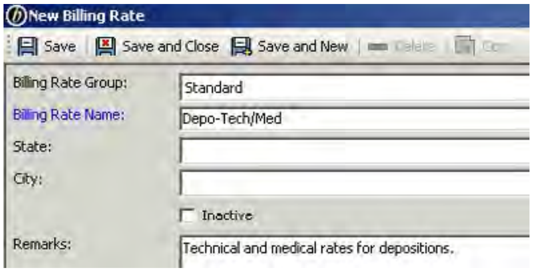
Billing Rates

Setting up billing rates

For each billing rate group, create as many billing rate tables as you need.

1. On the menu bar in RB8, click **Setup** > **Billing Rates.**
2. Click **Actions** (or right-click on the grid), then choose **New.**
3. In the New Billing Rate window, enter the following information:
   - **Billing Rate Group –** Select a billing rate group in the drop-down.
   - **Billing Rate Name (required) –** Enter a description of what the rate table covers. Make the description easy for your billing staff to understand when it should be used.
   - **State –** If you charge different rates for different states, select the state code in the drop-down. Otherwise, leave this field blank.

   City – If you charge different rates for different cities, enter the city name. Otherwise, leave this field blank



Billing Rate Group: Standard
Billing Rate Name: Depo-Tech/Med
State:
City:
☐ Inactive
Remarks: Technical and medical rates for depositions.

4. Click **Save.** Two tabs—**Base Rates** and **Rush Rates**—appear in the lower half of the window.

5. In the **Base Rates** section, all of the service items from the master list are listed. Double-click each service item to make changes.
   - **Original –** Enter the page rate you charge for an original.
   - **Copy w/Original –** Enter the page rate you charge for a copy with an original. (See Note below.)
   - **Copy –** Enter the page rate you charge for a copy without an original. This is the full copy rate for opposing counsels.
   - **Additional Copy –** Enter the page rate you charge for an additional copy without an original. It is customary to charge one half of the first full copy rate.
   - **Exhibit –** Enter the page rate you charge for (black and white) exhibits.
   - **Mileage –** Enter the mileage rate you charge.
   - **Certification of Non-Appearance –** Enter the amount you charge for a certificate of non-appearance or an affidavit.
   - **Full Day Per Diem –** Enter the amount you charge for resource attendance for a full day.
   - **Half Day Per Diem –** Enter the amount you charge for resource attendance for a half day.
   - **Hourly –** Enter the hourly rate you charge for resource attendance.
   - **Late Cancellation –** Enter the amount you charge for a late cancellation or "bust."
   - **Not Transcribed –** Enter the amount you charge for resource attendance when a job is "on hold" or not transcribed. If you charge a regular page rate based on half the number of the estimated pages, leave this field blank.
   - **Misc. Charges –** Enter the amount you charge for each miscellaneous service item.

6. In the **Rush Rates** section, all of the rush items from the master list are listed. Double-click each rush item to make changes if rates are different from the master list.

7. Click **Save and Close.**

NOTE

To help you figure the amounts to enter in **Original** and **Copy w/ Original,** substitute your own fees in the following example: If you charge $4.00 for an O&1, how much do you charge the O&1 client for an extra copy? It is customary to charge one half of the first copy rate. In that case, if your first copy rate is $2.00, enter $1.00 in **Copy w/Original** and $3.00 ($4.00 – $1.00) in **Original.**

TIP

A quick way to add more billing rate tables is to copy (replicate) an existing table:

1. On the billing rate table list, right-click a billing rate table to copy from, then choose **Copy.**
2. Modify only those fields that are different, including the billing rate name. Then click **Save and Close.**

Sample of Billing Rates

Billing Rate Group	Billing Rate Name
DOJ	Deposition
	Hearing
	...
Preferred	Arbitration
	Court
	Depo-Regular
	Depo-Tech/Med
	Depo-Telephonic
	Depo-Videotaped
	Hearing
	Workers Comp
	...
Standard	Arbitration
	Court
	Depo-Regular
	Depo-Tech/Med
	Depo-Telephonic
	Depo-Videotaped
	Hearing
	Workers Comp
	...
State Farm	Deposition
	Workers Comp
	...

Pay Rate Groups

RB8 has a structure for grouping related pay rate tables similar to Billing Rate Groups. (See “Billing Rate Groups.”) *Pay Rate Groups* make running payroll easier because they automatically fill in resources’ pay depending on which group they belong to. A resource must be connected to a pay rate group.

Set up pay rate groups based on how you classify resources for payment purposes. For example, if you use a tiered system with different pay scales for different levels of experience and credentials, or if you pay different resources different percentages of billable items, create groups based on those classifications. Each pay rate group can have an unlimited number of pay rate tables.

Pay Rate Group examples

RealTime
70%
Partners
RealTime-Senior
Level 1
ABC Court Reporting (affiliate)

Pay Rates

Creating pay rate groups

Resources must be connected to a pay rate group, so set up different groups to cover all of your different pay categories of resources using RB8’s Code Manager (see “Code Manager.”).

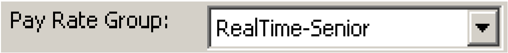
1. Click **Tools > Code Manager > Accounting > Pay Rate Group.**
2. Click **Actions** > **New,** enter a name for the group in **Code Name,** then **click Save and Close.**

Pay Rates

Connecting pay rates with resources

After creating a pay rate group, attach resources to the group.

1. In the Resources window, right-click the resource you want to attach to a pay rate group, then choose **View** (or double-click it).
2. In the View Resource window, click the **Pay Info** tab.
3. Select the pay rate group in the **Pay Rate Group** drop-down.



Pay Rate Group: RealTime-Senior

TIP

If you pay a resource at different rates for different jobs, select the **Pay Rate Group** for that resource based on which rate they are paid most often. You can override it at billing for those instances when you pay them at a different rate.

Pay Rates

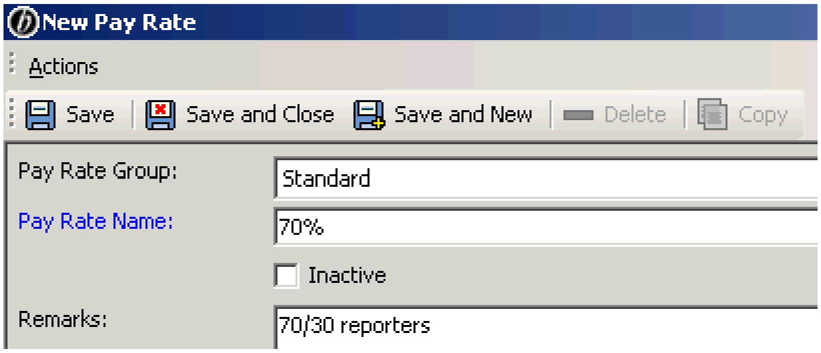
Setting up pay rates

For each pay rate group, create as many pay rate tables as you need.

1. On the menu bar in RB8, click **Setup** > **Pay Rates.**

2. Click **Actions** (or right-click on the grid), then choose **New.**

3. In the New Pay Rate window, enter the following information:
   - **Pay Rate Group –** Select a pay rate group in the drop-down.
   - **Pay Rate Name (required) –** Enter a description of what the rate table covers. Make the description easy for your billing staff to understand when it should be used.



Pay Rate Group: Standard
Pay Rate Name: 70%
☐ Inactive
Remarks: 70/30 reporters

4. Click **Save.** Two tabs—**Base Rates** and **Rush Rates**—appear in the lower half of the window.

5. In the **Base Rates** section, all of the service items from the master list are listed. Double-click each service item to make changes.
   - **Pay Rate Type –** Specify whether you pay by a flat amount ($) or a percentage (%).
   - **Pay Rate –** Enter the amount (or percentage) of the pay.
   - **Minimum Pay –** Enter the minimum pay amount, if applicable.
   - **Pay Rush Applicable –** Check this box if the pay rate increases when an order containing this service item is expedited.

6. In the **Rush Rates** section, all of the rush items from the master list are listed. Double-click each rush item to make changes if rates are different from the master list.

7. Click **Save and Close.**

TIP

A quick way to add more pay rate tables is to copy (replicate) an existing table:

1. On the pay rate table list, right-click a pay rate table to copy from, then choose **Copy.**
2. Modify only those fields that are different, including the pay rate name. Then click **Save and Close.**

Sample of Pay Rates

Percentage Method

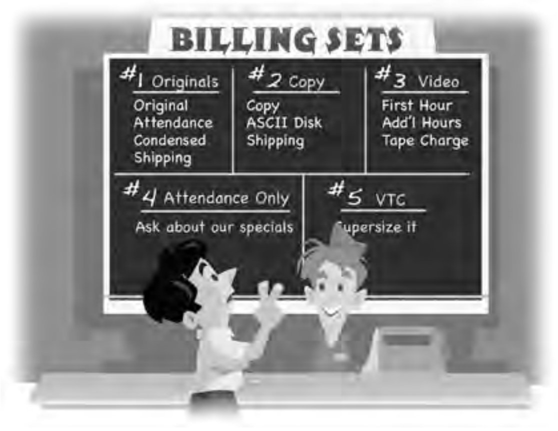
Pay Rate Group	Pay Rate Name
Standard	60%
	62.5%
	65%
	70%
	75%
	80%
	Partner (100%)
	...

Flat Amount Method

Pay Rate Group	Pay Rate Name
Level 1	Arbitration
	Court
	Depo-Regular
	Depo-Tech/Med
	Depo-Videotaped
	Hearing
	...
Level 2	Arbitration
	Court
	Depo-Regular
	Depo-Tech/Med
	Depo-Videotaped
	Hearing
	...
Level 3	Arbitration
	Court
	Depo-Regular
	Depo-Tech/Med
	Depo-Videotaped
	Hearing
	...

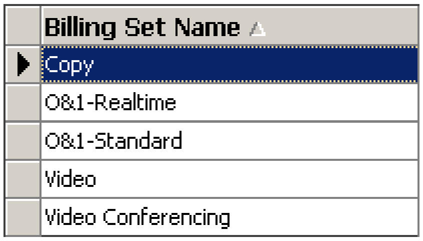
Billing Sets

If you have ever ordered a combo meal at a fast food joint, then you already understand what RB8 *Billing Sets* are: Preset groups of items that speed up the selection process because you only have to choose the set, not all of the individual items. You can include any number of service items in a billing set. Add service items for each attorney automatically by selecting the appropriate billing set in the drop-down.


