



# ReporterBase|8

Legal Support Firm Software



## **RB8 Essential Training**

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## RB8 Training Orientation

**Essential Training overview**

Welcome to RB8 Essential Training. Before using RB8, orient yourself to the program and what it can do for you by completing the recommended lessons. These lessons cover the major tasks you can accomplish in RB8.

The lessons are grouped into modules. You do not have to complete all of the modules before using RB8, just the ones recommended for the kind of work you do. Use this chart to determine which lessons you should watch and to see how long your training will take.

**Recommended Lesson Plans – By Department**

Department	Lessons to Watch (in order)	Time Needed
<b>Calendar</b>	Program Basics	64 minutes
	Case Management & Central Repository	40 minutes
	Calendar	83 minutes
<b>Production</b>	Program Basics	64 minutes
	Production	47 minutes
<b>Billing</b>	Program Basics	64 minutes
	Production (partial*)	35 minutes
	Billing	38 minutes
<b>Accounting</b>	Program Basics	64 minutes
	Receivables	66 minutes
	Payables	52 minutes

*\* Watch the first eight Production module movies only.*

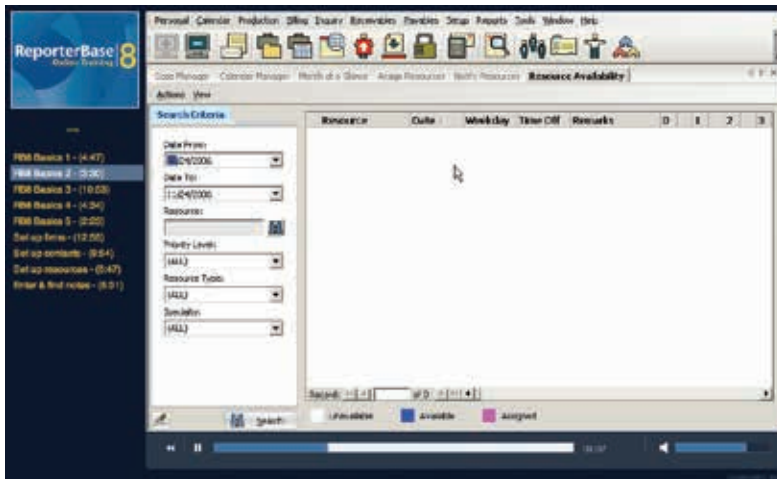
**NOTE**

In addition to viewing RB8 Essential Training, review the **RB8 Essentials Guide** attached to this manual, which contains RB8 workflow charts, common terms, FAQs and important concepts to help you get the most out of RB8.

## RB8 Training Syllabus

**How to use modules**

All of the modules work similarly: On the left side of the screen, click a lesson title to jump to its movie directly. Otherwise, movies play in sequential order. At the bottom of the screen, a progress bar displays where you are in a movie. Skip to different parts of the movie by clicking in the bar. Stop the movie by clicking the double-bar icon. Return to the beginning of the movie by clicking the double-arrow icon. Adjust the sound level by clicking in the Volume bar at the bottom right of the window.



*Sample lesson screen*

If you are not sure if a module is relevant to you, read its synopsis below. For a list of individual lessons and their times, refer to Training Contents.

**Program Basics**

Before reviewing the lessons for a particular RB8 module, it's helpful to know how the overall program works and how you can use it most efficiently. In Program Basics, you will learn how to customize RB8 windows to your work style, increase your efficiency with RB8 shortcuts, learn how to find information, add information and otherwise work with information in RB8.

**Recommended for:** All RB8 users

**Case Management & Central Repository**

If you schedule jobs or work with case files, you can increase your efficiency and decrease paper around the office with RB8's Case Manager and Central Repository. In this module, you will learn how to archive and find files in the repository; set up on-going cases, including parties, their standing orders and billing information; grant online access or email files to clients and resources; set recurring jobs from cases; update info on multiple jobs simultaneously; and settle cases.

