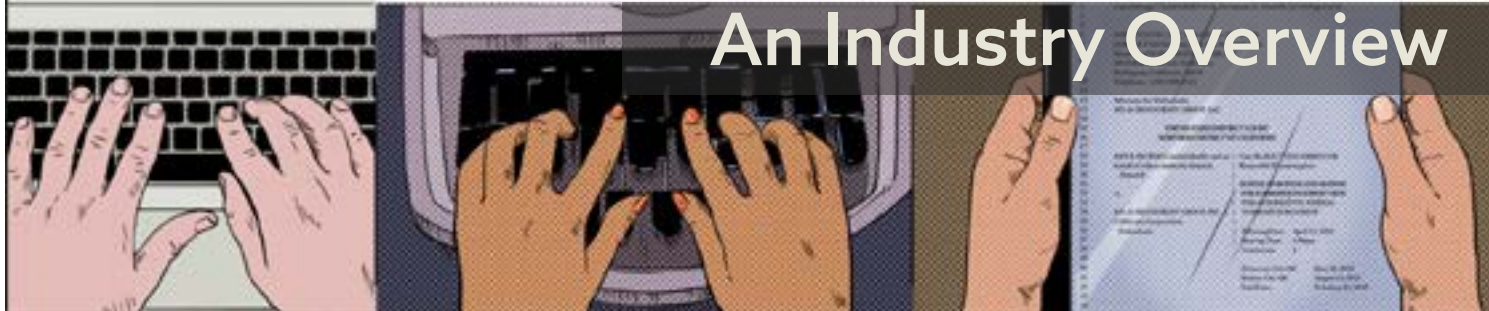




# REPORTERBASE & COURT REPORTING

An Industry Overview





## Reporterbase

Court Reporting/Legal Support Business Management Software

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# REPORTERBASE & COURT REPORTING

## An Industry Overview

OMTI, developers of ReporterBase business management software, originally created this industry overview to train our support staff and software development team. Our support people need to understand the American court system and court reporting businesses to be able to help clients use RB software optimally for their unique business needs. Similarly, our software developers need to have this same knowledge to develop software for managing businesses in this industry.

The first half of the document covers the American court system, including lawsuits, cases, roles, and process. The second half of this document covers what court reporting agencies do, and how ReporterBase fits into agencies' workflow.

While we do not cover all aspects of court reporting and related businesses in this document, we thought court reporting agencies, legal videographers, translation services, and other litigation support businesses might find it helpful for orienting their new hires to the industry. And for anyone who might be curious about how they could improve managing their court reporting or other litigation support business, they can compare their current work processes with how the current version of ReporterBase, RB9, manages businesses like theirs.