BILLING SETS
#1 Originals
Original
Attendance
Condensed
Shipping
#2 Copy
Copy
ASCII Disk
Shipping
#3 Video
First Hour
Add'l Hours
Tape Charge
#4 Attendance Only
Ask about our specials
#5 VTC
Supersize it

Billing sets are not tied to billing rate tables. They only contain service items, so the same set can be used for different clients, jobs and resources. You apply the actual billing rates when billing the job.

Billing Set examples



Billing Set Name
Copy
O&1-Realtime
O&1-Standard
Video
Video Conferencing

If your billing staff does not need all of the items in a billing set at the time of billing a particular order, they can deselect any items in the billing set they will not be using for that invoice.

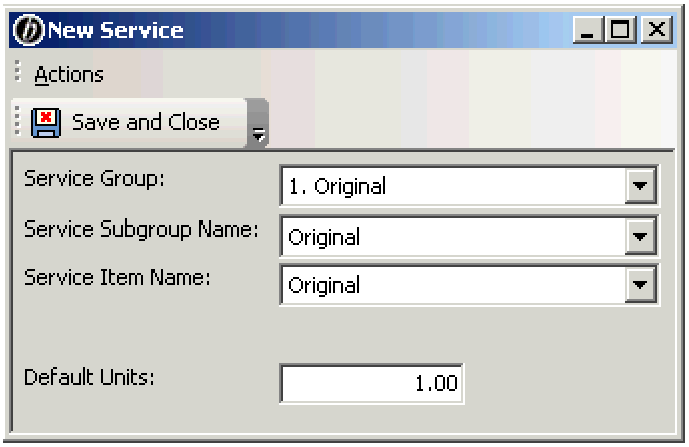
Billing Sets

Creating billing sets

Set up a new billing set anytime you find yourself selecting the same set of services for multiple jobs.

1. On the menu bar in RB8, click **Setup** > **Billing Sets.**
2. Click **Actions** (or right-click on the grid), then choose **New.**
3. In the New Billing Set window, enter a descriptive name in **Billing Set Name (required).** Enter an expanded description under **Remarks.**
4. Click **Save.** An empty grid appears in the lower half of the window.
5. Click **New.**

6. In the New Service window, enter the following information:
   - **Service Group –** Select a service (main) group in the drop-down.
   - **Service Subgroup Name –** Select a service subgroup in the drop-down.
   - **Service Item Name –** Select a service item in the drop-down.
   - **Default Units –** Enter the default number of units.

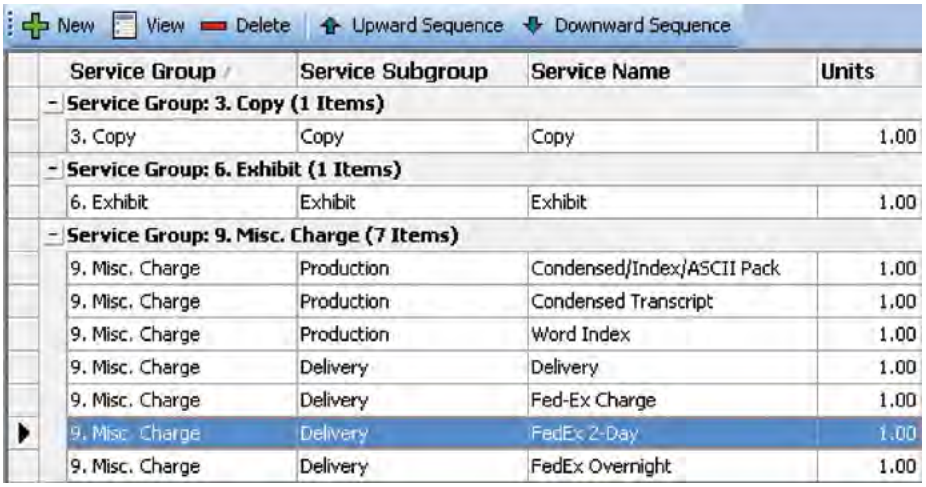


Service Group: 1. Original
Service Subgroup Name: Original
Service Item Name: Original
Default Units: 1.00

7. Click **Save and Close.**

8. Repeat steps 5 through 7 until you have added all of the service items for this billing set.

Sample billing set



Service Group	Service Subgroup	Service Name	Units
Service Group: 3. Copy (1 Items)			
3. Copy	Copy	Copy	1.00
Service Group: 6. Exhibit (1 Items)			
6. Exhibit	Exhibit	Exhibit	1.00
Service Group: 9. Misc. Charge (7 Items)			
9. Misc. Charge	Production	Condensed/Index/ASCII Pack	1.00
9. Misc. Charge	Production	Condensed Transcript	1.00
9. Misc. Charge	Production	Word Index	1.00
9. Misc. Charge	Delivery	Delivery	1.00
9. Misc. Charge	Delivery	Fed-Ex Charge	1.00
9. Misc. Charge	Delivery	FedEx 2-Day	1.00
9. Misc. Charge	Delivery	FedEx Overnight	1.00

9. Click **Save and Close.**

TIPS

A quick way to add more billing sets is to copy (replicate) an existing one:

1. On the billing set list, right-click a billing set to copy from, then choose **Copy.**
2. Modify only those fields that are different, including the billing set name. Then click **Save and Close.**

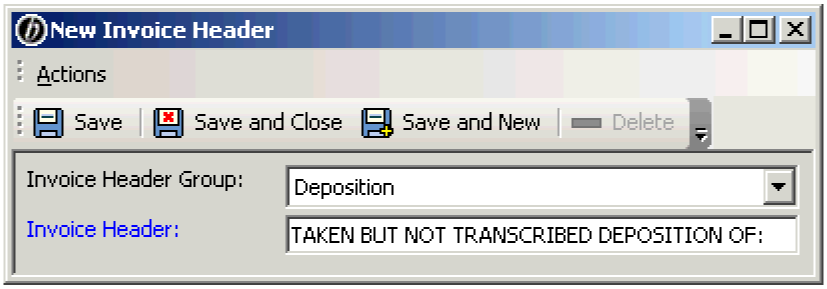
To change the order of items in a service group, highlight an item, then click **Upward Sequence** or **Downward Sequence** to move the item up or down one line in the group. The order of service items in the billing set will be the order of service items on invoices using that billing set.

Invoice Headers

Setting up invoice headers

RB8 automatically generates a standard invoice header for each witness based upon your input. Create your own custom headers for specific circumstances, and organize them into groups to save you time locating one when billing.

1. On the menu bar in RB8, click **Setup** > **Invoice Headers.**
2. Click **Actions** (or right-click on the grid), then choose **New.**
3. In the New Invoice Header window, enter the following information:
   - **Invoice Header Group –** Select an invoice header group in the drop-down. Invoice header groups are defined using Code Manager. (See "Adding drop-down entries.")
   - **Invoice Header (required) –** Enter an invoice header.

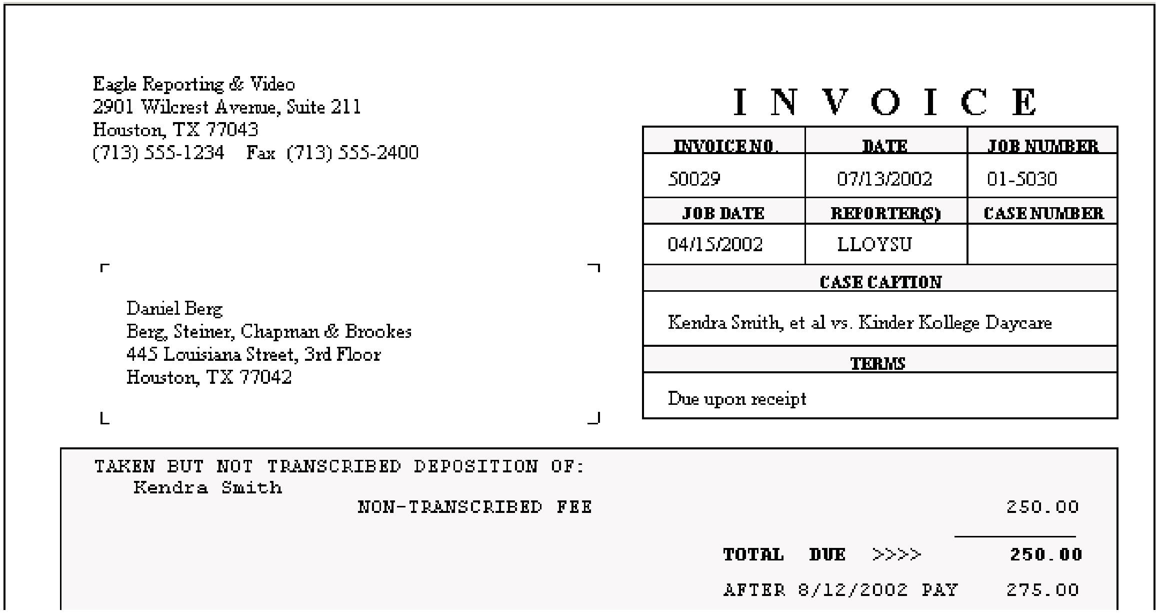


Invoice Header Group: Deposition

Invoice Header: TAKEN BUT NOT TRANSCRIBED DEPOSITION OF:

4. Click **Save and Close.**

USAGE EXAMPLE



Eagle Reporting & Video
2901 Wilcrest Avenue, Suite 211
Houston, TX 77043
(713) 555-1234 Fax (713) 555-2400

Daniel Berg
Berg, Steiner, Chapman & Brookes
445 Louisiana Street, 3rd Floor
Houston, TX 77042

I N V O I C E

INVOICE NO.	DATE	JOB NUMBER
50029	07/13/2002	01-5030
JOB DATE	**REPORTER(S)**	**CASE NUMBER**
04/15/2002	LLOYSU	
CASE CAPTION		
Kendra Smith, et al vs. Kinder Kollege Daycare		
TERMS		
Due upon receipt		

```
TAKEN BUT NOT TRANSCRIBED DEPOSITION OF:
   Kendra Smith
                  NON-TRANSCRIBED FEE                          250.00

                                    TOTAL  DUE  >>>>           250.00
                                    AFTER 8/12/2002 PAY        275.00
```

Invoice Messages

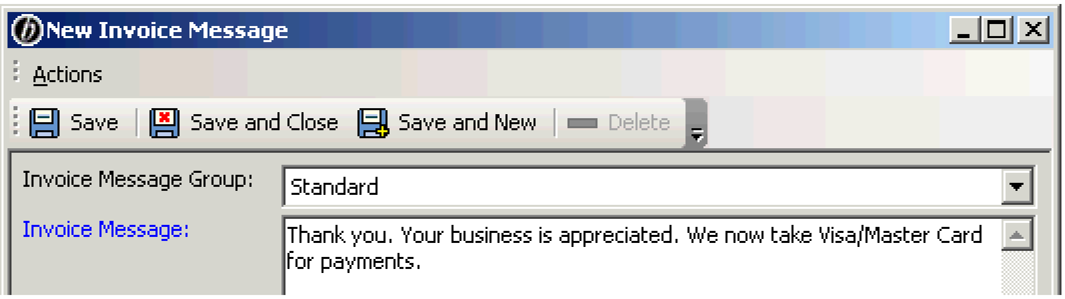
Setting up invoice messages

You can create and group messages in a similar way to invoice headers, which can then be selected and modified on individual invoices.