**Recommended for:** Calendar department

**Calendar**

The calendar is often considered the most important area – or heart – of your business. This is reflected in RB8 training – it is the longest module in the pack. In this module, you will learn how to set up your RB8

Calendar to work efficiently and match your needs and preferences; find existing settings quickly; create new jobs, including recurring jobs and linked video jobs, from scratch or copy from an existing job; select job locations; add requested services and specialties; archive and publish notices; maintain job notes; mass-update recurring jobs; confirm, cancel and reschedule jobs; assign, notify and manage resources; perform daily tasks, such as calendar audits and backups; generate and email calendar reports; and use best practices for scheduling jobs in RB8, including sharing jobs through RB XChange.

**Recommended for: Calendar department**

## **Production**

Maximize your productivity in production by completing all the lessons in this module. This module orients you to the production process in RB8 so you can save a lot of time when processing jobs for billing. In this module, you will learn how to turn in jobs; add witnesses, parties, billing information, orders and services to a job, including Prefill and replicate shortcuts; upload files to the repository; publish files online and alert clients; combine multiple witnesses under a single job number; prepare invoices; designate rush jobs and shipping methods; override billing rates on individual invoices; create PDF transcripts; compose letters; print envelopes and labels; and track original transcripts.

**Recommended for: Production & Billing departments**

## **Billing**

After the initial invoice preparation in Production, you verify billing data and maintain quality control while generating invoices in Billing. In this module, you will learn how to specify billing and pay rates; calculate invoices; override rates; archive PDF versions of invoices; preview, post and send detailed or summary invoices; add credit card payment options; customize invoice headers and messages; include additional pay amounts; batch print invoices; produce and track COD invoices; resend current or original posted invoices; transfer posted invoices; and void and re-bill invoices.

**Recommended for: Billing department**

## **Receivables**

Processing payments correctly saves time and money in the long run. In this module, you will learn how to enter payments and apply them to open invoices, including discounts, overpayments, late charges, finance charges and multiple-invoice payments; speed up payment processing with keyboard shortcuts; handle third-party payers; prepare deposit slips; handle retainers, credits, debits, duplicate payments, refunds and miscellaneous receipts; void or write off uncollectible invoices; post transactions; print daily sales and receipts registers; audit receivables transactions; generate finance charges; send monthly statements, including consolidated statements; print aged A/R reports; send collections letters and copies of invoices; track collections efforts; set collections reminders; follow up on collections; and forecast income from collections.

**Recommended for: Accounting department**

## **Payables**

Generating complete and accurate payrolls is as important as generating complete and accurate invoices. In this module, you will learn how to set pay dates and payment terms, including deductions and direct deposit; follow proper payroll procedure; audit and verify payroll; override payroll; correct resource pay; close payroll; print payroll reports; print, export to *QuickBooks*, or direct deposit checks; track and pay sales commissions for reporters and sales reps; designate commissionable services, non-commissionable services and deductible expenses; override sales commissions; generate sales commission reports; apply sales tax; generate related reports; and audit payroll liability.

**Recommended for: Accounting department**

**RB8 Essential Training*****Training contents***

The following lists detail which lessons are covered in which area and each lesson's length. Use these lists to locate a particular lesson or to determine if you should review a particular module.

**Program Basics****Program Basics**

- |                               |         |
|-------------------------------|---------|
| 1. RB8 Basics – 1             | (4:47)  |
| 2. RB8 Basics – 2             | (3:30)  |
| 3. RB8 Basics – 3             | (10:53) |
| 4. RB8 Basics – 4             | (4:34)  |
| 5. RB8 Basics – 5             | (2:23)  |
| 6. Setting up firms           | (12:55) |
| 7. Setting up contacts        | (9:54)  |
| 8. Setting up resources       | (8:47)  |
| 9. Entering and finding notes | (5:31)  |