OFFICE MANAGEMENT TECHNOLOGIES

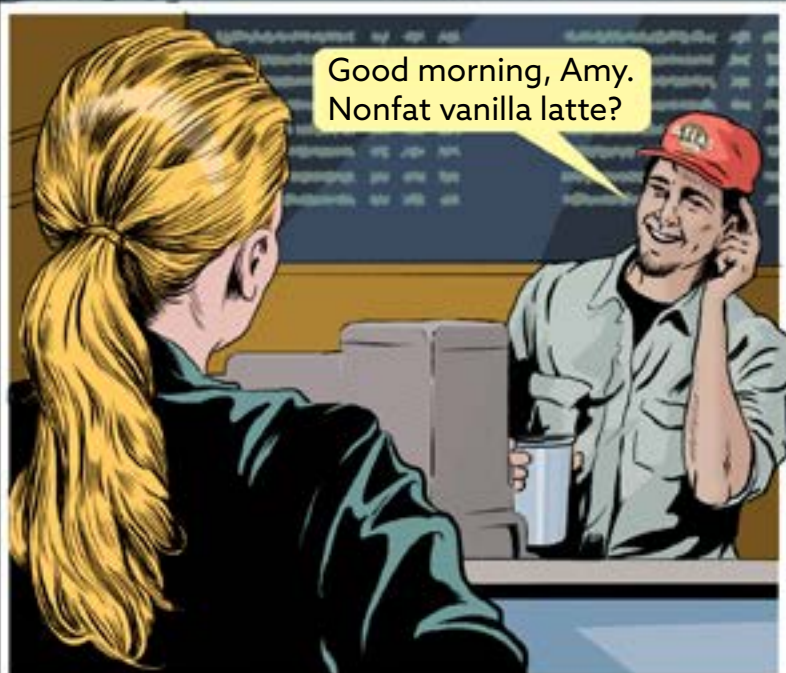
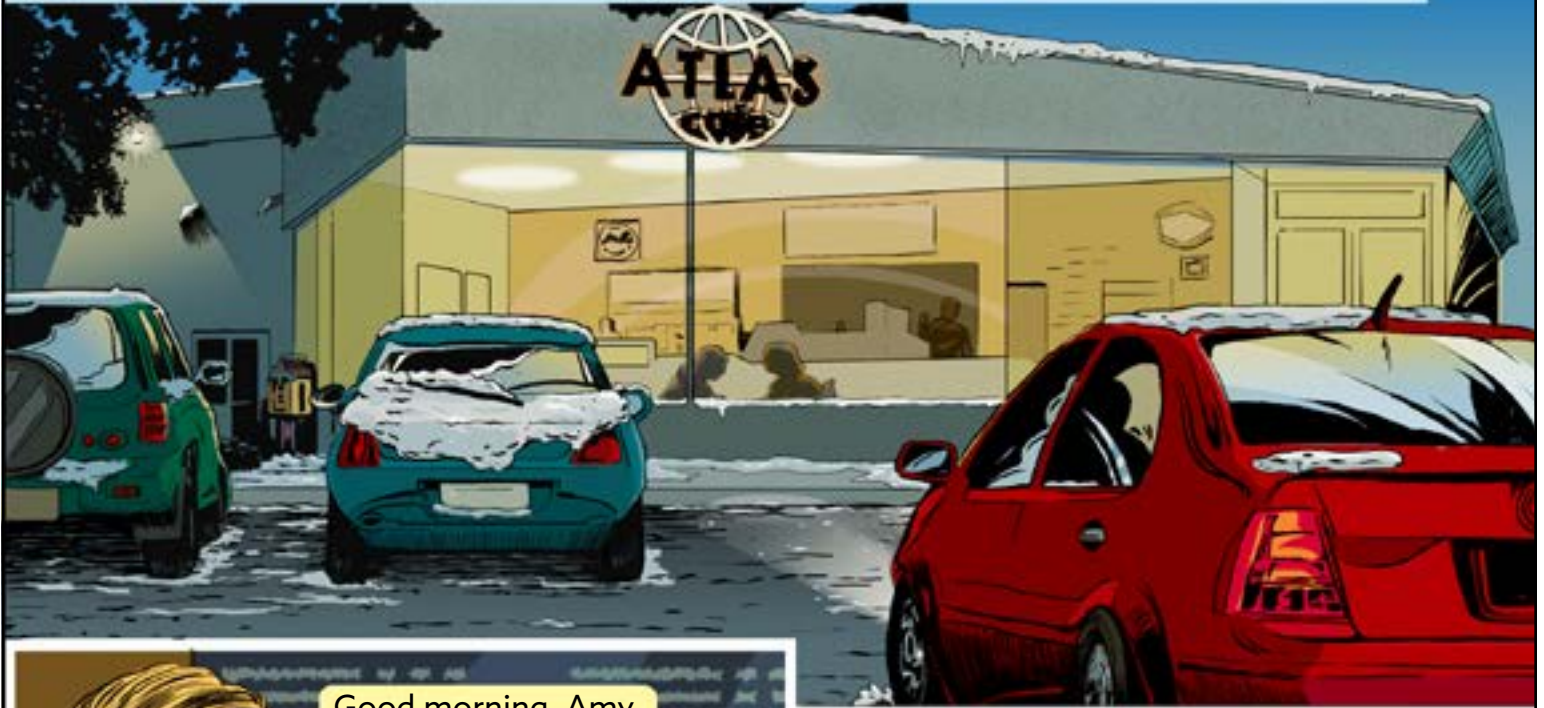
**Developers of ReporterBase**

# ReporterBase & Court Reporting: An Industry Overview

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The Atlas Cafe looked particularly inviting after an overnight snowfall as Amy Nichols drove up for her usual morning coffee.



Thomas greeted her warmly and began preparing her beverage.



Moments later, coffee in hand, Amy turned to leave the cafe. She braced herself against the cold morning air and pushed the door open.



Amy's hands and legs flung suddenly, helplessly outward. A searing flash of pain charged through her body as she fell back hard onto the cold sidewalk.

For a moment, nothing made sense. She could not speak. she could not move. She closed her eyes tightly.



As she was lifted into the ambulance, Amy wondered how she had not seen the patches of ice on the sidewalk.

The paramedics' expressions told her that her injuries must be severe.

That afternoon at the hospital, a doctor told Amy that she had suffered severe fractures in her hip and ankle. The injuries would require surgery and physical therapy. Recovery would be slow, painful and expensive.