1. On the menu bar in RB8, click **Setup** > **Invoice Messages.**

2. Click **Actions** (or right-click on the grid), then choose **New.**

3. In the New Invoice Message window, enter the following information:
   - **Invoice Message Group –** Select an invoice message group in the drop-down. Invoice message groups are defined using Code Manager. (See "Adding drop-down entries.")
   - **Set as Default** – Check this box to have this message appear as the default on invoices. You can override the default on individual invoices.
   - **Invoice Message (required) –** Type a message of any length.

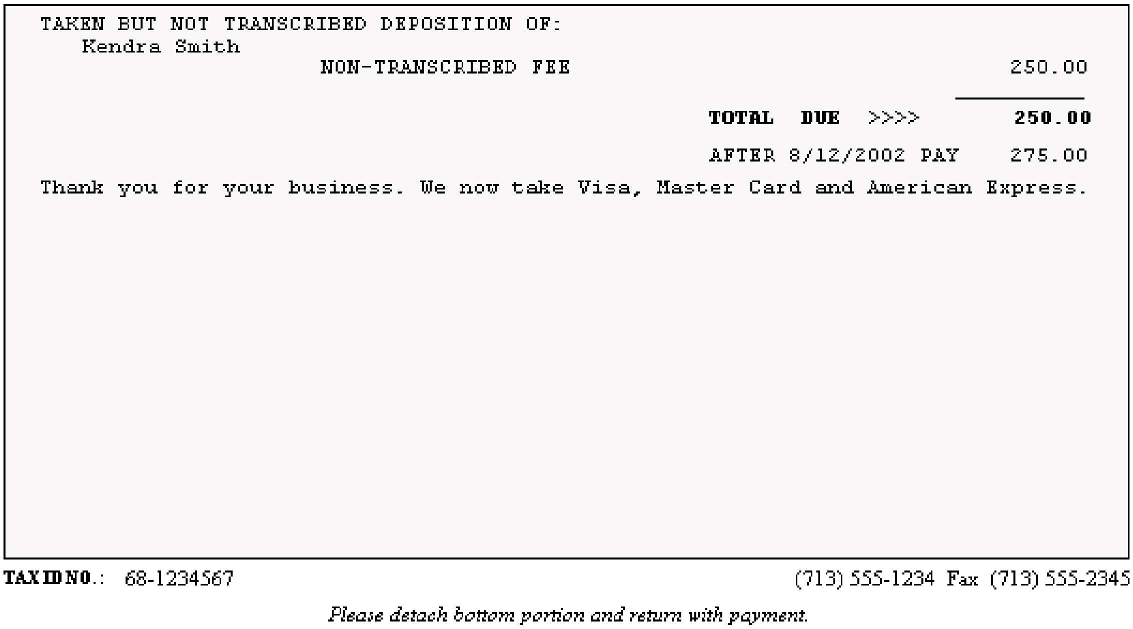


Invoice Message Group: Standard

Invoice Message: Thank you. Your business is appreciated. We now take Visa/Master Card for payments.

4. Click **Save and Close.**

USAGE EXAMPLE



```
 TAKEN BUT NOT TRANSCRIBED DEPOSITION OF:
    Kendra Smith
                      NON-TRANSCRIBED FEE                              250.00
                                                                 ----------
                                              TOTAL  DUE  >>>>        250.00

                                              AFTER 8/12/2002 PAY    275.00
 Thank you for your business. We now take Visa, Master Card and American Express.
```

TAX ID NO.: 68-1234567 (713) 555-1234 Fax (713) 555-2345

Please detach bottom portion and return with payment.

Pay Groups

If resources have different pay dates and cutoff dates, group them according to their pay period (frequency) to reduce errors when running payroll. These *Pay Groups* are unrelated to Pay Rate Groups, which classify resources according to their pay tier. (See "Pay Rate Groups.")

Pay Group examples

Biweekly
Semimonthly
Monthly
Affiliates
Overflows

Pay Group

Creating pay groups

Use RB8's Code Manager (see "Code Manager.") to create pay groups for all of your company's different types of pay periods to streamline processing payroll.

1. Click **Tools** > **Code Manager** > **Resources** > **Pay Group.**
2. Click **Actions** > **New,** enter a name for the group, then click **Save and Close.**

Pay Dates

Setting up pay dates

At the beginning of each year, set up the year's pay dates and their corresponding cutoff dates for each pay group. Doing so drastically reduces the number of payroll errors caused by entering the wrong date when running payroll.

1. On the menu bar in RB8, click **Setup** > **Pay Dates.**
2. Click **Actions** (or right-click on the grid), then choose **New.**
3. In the New Pay Date window, enter the following information:
    - **Pay Date –** Enter a pay date on which this group is paid.
    - **Pay Group –** Select a pay group in the drop-down. (See "Pay Groups.")
    - **Cutoff Date –** Enter a cutoff date, which is the last date for invoices to be included.
    - **1099 Issuing BU –** Select a business unit that will be issuing 1099s (i.e., your main office) in the drop-down.
4. Click **Add** in the Business Units to include section**.**
5. In the Lookup Business Units window, select the business units to include for this payroll. Click **Check All** to select all of them at once.
6. Click **Save and Close** to return to the New Pay Date window.
7. Click **Save and Close.**

Resources

Resources provide your business with a service or support. Reporters, videographers, interpreters, scopists and account executives (sales reps) are examples of resources. Resources do not have to be individuals. They can be other reporting agencies that cover jobs for your firm, or your in-house conference rooms.

Resources

Setting up resources

With resources, you can specify up to four phone numbers (including their cell for SMS job notification—see “Notifying resources”), their pay information (including direct deposit numbers), and their work schedule in 30-minute segments.

1. On the menu bar in RB8, click **Setup** > **Resources.**

2. Click **Actions** (or right-click on the grid), then choose **New.**

3. In the New Resource window, the **General** tab is automatically selected. Enter the following:

    - **Display Name (required) –** This is the name shown on reports and printouts as well as in the Results pane when you search for a contact. Select one of the automatically generated names after you fill out the **First Name, Last Name, Middle Name** (optional) and **Salutation** fields (optional). It is recommended that you use the “Last Name, First Name” format to sort resources alphabetically by last name.
    - **Address –** This is a multi-line field for the street address. Use the **Enter** key to format the address the way you want it to appear on labels and documents. Do not include city, state, postal code or country here.
    - **Postal Cod**e – Enter the resource’s zip code/postal code and click the binoculars button. RB8 will automatically populate the **City/Town, State/Province** and **Country** fields.
    - **Mobile Phone –** Enter the resource’s mobile phone number that will receive notice of a new job via a short text message (SMS) with details in a follow-up email.
    - **SMS Provider** – Select the resource’s mobile phone carrier in the drop-down. RB8’s text messaging will not work if the mobile phone carrier is not correct.
    - **Resource Type –** Select a resource type in the drop-down. The resource type is a designation specifying profession (e.g., Reporter or Videographer).
    - **Search Key –** Skip this field. This is mainly for backward compatibility with RB7.
    - **Warning –** Enter any alerts that anyone using RB8 must be aware of regarding this resource, such as “Do not send to Jones Day” or “Does not like technical jobs.” A yellow warning sign will appear next to the resource name on screens in RB8.

TIP

To send a text message to a contact from within RB8, click the up arrow button next to the **Mobile Phone** field. In the Send SMS window, enter your message and click **OK.**

4. Click the **Additional** tab. Enter the following information:

    - **Email –** Enter the resource’s email address to which job assignment worksheets are sent. You can also send an email to this address by clicking the up arrow button. You can search for resources by email address using the **Email** field in the Resources window’s Search pane.

- **Communication Type –** Select the communication method this resource prefers for receiving job assignments as the default.
- **Certificate No.** – Enter the resource's certificate number here. You can have this information appear on the cover sheet of RB-PDF transcripts by inserting its merge data field into PDF Transcript Cover Page forms. See "Creating forms and letters from templates"
- **Web Account Name –** Enter a unique account name for this resource to use to log into RB Web. If you leave this field blank, the system generates one automatically for you. Afterwards, the resource can change the account name anytime through RB Web.
- **Web Password –** Enter a *strong* password containing up to 14 characters. (See Best Practices in "Creating user accounts.") The resource can change the password anytime through RB Web.
- **ID for Sign** – If your production department will apply reporters' digital signatures to RB-PDF transcripts using RB's Digital Signature Proxy Service, enter the reporter's digital signature ID.
- **Password for Sign** – If your production department will apply reporters' digital signatures to RB-PDF transcripts using RB's Digital Signature Proxy Service, enter the reporter's digital signature password.
- **Billing Address** – If your resource has a separate billing address, check the **Use this address for billing** box and enter only the street address in the **Address** field, then enter the resource's zip code/postal code in the **Postal Cod**e field and click the binoculars button. RB8 will automatically populate the **City/Town, State/Province** and **Country** fields.

NOTE

RB's Digital Signature Proxy is a free service for agencies and reporters to use for granting permission and monitoring usage of digital signatures on RB-PDF Transcripts. Both agencies and reporters must register at www.reporterbase.com to use this service. Additionally, reporters must acquire a Symantec digital signature. More information is available on the website.