**Calendar****Case Management**

- |                                 |        |
|---------------------------------|--------|
| 1. Understanding repositories   | (6:52) |
| 2. Setting up new cases – 1     | (8:31) |
| 3. Setting up new cases – 2     | (6:31) |
| 4. Uploading to Case Repository | (5:44) |
| 5. Creating jobs from cases     | (8:04) |
| 6. Settling cases               | (4:12) |

**Calendar**

- |                            |        |
|----------------------------|--------|
| 1. Calendar Basics         | (5:15) |
| 2. Creating new jobs – 1   | (8:33) |
| 3. Creating new jobs – 2   | (8:32) |
| 4. Creating new jobs – 3   | (6:13) |
| 5. Creating recurring jobs | (5:16) |
| 6. Creating linked jobs    | (3:52) |
| 7. Confirming jobs         | (5:18) |
| 8. Assigning resources     | (6:40) |
| 9. Replicating assignments | (2:14) |
| 10. Notifying resources    | (5:19) |
| 11. Resource availability  | (2:59) |
| 12. Month at a Glance      | (1:27) |
| 13. Daily tasks            | (6:01) |
| 14. Calendar reports       | (7:31) |
| 15. Best Practices         | (5:46) |

## Production & Billing

### Production

1. Turn-in Basics (3:35)
2. Adding witnesses (5:21)
3. Adding parties & orders (4:23)
4. Adding service items (5:05)
5. Copying from previous turn-in (4:06)
6. Replicating copy orders (2:58)
7. Multiple witnesses (4:53)
8. Finishing Turn-in (4:00)
9. Making PDF Transcripts (4:22)
10. Printing letters (2:56)
11. Printing envelopes and labels (2:24)
12. Tracking originals (2:19)

### Billing

1. Billing – 1 (10:33)
2. Billing – 2 (5:36)
3. Billing – 3 (5:00)
4. Batch printing invoices (1:49)
5. COD invoices (4:17)
6. Reprinting posted invoices (2:21)
7. Transferring invoices (4:19)
8. Voiding and re-billing invoices (3:46)

## Accounting

### Receivables

1. Processing payments – 1 (7:02)
2. Processing payments – 2 (8:40)
3. Processing payments – 3 (8:16)
4. Working with retainers (6:02)
5. Issuing credit memos (2:38)
6. Issuing debit memos (1:06)
7. Entering duplicate payments (2:12)
8. Recording refunds made (1:37)
9. Entering miscellaneous receipts (1:12)
10. Voiding invoices (1:15)
11. Writing off uncollectible invoices (1:29)
12. Receivables Daily Wrap-Up (4:10)
13. Sending monthly statements (9:45)
14. Collections (10:04)

## Payables

1. Getting ready for payroll	(6:38)
2. Paying resources	(5:31)
3. Correcting resource pay	(5:25)
4. Closing payroll	(3:14)
5. Printing final resource payroll report	(1:35)
6. Printing or exporting checks	(4:41)
7. Working with sales commissions – 1	(6:50)
8. Working with sales commissions – 2	(8:08)
9. Overriding sales commissions	(2:25)
10. Working with sales tax	(2:59)
11. Total Payable Report	(2:00)
12. Liability Balance Log	(1:32)

### RB8 Support

#### ***Additional training and other resources***

In addition to these lessons, OMTI provides a variety of resources to help you get the most out of RB8:

- For live RB Support, contact us via email, phone or Live Chat on our website.
- To find information on your own, visit our website for helpful articles and step-by-step tutorials.
- To watch additional training videos, visit our channel on YouTube (<http://www.youtube.com/user/OMTIUSA>).
- To learn about the latest technological developments and best business practices in your industry, attend the annual Team RB user conference.
- To keep up with new developments in RB8 and other ReporterBase products and services, visit the News section of our website, like us on Facebook ([www.facebook.com/ReporterBase](http://www.facebook.com/ReporterBase)), and/or follow us on Twitter ([twitter.com/ReporterBase8](https://twitter.com/ReporterBase8)).