5. Click the **Pay Info** tab. Enter the following information:
    - **Do not pay this resource –** Check this box if you do not want to include this resource (e.g., an owner or conference room) in the pay process.
    - **Self Scope –** Check this box if the resource does his or her own scoping.
    - **Priority Level –** Select a priority level in the drop-down. The priority level is a designation specifying order of preference or availability (e.g., Staff or Overflow).
    - **Pay Group –** Select a pay group in the drop-down. (See "Pay Groups.")
    - **Pay Rate Group –** Select a pay rate group in the drop-down. A resource must be connected to a pay rate group. (See "Pay Rate Groups.")
    - **Pay Rate –** Select a default pay rate in the drop-down. The default can be overridden at the time of billing.
    - **Tax ID** – If this resource is an independent contractor, another court reporting agency or other entity that you submit 1099-MISC forms for, enter their tax ID number.
    - **Payroll Ref. No.** – Some reporters or agencies who work for other agencies have their own reference number for their invoices. A number entered here will appear on the Resource Payroll Report and their payroll checks.
    - **Original Term –** Number of days from the invoice date before this resource is paid on originals. Enter "9999" if you pay only after the client has paid. Enter "0" if you guarantee the original and use a cutoff date to specify the "waiting" period.
    - **Copy Term –** Number of days from the invoice date before this resource is paid on copies. Enter "9999" if you pay only after the client has paid. Enter "0" if you guarantee the copies and use a cutoff date to specify the waiting period.
    - **Commission Rate (When Not Cover) –** For a sales rep (account executive), enter a percentage for sales

commissions. For a resource with their own clients (RB8's "Client Of"), enter a percentage for extra commission pay. For example, you might pay an extra 3% in addition to the regular pay when the resource's client initiated a job but someone else covered the job.

- **Commission Rate (When Cover) –** For a sales rep (account executive), enter a percentage for sales commissions. For a resource with their own clients (RB8's "Client Of"), enter a percentage for extra commission pay. For example, you might pay an extra 5% in addition to the regular pay when the resource's client initiated a job and the resource covered the job.
- **Recurring Amount –** Enter an amount to deduct from each paycheck. If an amount is entered, also specify the starting **(Recurring From)** and ending date **(Recurring To).**
- **Print 1099 Form** – Check this box if you provide this resource with 1099 forms.
- **Direct Deposit –** Check this box to make direct deposit of paychecks for this resource. Enter the **Bank Account No.** and **Bank Routing No.** for direct deposit, and select the **Account Type** in the drop-down.

BEST PRACTICES

With direct deposit, you eliminate the problem of lost or stolen paychecks. And your resources do not have to stand in long lines at the bank to deposit their checks. Direct deposit is a valuable benefit to firm owners as well. According to NACHA (National Automated Clearing House Association), the average cost to issue a paper paycheck is approximately $1.20 per person, which doesn't even include distribution and mailing costs!

6. Click the **Work Schedule** tab. The time sheet starts at midnight, and individual squares represent 30-minute increments over a 24-hour period (military time). Click squares to set the resource's normal work schedule (blue is available to work, white is not available). To select a continuous block of time, click and drag across the squares to change them all at once.

7. Click **Save.** RB8 automatically fills in **Resource No., Created, Created By, Last Modified** and **Last Modified By** fields. Five more tabs—**Certifications, , Resource-level Repository, Notes Log** and **Tags**— appear. See "Entering certifications," "Entering specialties," "Uploading files," "Viewing files," "Downloading files," "Making notes" and "Organizing with tags" for more details.

Resources

Entering certifications

When a resource attains board certifications, record it for future reference.

1. In the New Resource window, click the **Certifications** tab.

2. Click **Actions** (or right-click on the grid), then choose **New.**

3. In the New Certification window, enter the following information:
   - **Certification Type –** Select a certification type in the drop-down.
   - **Date Achieved –** Type over the default date in the field, or click the arrow button and select one in the Date Navigator.

4. Click **Save and Close.**

Resources

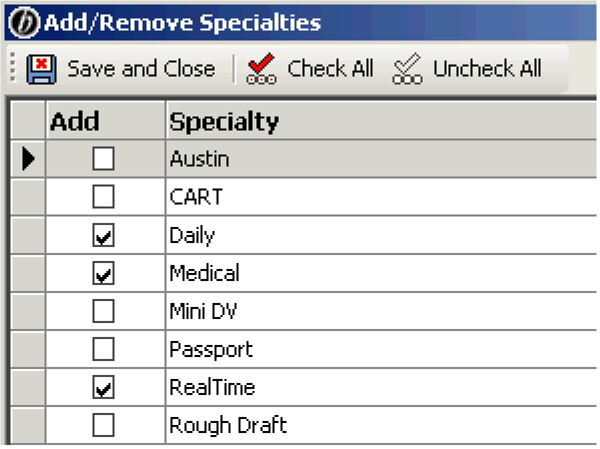
Entering specialties

You can set up resource specialties to make it easy to match resources’ skills to a job’s requirements when scheduling resources.

1. In the Resource window, click the **Specialties** tab.

2. Click **Actions** (or right-click on the grid), then choose **Add/Remove.**

3. In the Add/Remove Specialties window, check a blank box to add the corresponding specialty. Click a marked checkbox to remove a specialty.



Add	Specialty
☐	Austin
☐	CART
☑	Daily
☑	Medical
☐	Mini DV
☐	Passport
☑	RealTime
☐	Rough Draft

4. Click **Save and Close.**

NOTE

Set additional certifications or specialties in the Code Manager’s Resources directory.

- Resource certifications are set up in **Tools** > **Code Manager** > **Resources** > **Certification.**
- Resource specialties are set up in **Tools** > **Code Manager** > **Resources** > **Specialty.** You can have specific resource specialties appear in RB Web by checking the **Show on RBWeb** box for that specialty in the Code Manager.

See “Adding drop-down entries.”

Firms

Firms are entities you do business with, such as law firms, other court reporting firms, vendors, insurance companies, corporate clients and courts. The Firms table is your address book and information file on all of these entities. Enter firm information first, then add all of the individuals you have contact with at that firm as *Contacts.* (See “Contacts.”)

Firms

Setting up firms

Use the Firms table to store information on every firm, court and other entity you do business with.

1. On the menu bar in RB8, click **Setup** > **Firms.**

2. Click **Actions** (or right-click on the grid), then choose **New.**

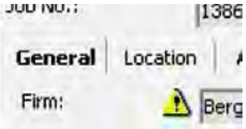
3. In the New Firm window, the **General** tab is automatically selected. Enter the following information:
   - **Firm Name** – **required.**
   - **Address –** This is a multi-line field for the street address. Use the **Enter** key to format the address the way you want it to appear on labels and documents. Do not include city, county, postal code or country here.
   - **Postal Cod**e – Enter the firm’s zip code/postal code and click the binoculars button. RB8 will automatically populate the **City/Town, State/Province** and **Country** fields.
   - **Main Phone** – Enter the 10-digit phone number. This enables you to use this number when searching for a contact in the Contacts window. (See “Setting up contacts.”)
   - **Firm Type –** Select a firm type in the drop-down. The firm type is a designation specifying industry (e.g., Law Firm or Insurance Company).
   - **Search Ke**y **–** Skip this field. This is mainly for backward compatibility with RB7.
   - **Warning –** Enter any alerts that anyone using RB8 must be aware of regarding this firm, such as “In collection, no more orders!” or “Advance deposit is required for all jobs.” This is an internal warning only.

TIP

RB8 comes with a zip code database provided by the United States Postal Service. When you type in a zip code and click the binoculars button**,** the city, state and country appear automatically. Use this feature to verify the zip code for any firm, location or resource you are entering.

NOTE

If you enter text in the **Warning** field of a firm, a yellow warning icon will appear next to the **Firm** field on other RB8 screens related to that firm, such as their contacts or jobs. Pausing the cursor over the icon pops up the warning text.



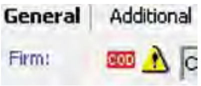
4. Click the **Additional** tab. Enter the following information:
   - **Web URL –** Enter the firm’s website address, so you can go to the firm’s website by clicking the up arrow (launch application) button.
   - **Parent Firm –** For multi-branch firms, you can link them together under their parent firm. The parent firm is usually the main office. Click the binoculars (browse) button to look up and select the parent firm, if

applicable. Designate the parent firm for the main office too, so that when you search in other functions, such as Calendar Manager, you will see the information for all of the related firms in one grid.

- **Email** – Enter the email address to be used for consolidated statements. You can also send an email to this address by clicking the up arrow button.
- **Tax ID** – Enter the firm's tax ID number.
- **COD –** Check this box to mark all invoices sent to this firm "Cash on Delivery." (See "Working with COD invoices.")
- **Always print detail on invoices –** When you bill, you can decide whether to show detailed breakdowns on each invoice or not. Check this box if the firm requires details on all invoices at all times.
- **Consolidate statement –** By default, monthly statements are printed for each contact at this firm separately. Check this box to print consolidated statements addressed to "Accounts Payable."
- **Sales Tax Rate –** Enter a percentage (e.g., "8.250") for calculating and printing sales tax on all invoices for this firm. What's taxable is specified at the service item level. (See "Adding service items.")
- **Finance Charge –** Enter a percentage (e.g., "1.500") for calculating and printing finance charges on all open invoices for this firm. The finance charge is calculated once a month for all open invoices. (See "Generating finance charges.")
- **Late Charge –** Enter a percentage (e.g., "10.000") for calculating and printing late charges on all invoices for this firm. The late charge is a one-time account service fee.
- **Discount Rate –** Enter a percentage (e.g., "7.000") for calculating and printing a negotiated discount on all invoices for this firm. What's discountable is specified at the service item level.
- **Payment Terms** – Select the firm's payment terms in the drop-down.
- **Statement Type –** Select a delivery method for consolidated statements in the drop-down. Select Don't Send if this firm does not want to receive monthly statements.
- **Job due in** – If the firm has a preference for how quickly they expect a job to be turned around, enter the number of days. RB8 automatically calculates a job's due date, excluding weekends but not holidays.
- **Ref. Account No. –** When you set up to have your accounting system read RB8 data, this field can be used to store the reference number (or customer number) that the accounting system has assigned for this firm.
- **Calendar Notes** – Enter information about the firm to appear on Resource Worksheets for jobs for this firm.
- **Billing Address** – If this firm requested that invoices be sent to a different office than the main one entered on the **General** tab, check **Use this address for billing** and enter the address. Invoices and statements will bear this address instead of the main address.

NOTE

If you check **COD** for a firm, a red COD icon appears next to the **Firm** field on other screens related to that firm.



5. Click the **Marketing** tab. Enter the following information:
   - **Firm Class –** Select a firm class in the drop-down. The firm class is a designation specifying the quality or ranking of a law firm. Firm classes are set up in Code Manager. (See "Adding drop-down entries.")
   - **Firm Rating –** Select a firm rating in the drop-down. The firm rating is a designation specifying the credit rating of a firm. Firm ratings are set up in Code Manager.
   - **Source –** Select a source indicating how the client heard of you in the drop-down. Sources are set up in Code Manager.
   - **Client Of –** If this firm belongs to a particular resource, look up the resource by clicking the binoculars button. RB8's Sales Commission Report uses this field to find commissionable invoices.

- **Sales Rep –** If this firm belongs to a particular sales rep (account executive), find the sales rep by clicking the binoculars button. RB8’s Sales Commission Report uses this field to find commissionable invoices.
- **Billing Rate Group –** Select a billing rate group in the drop-down. (See “Billing Rate Groups.”)
- **Misc. Code –** When **Firm Type** and **Firm Class** are not enough to classify firms, use this field to categorize them further by entering your own codes.

6. Click the **Collection Info** tab. Enter the following information:
   - **Collector –** If you are pursuing this client to collect on overdue invoices, look up the person handling this issue by clicking the binoculars button.
   - **Account Status** – Select the current status in the drop-down.
   - **Payment Promised** – If the firm has promised to pay, enter the amount promised here.
   - **Payment By** – Enter the date the firm has promised to pay by. This date will trigger a message to the person listed in the **Collector** field.

7. Click **Save.** RB8 automatically fills in the **Firm No., Created, Created By, Last Modified** and **Last Modified By** fields. Four more tabs—**Preferred Services, Firm-level Repository, Notes Log** and **Tags**—appear. See “Entering a firm’s preferred services,” “Uploading files,” “Viewing files,” “Downloading files,” “Making notes” and “Organizing with tags” for more details.

NOTE

If you change a firm’s **Client Of** resource or **Sales Rep** in the future, RB8 will automatically create an entry in the firm’s **Notes Log** tab with that information.

IMPORTANT

When merging firms, the collection logs will be merged also so you won’t lose any of their collection history. To merge two firms (such as when a client closes a branch office), right-click the firm in the Firms window you are eliminating, then choose **Merge To.** In the Merge To window, find and select the firm you want to add the removed firm’s historical data to. In the RB8 pop-up window, click **Yes.**

Firms

Entering a firm’s preferred services

If you have a client firm with a lot of attorneys, you can enter standing orders (preferred services) as a part of the firm’s profile instead of one by one for each contact in the firm. Then when creating orders for any contacts within this firm, this information is available to help speed the process. (See “Entering service items using billing sets.”)

1. In the Firm window, click the **Preferred Services** tab.

2. Click **New.**

3. In the New Preferred Service window, enter the following information:
   - **Service Group –** Select a main services group in the drop-down.
   - **Service Subgroup –** Select a subgroup in the drop-down. Only those service items belonging to the selected subgroup appear in the **Service Item** drop-down below.
   - **Service Item –** Select a service item in the drop-down.
   - **Delivery Method –** Select a method of delivery in the drop-down.
   - **Instruction –** Enter special instructions, if any, for the production department for this service item.

Contacts

Contacts are individuals who work for firms you do business with, such as attorneys, paralegals, secretaries, claim adjusters, court clerks and other contacts. The Contacts table is where data on all of these individuals is stored.

Contacts

Setting up contacts

Use the Contacts table to store information on everyone you deal with at the different firms you do business with. In RB8, contacts are attached to their firms, so set up the firm first (See “Setting up firms”), then add contacts to it.

1. On the menu bar in RB8, click **Setup** > **Contacts.**

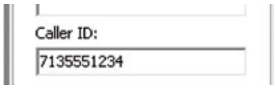
2. Click **Actions** (or right-click on the grid), then choose **New.**

3. In the New Contact window, the **General** tab is automatically selected. Enter the following information:
   - **Display Name (required) –** This is the name shown on reports and printouts as well as in the Results pane when you search for a contact. Select one of the automatically generated names after you fill out the **First Name, Last Name** and **Middle Name** (optional) fields. It is recommended that you use the “First Name Last Name” format, but whatever style you choose, it is important to be consistent in using the same **Display Name** style for all of your contacts in RB8.
   - **Firm (required) –** Click the binoculars button to select the firm this contact belongs to.
   - **Mobile Phone –** Enter the contact’s 10-digit mobile phone number that will receive text messages.
   - **SMS Provider** – Select the contact’s mobile phone carrier in the drop-down. RB8’s text messaging will not work if the mobile phone carrier is not correct.
   - **Contact Type –** Select a contact type in the drop-down. The contact type is a designation specifying profession (e.g., Attorney or Paralegal). Contact types are set up in Code Manager. (See “Adding drop-down entries.”)
   - **Search Key –** Skip this field. This is mainly for backward compatibility with RB7.
   - **Warning –** Enter any alerts that anyone using RB8 must be aware of regarding this contact, such as “Do not send new reporters” or “Allergic to perfumes.” This is an internal RB8 warning like the firm warning.

TIPS

To send a text message to a contact from within RB8, click the up arrow button next to the **Mobile Phone** field. In the Send SMS window, enter your message and click **OK.**

You can search for contacts by phone number. In the **Caller ID** field in the Contacts window Search pane, enter the contact’s 10-digit Main Phone, Direct Phone, Mobile Phone or their firm’s Main Phone number and click **Search.**



Caller ID: 7135551234

4. Click the **Additional** tab. Enter the following information:
   - **Communication Type –** Select the communication method this contact prefers for receiving notifications as the default. Communication types are set up in Code Manager. (See “Adding drop-down entries.”)
   - **Email –** Enter the email address this contact prefers for receiving general email, not job confirmations or invoices. You can send an email to this address from here by clicking the up arrow button. The email address will also appear in the main Contact screen’s results grid, so you do not have to go into a contact’s detail screen to see it.

- **Confirmation Communication Type –** Select the communication method this contact prefers for receiving job confirmations (for scheduling and cancellation) as the default.
- **Confirmation Email –** If you selected email as the **Confirmation Communication Type,** enter the email address this contact prefers for receiving job confirmations, typically their secretary's or paralegal's.
- **Billing Communication Type –** Select the communication method this contact prefers for receiving invoices as the default.
- **Billing Email –** Enter the email address this contact prefers for receiving invoices if you selected email as the **Billing Communication Type.**
- **Web Account Name –** Enter a unique account name for this contact to use to log into RB Web. If you leave this field blank, the system generates one automatically for you. Afterwards, the contact can change the account name anytime through RB Web.
- **Web Password –** Enter a *strong* password containing up to 14 characters. (See Best Practices in "Creating user accounts.") The contact can change the password anytime through RB Web.
- **Calendar Notes** – Enter information, such as special procedures your reporters must follow when working with this contact, to appear on Resource Worksheets for jobs for this contact.
- **Production/Billing Notes** – Enter text here to display on production billing sheets.

5. Click the **Marketing** tab. Enter the following information:
   - **Rating –** Select a rating in the drop-down. The rating is a designation specifying the credit rating of the individual contact. Credit ratings are set up in Code Manager. (See "Adding drop-down entries.")
   - **Client Of –** If this contact's firm belongs to a particular resource, that name should appear here. If this contact belongs to a different resource, look up the resource by clicking the binoculars button. RB8's Sales Commission Report uses this field to find commissionable invoices.
   - **Sales Rep –** If this contact's firm belongs to a particular sales representative (account executive), that name should appear here. If this contact belongs to a different sales representative, look up the sales rep by clicking the binoculars button. RB8's Sales Commission Report uses this field to find commissionable invoices.
   - **Billing Rate Group –** Select a billing rate group in the drop-down.
   - **Misc. Code –** When **Job Title** and **Contact Type** are not enough to classify contacts, use this field to categorize them further by entering your own codes.
   - **Home Address –** When you send out a birthday card or reward certificate to this contact, RB8 provides an option for you to send it either to the firm address or to the home address.
   - **Anniversaries** – Keep track of important client dates, such as birthdays and anniversaries, by adding them here with automatic alerts through the Message Center. See "Remembering important client dates."
6. Click **Save.** RB8 fills in the **Contact No., Created, Created By, Last Modified** and **Last Modified By** fields. Six (or seven) more tabs—**Manage Assistants, Manage Access, Preferred Services, Contact-level Repository, Notes Log, Award Points** (if you have the Reward Points plug-in) and **Tags**—appear. See "Managing assistants," "Managing RB Web access," "Entering a contact's preferred services," "Uploading files," "Viewing files," "Downloading files," "Making notes," and "Organizing with tags" for more details.

NOTE

If you change a contact's **Client Of** resource or **Sales Rep** in the future, RB8 will automatically create an entry in the contact's **Notes Log** tab with that information.

TIP

A quick way to add more contacts for a firm is to copy (replicate) an existing contact:

1. On the contact list, right-click a contact to copy from, then choose **Copy.**
2. Modify only those fields that are different, including the display name. Then click **Save and Close.**

Contacts

Remembering important client dates

Use RB8 to keep track of important dates, such as birthdays and anniversaries, for all of your contacts. You can track multiple dates for each contact, and send yourself or other staff members automatic reminders of the dates. Use Anniversary Inquiry to generate envelopes or labels for cards. (See "Keeping track of important client dates.")

1. In the Contact - [contact name] window on the **Marketing** tab, click **New** under Anniversaries.

2. In the New Anniversary window, enter the following information:
   - **Anniversary Type** – Select the celebration type in the drop-down.
   - **Anniversary Date/Anniversary Year –** Click the arrows to use the Date Navigators to select the dates.
   - **Alert in advance** – Enter the number of days prior to the event you want to be reminded.

3. Under Alert To, click **Add.**

4. In the Lookup Users window, check the **Select** box next to each person you want to receive a reminder of the anniversary through the Message Center.