If you are interested in specialized training or more advanced tutorials, contact RB Sales at OMTI.

### RB8 Training Orientation

#### ***Additional information for firm owners***

These recorded training sessions cover the main modules in RB8. The Program Basics module contains basic information that everyone who will be using RB8 should review. The other modules focus on particular departments, so for example, your calendar staff needs to complete the first and second modules before scheduling jobs in RB8. Refer to the Recommended Lesson Plans for more information.

We recommend having employees view modules based on what areas they work in, so people learn only what they need to know and can start using RB8 quickly. The time needed to complete each module is listed in the Recommended Lesson Plans chart.

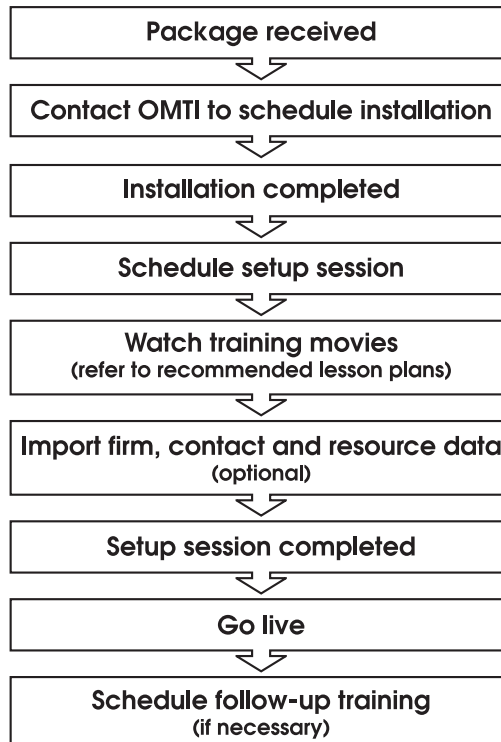
Please note: These training modules were created in 2007. RB8 is regularly updated with new features each year. After viewing these basic videos, employees should also view the newer videos on our website that relate to their departments to learn how to best use the latest RB8.



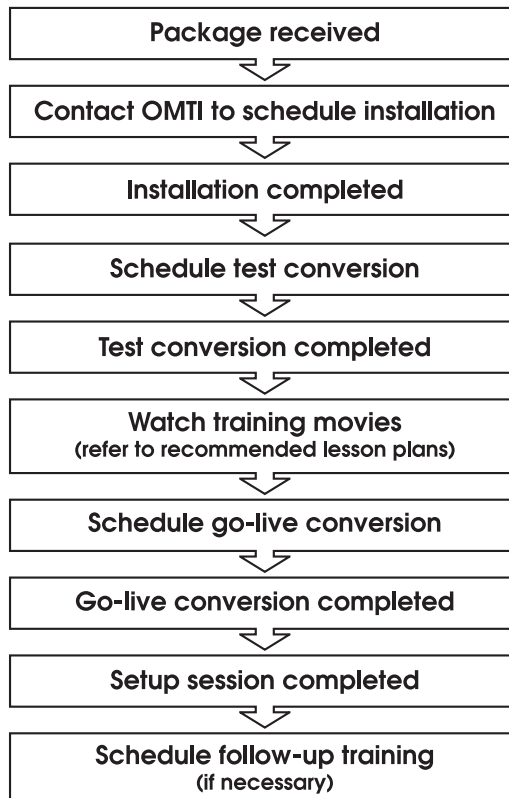
## RB8 Setup Workflows

**Setting up RB8**

In addition to training, there are other tasks involved in adding RB8 to your business. To ensure that your RB8 integration goes smoothly, follow the steps in the relevant Getting Started workflow chart. Contact RB Support for assistance.

**Getting Started workflow for new clients**

## Getting Started workflow for upgrade clients



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