Contacts

Managing assistants

Each contact can have an unlimited number of assistants (such as secretaries) and can be the assistant of an unlimited number of contacts. An *Assistant* can be any other contact from the same firm. Assistant names appear in the Ordered By drop-down in Calendar**.**

1. In the Contact window, click the **Manage Assistants** tab.

2. To designate this contact's assistants, click **Add/Remove** in the Assistants section.

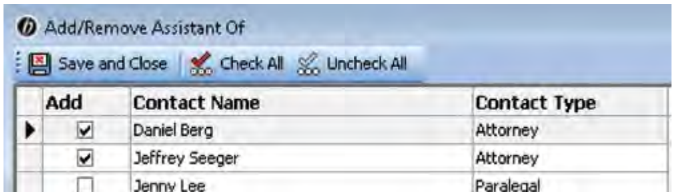
3. In the Add/Remove Assistants window, check a blank box to add the corresponding assistant. Click a marked checkbox to remove an assistant.

4. Click **Save and Close.**

TIP

If a secretary works for several attorneys, there is a quicker way to make the secretary an assistant of multiple attorneys than going into each attorney's profile one at a time:

1. In the detail screen for the secretary, click the **Manage Assistants** tab.
2. Click **Add/Remove** in the Assistant Of section.
3. In the Add/Remove Assistant Of window, check the **Add** box next to each attorney the secretary is an assistant of. Click **Check All** to speed the selection of multiple contacts.



Add	Contact Name	Contact Type
☑	Daniel Berg	Attorney
☑	Jeffrey Seeger	Attorney
☐	Jenny Lee	Paralegal

Contacts

Managing RB Web access

Each contact can have an unlimited number of seniors (for example, lead attorneys or paralegals — anyone who oversees a case). A *Senior* can be any other contact from any firm. Seniors have access to all activities in RB Web associated with any contact to whom they are senior.

1. Click the **Manage Access** tab in the Contact window.

2. To designate a contact's seniors within their own firm, click **Add/Remove** in the Grant Access To section. Then in the Add/Remove Grant Access To window, check a blank box to add the corresponding senior. Click a marked checkbox to remove a senior.

3. To designate a contact's seniors from outside their firm, click **Add** in the Grant Universal Access To section. Then in the Lookup Contact window, search for the contact(s). Check the box next to any outside contacts who should have access to this contact's RB Web activities and click **Select.**

4. Click **Save and Close.**

TIP

If a lead attorney or paralegal oversees a case involving several attorneys, there is a quicker way to grant the lead access to multiple attorneys than going into each attorney's profile one at a time.

1. In the detail screen for the lead, click the **Manage Access** tab.
2. For contacts within the same firm, click **Add/Remove** in the Have Access To section. Then in the Add/Remove Have Access To window, check the **Add** box next to each attorney the paralegal should have access to.
3. For contacts outside of the firm, click **Add** in the Have Universal Access To section. Then in the Lookup Contact window, search for the contact(s). Check the box next to any outside contacts this lead should have access to and click **Select.**

Contacts

Entering a contact's preferred services

If a contact has standing orders (preferred services), you can enter them as a part of the contact's profile. This information can be imported directly into Turn-in. (See "Entering service items using billing sets.")

1. In the Contact window, click the **Preferred Services** tab.

2. Click **New.**

3. In the New Preferred Service window, enter the following information:
   - **Service Group –** Select a main services group in the drop-down.
   - **Service Subgroup –** Select a subgroup in the drop-down. Only those service items belonging to the selected subgroup appear in the **Service Item** drop-down below.
   - **Service Item –** Select a service item in the drop-down.
   - **Delivery Method –** Select a method of delivery in the drop-down.
   - **Turnaround Type** – Select the production turnaround time in the drop-down.
   - **Instruction –** Enter special instructions, if any, for the production department for this service item.

Locations

Locations are places where jobs take place, such as court rooms or law offices. Since law firms and courts are normally entered in the Firms table as “firms,” use the Locations table for other types of locations where jobs recur, such as private residences, doctors’ offices, conference facilities or schools.

Locations

Setting up locations

Enter recurring job locations into the Locations table with complete contact information, details about the location and directions.

1. On the menu bar in RB8, click **Setup** > **Locations.**

2. Click **Actions** (or right-click on the grid), then choose **New.**

3. In the New Location window, the **General** tab is automatically selected. Enter the following information:
   - **Location Name** – **required.**
   - **Address –** This is a multi-line field for the street address. Use the **Enter** key to format the address the way you want it to appear on labels and documents. Do not include city, county, postal code or country here.
   - **Postal Cod**e – Enter the location’s zip code/postal code and click the binoculars button. RB8 will automatically populate the **City/Town, State/Province** and **Country** fields.
   - **Contact –** Enter the name of the location’s main contact person.
   - **Location Type –** Select a location type in the drop-down. The location type is a designation specifying category of facility (e.g., Hospital or School). Location types are set up in Code Manager. (See “Adding drop-down entries.”)
   - **Warning –** Enter any alerts that one must be aware of regarding this location. This is an internal RB8 warning like the firm warning.

4. Click the **Additional** tab. Enter the main contact’s email address, preferred method of contact, and directions to the location.

5. Click **Save.** RB8 automatically fills in **Location No., Created, Created By, Last Modified** and **Last Modified By.** Three more tabs — **Notes Log, Tags,** and **Location-level Repository** — appear. See “Making notes,” “Organizing with tags,” “Uploading files,” “Viewing files” and “Downloading files” for more details.

NOTE

If you know a location is going to be used for one job only and you won’t need it again, you do not have to enter it into the Locations table. You can enter it directly into the job itself when setting up the job in RB8.

TIP

If you are entering a new location that is similar to an existing one, save time and reduce errors by copying an existing one and changing only the different information**:**

1. On the location list, right-click a location to copy from, then choose **Copy.**
2. Modify only those fields that are different, then click **Save and Close.**

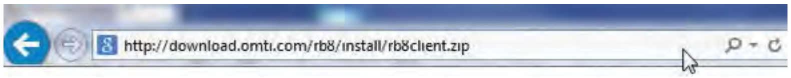
Appendix

Installing RB8 Client on your computer

Before you can use RB8 — or anytime you want to use RB8 on a different computer — download, install and set up RB8 client software on your desktop computer or laptop, and connect it to your RB8 database.

1. When you want to install RB8 on a workstation or laptop, contact us for a download link.

2. On the machine you want to install RB8, open the email and click the link. Or open an Internet browser and type or paste the entire address (starting with https) in the URL field.

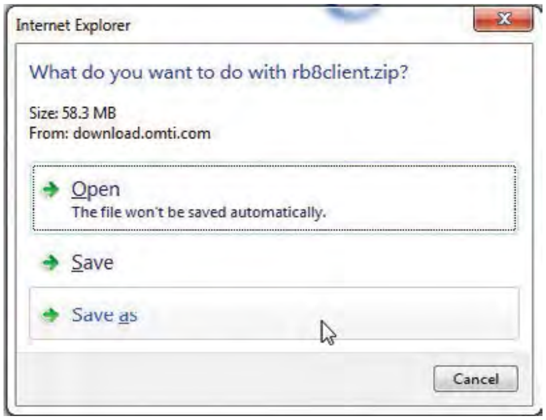


http://download.omti.com/rb8/install/rb8client.zip

NOTE

The link we provide is valid for 48 hours.

3. Save the .zip file to your computer.



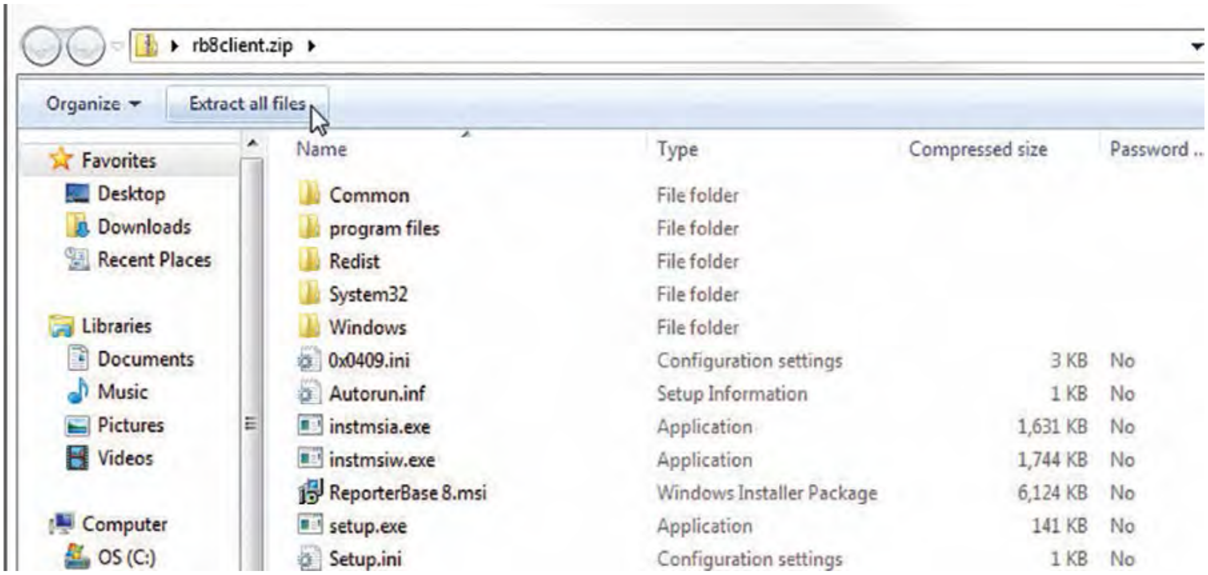
Internet Explorer

What do you want to do with rb8client.zip?

Size: 58.3 MB
From: download.omti.com

Open
The file won't be saved automatically.
Save
Save as
Cancel

4. After download completes, open the .zip file you saved and extract all files to a folder.



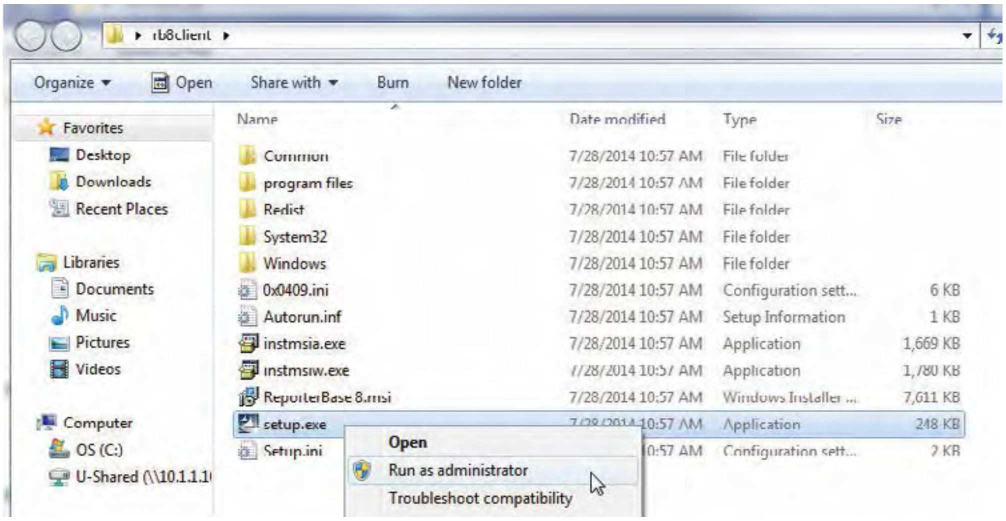
rb8client.zip

Organize
Extract all files
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Computer
OS (C:)

Name	Type	Compressed size	Password ..
Common	File folder		
program files	File folder		
Redist	File folder		
System32	File folder		
Windows	File folder		
0x0409.ini	Configuration settings	3 KB	No
Autorun.inf	Setup Information	1 KB	No
instmsia.exe	Application	1,631 KB	No
instmsiw.exe	Application	1,744 KB	No
ReporterBase 8.msi	Windows Installer Package	6,124 KB	No
setup.exe	Application	141 KB	No
Setup.ini	Configuration settings	1 KB	No

5. Once all files have been extracted, navigate to the RB8Client folder that has been created and execute the

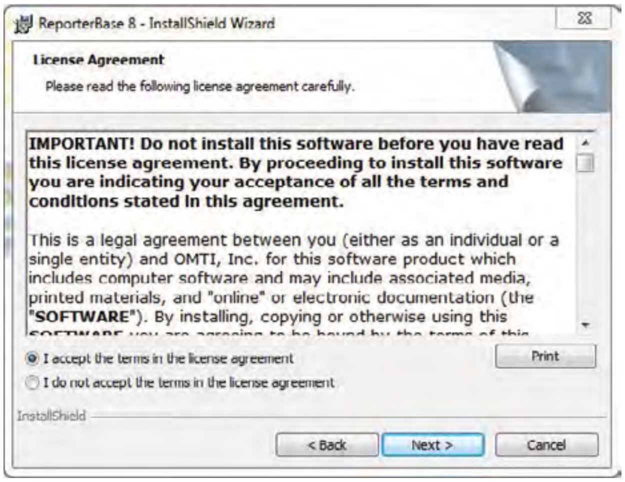
Setup.exe to begin installation. To ensure that installation runs properly, right-click on Setup.exe and select **Run as Administrator.**


rb8client
Organize
Open
Share with
Burn
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Computer
OS (C:)
U-Shared (\\10.1.1.1
Open
Run as administrator
Troubleshoot compatibility

Name	Date modified	Type	Size
Common	7/28/2014 10:57 AM	File folder	
program files	7/28/2014 10:57 AM	File folder	
Redist	7/28/2014 10:57 AM	File folder	
System32	7/28/2014 10:57 AM	File folder	
Windows	7/28/2014 10:57 AM	File folder	
0x0409.ini	7/28/2014 10:57 AM	Configuration sett...	6 KB
Autorun.inf	7/28/2014 10:57 AM	Setup Information	1 KB
instmsia.exe	7/28/2014 10:57 AM	Application	1,669 KB
instmsiw.exe	7/28/2014 10:57 AM	Application	1,780 KB
ReporterBase 8.msi	7/28/2014 10:57 AM	Windows Installer ...	7,611 KB
setup.exe	7/28/2014 10:57 AM	Application	248 KB
Setup.ini	10:57 AM	Configuration sett...	2 KB

6. At the splash screen, click **Next.**

7. In the License Agreement screen, check the **I accept the terms in the license agreement** box and click **Next.**


ReporterBase 8 - InstallShield Wizard
License Agreement
Please read the following license agreement carefully.
Print
InstallShield
< Back
Next >
Cancel

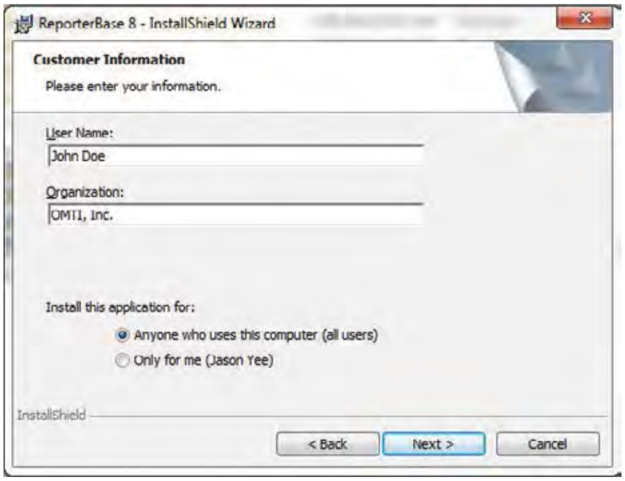
IMPORTANT! Do not install this software before you have read this license agreement. By proceeding to install this software you are indicating your acceptance of all the terms and conditions stated in this agreement.

This is a legal agreement between you (either as an individual or a single entity) and OMTI, Inc. for this software product which includes computer software and may include associated media, printed materials, and "online" or electronic documentation (the "**SOFTWARE**"). By installing, copying or otherwise using this

● I accept the terms in the license agreement

○ I do not accept the terms in the license agreement

8. In the Customer Information screen, enter your user name and company information (optional) and click **Next.**


ReporterBase 8 - InstallShield Wizard
Customer Information
Please enter your information.
InstallShield
< Back
Next >
Cancel

User Name: John Doe

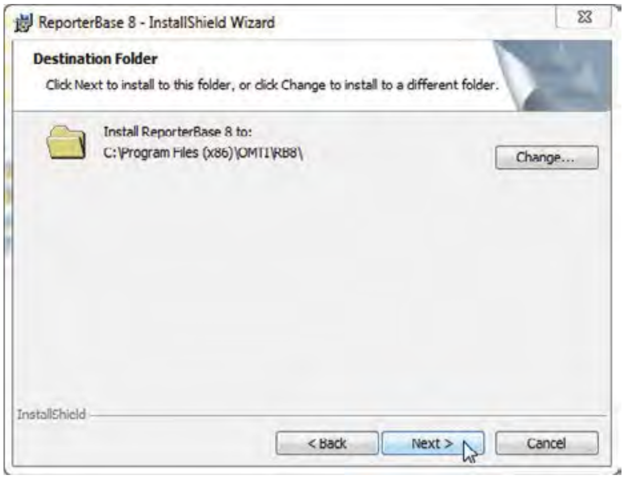
Organization: OMTI, Inc.

Install this application for:

● Anyone who uses this computer (all users)

○ Only for me (Jason Yee)

9. In the Destination Folder screen:
   - To install RB8 to the default location, click **Next.**
   - If you wish to change the destination of where RB8 is installed, click **Change** and select the path manually.



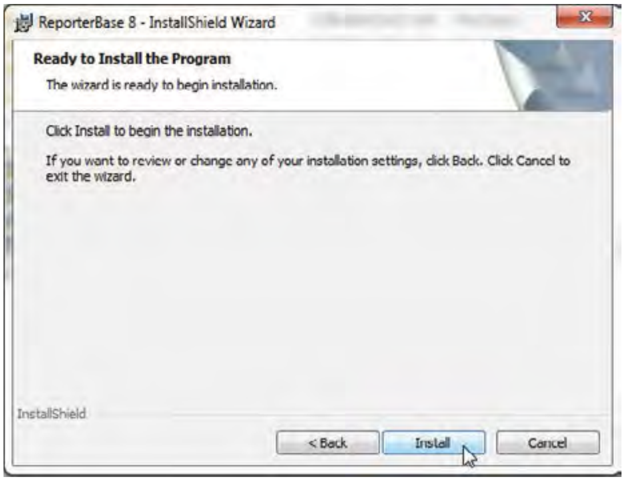
ReporterBase 8 - InstallShield Wizard

Destination Folder

Click Next to install to this folder, or click Change to install to a different folder.

Install ReporterBase 8 to:
C:\Program Files (x86)\OMTI\RB8\

10. In the Ready to Install the Program screen, click **Install** to start the installation process.



ReporterBase 8 - InstallShield Wizard

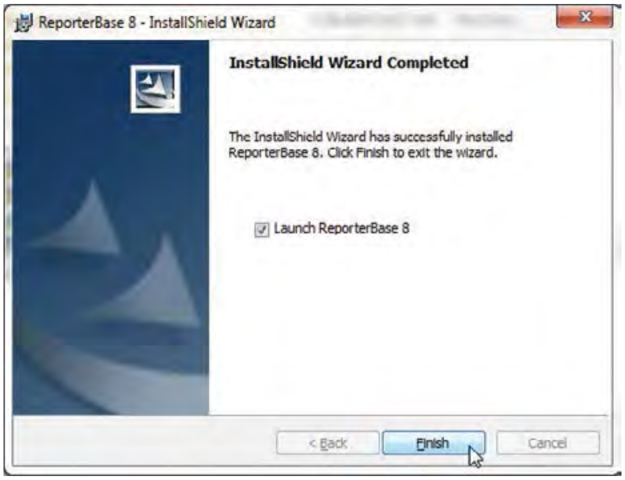
Ready to Install the Program

The wizard is ready to begin installation.

Click Install to begin the installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

11. Once installation is complete, check the **Launch ReporterBase 8** box and click **Finish.** RB8 launches automatically.



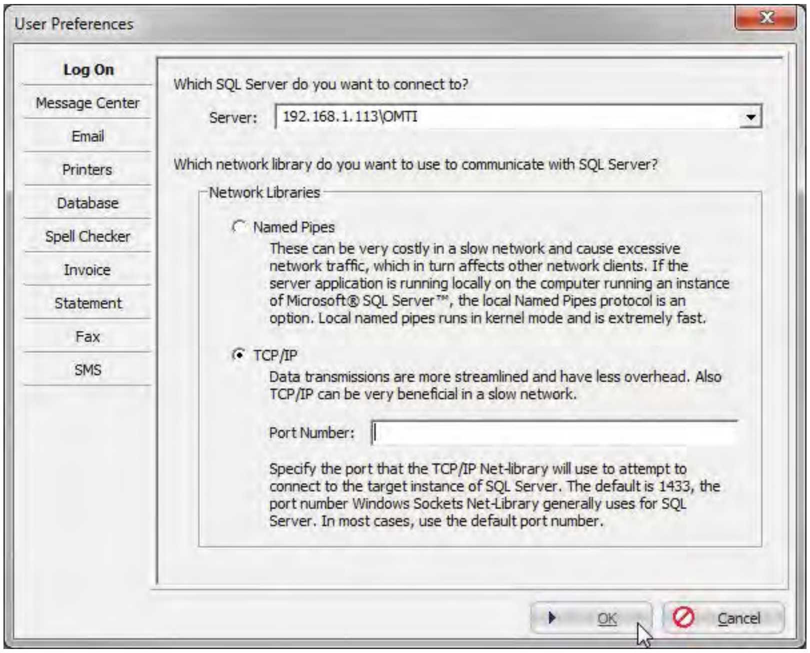
ReporterBase 8 - InstallShield Wizard

InstallShield Wizard Completed

The InstallShield Wizard has successfully installed ReporterBase 8. Click Finish to exit the wizard.

☑ Launch ReporterBase 8

12. When you first launch RB8, configure RB8 to point to the RB8 database hosted on your server: In **Personal > User Preferences,** enter either the server name or the internal static IP of the server in the **Server** field of the Log On tab.



Which SQL Server do you want to connect to?

Server: 192.168.1.113\OMTI

Which network library do you want to use to communicate with SQL Server?

Network Libraries

○ Named Pipes
These can be very costly in a slow network and cause excessive network traffic, which in turn affects other network clients. If the server application is running locally on the computer running an instance of Microsoft® SQL Server™, the local Named Pipes protocol is an option. Local named pipes runs in kernel mode and is extremely fast.

● TCP/IP
Data transmissions are more streamlined and have less overhead. Also TCP/IP can be very beneficial in a slow network.

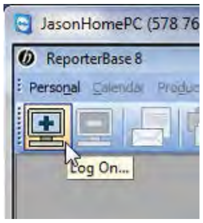
Port Number:

Specify the port that the TCP/IP Net-library will use to attempt to connect to the target instance of SQL Server. The default is 1433, the port number Windows Sockets Net-Library generally uses for SQL Server. In most cases, use the default port number.

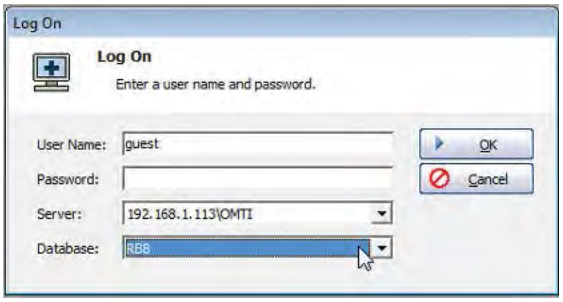
IMPORTANT

If your SQL Server was installed using an instance name, enter \InstanceName after the server name or IP.

13. Click the **Log On** icon.



14. In the Log On window, RB8 should appear in the **Database** field. Seeing RB8 in the **Database** field means that the RB8 client has made a successful connection to the RB8 database hosted on your server.



Log On

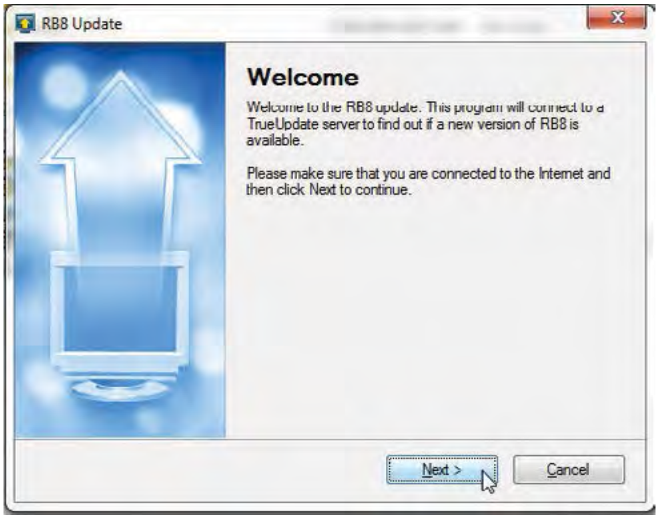
Enter a user name and password.

User Name: guest
Password:
Server: 192.168.1.113\OMTI
Database: RB8

15. If you already have a user ID and password for RB8, enter those credentials and click **OK.** If you do not have credentials or this is a new system installation, you can use one of our default accounts to log in to RB8:

- **User Name:** guest, **Password:** guest
- **User Name:** administrator, **Password:** RB8Admin (case sensitive)

16. The Auto Update splash screen will appear. Click **Next.**

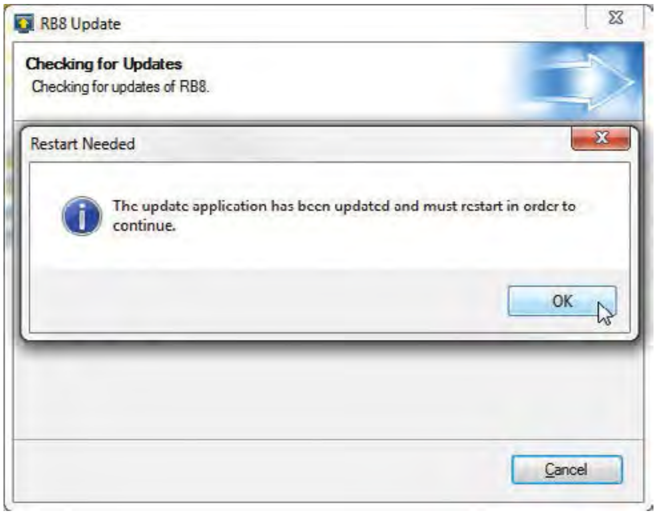

RB8 Update
Next >
Cancel

Welcome

Welcome to the RB8 update. This program will connect to a TrueUpdate server to find out if a new version of RB8 is available.

Please make sure that you are connected to the Internet and then click Next to continue.

17. Click **OK** in the Restart Needed pop-up.

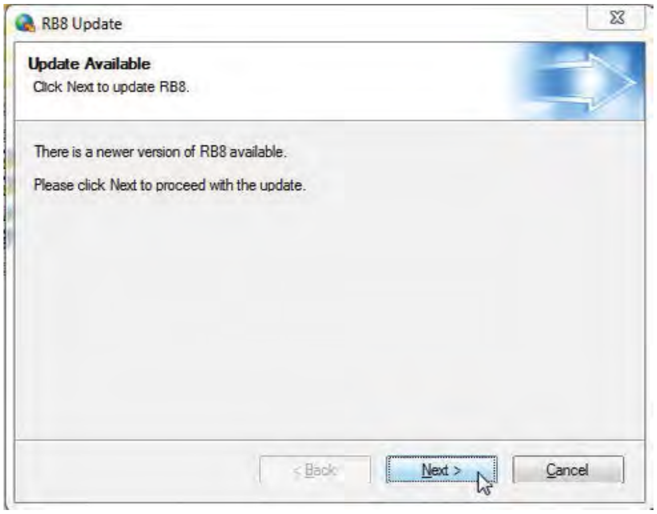

RB8 Update
Restart Needed
OK
Cancel

Checking for Updates

Checking for updates of RB8.

The update application has been updated and must restart in order to continue.

18. Auto Update will recognize a new update is available. Click **Next** to start the update.


RB8 Update
< Back
Next >
Cancel

Update Available

Click Next to update RB8.

There is a newer version of RB8 available.

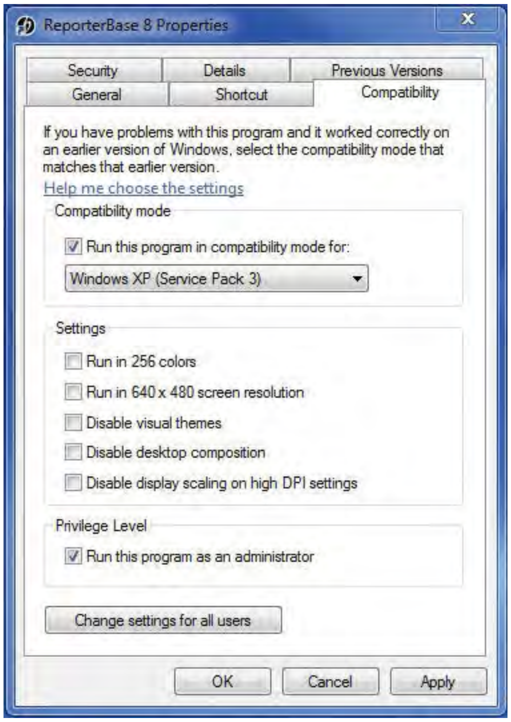
Please click Next to proceed with the update.

19. Once the update completes, RB8 will launch and take you to the Log On window. You can now log in to RB8, and the installation is complete.

NOTE

There is an additional setting that should be made from the RB8 desktop icon:

1. Right-click on the RB8 desktop icon and select **Properties.**
2. In the Properties window, click the **Compatibility** tab and check the boxes for:
   - **Run this program in compatibility mode** and select Windows XP (Service Pack 3) in the drop-down.
   - **Run this program as an administrator.**



ReporterBase 8 Properties

If you have problems with this program and it worked correctly on an earlier version of Windows, select the compatibility mode that matches that earlier version.

Help me choose the settings

Compatibility mode

☑ Run this program in compatibility mode for:

Windows XP (Service Pack 3)

Settings

☐ Run in 256 colors
☐ Run in 640 x 480 screen resolution
☐ Disable visual themes
☐ Disable desktop composition
☐ Disable display scaling on high DPI settings

Privilege Level

☑ Run this program as an administrator

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Details
Previous Versions
General
Shortcut
Compatibility
Change settings for all users
OK
Cancel
Apply

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