In the months that followed, Amy's medical expenses climbed to over \$250,000. She was unable to work because of her injuries and a busy schedule of medical appointments and physical therapy.

Her insurance would only cover a fraction of the expenses, saying that the accident had been the result of negligence on the part of Atlas Cafe. The walkways should have been kept clear of ice and safe for customers.

She was advised to hire a lawyer and file a civil suit against Atlas, so she contacted the law firm, **Berg, Steiner Chapman**.





The attorney explained that there are two kinds of court cases, **criminal** and **civil**.

## Two types of court cases

### Criminal

In a criminal case, **a person is charged by the government with breaking the law and could end up going to jail or prison.** The government, also referred to as the state or prosecutor, is the plaintiff. The person accused is the defendant.

### Civil

In a civil case, **one entity sues another.** It could be an individual or a company. No one goes to jail, but the government supports the winning side. **The plaintiff in a civil case is the one suing and the defendant is the one being sued.** Some examples of civil cases include automobile accidents, wrongful job termination, business disputes, fraud, non-payments, and dog bites.

In each type of case, both sides present their arguments in front of a judge and possibly a jury.

## Alternatives to civil court cases

Civil cases are not always tried in a court of law. Alternatives include settlement, arbitration, and mediation.

### Settlement

Usually a cost-effective alternative to a trial, a settlement is an **agreement between the parties involved** in the suit (the plaintiff and the defendant) that resolves the suit. A settlement can be discussed by any party at any time during litigation.

### Arbitration

The two parties could also agree to resolve their dispute through arbitration, where a **third party reviews the evidence in the case and imposes a decision that is legally binding** on both sides and enforceable in court.

### Mediation

The parties might also opt to **negotiate a settlement with the help of a neutral party called a mediator.** In mediation, neither party has to agree on a settlement, and if they cannot reach an agreement, they will then proceed to trial.





## Court reporters

Court reporters are an integral part of the legal process, **documenting what occurs in legal proceedings**. Court reporting agencies manage court reporters and other legal support staff.

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**Court reporting agencies work mostly on civil cases.**

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## Law firm roles

### Legal secretary

A legal secretary **performs administrative duties**, including transcribing reports, filing and organizing them, performing general office duties, providing customer service, and generally assisting lawyers and paralegals. Often, legal secretaries report to and are assigned tasks from lawyers and paralegals.

### Paralegal

Having more legal training than a legal secretary, a paralegal **handles more legal tasks and reports directly to the lawyer**. Paralegal duties include interviewing people involved in the case, preparing case summaries, researching and documenting cases, and doing general case management. In smaller firms, paralegals may also take on administrative and management duties.

Like legal secretaries, paralegals are not attorneys, so they are not allowed to perform certain tasks. For instance, they can't give out legal advice or represent a client in court, but they can assist an attorney in court.

### Lawyer/Attorney

A lawyer or attorney is a **professional who represents clients in a court of law**, gives legal advice, and acts on behalf of clients in legal matters, such as negotiating and drafting contracts, drafting wills and trusts, and protecting intellectual property rights (patents, trademarks, and copyrights).



# The case process

## Intake Interview

When someone contacts a lawyer about a legal matter, the first step is usually an intake interview in which **the lawyer gets to know the client**, clarifies what the goal is, begins to develop claims (if the client is the plaintiff) or defenses (if the client is the defendant), and explains their fees to the client. If the client and the attorney agree to proceed, the lawyer will have the client sign a contract for services.

## Discovery

Before appearing in court, **lawyers and their paralegals research the case** and prepare the necessary legal papers. This is known as the discovery phase.

## Depositions

Part of this process involves **interviewing, under oath, anyone who has information related to the case**. The witness's sworn statement, recorded by a certified court reporter, is called a deposition, or depo for short. In most instances, a trained court reporter called a stenographer, uses shorthand on a special machine to type a record of what is being said.

Sometimes the deposition is documented using **video or audio recordings**.

There is another way to record depositions called **Verbatim Reporting** or **Voice Writing**, in which the court reporter doesn't type the proceedings, but instead relays the information verbally into a specialized microphone mask. Voice writers repeat everything that occurs during a proceeding including gestures and emotional reactions. Then they use speech recognition software to convert their aural recordings into written words.

Depositions are taken to let litigants (plaintiffs and defendants) and their attorneys **learn in advance what information a witness has** that might help or damage their case.

While similar to testifying in court, **a deposition does not take place in court**. It usually takes place in a lawyer's office or at a neutral location like a court reporting firm's conference room. Depositions can be taken in person or remotely via video conferencing.

Lawyers from each side (or party to the lawsuit) may be present and can ask questions. When a lawyer who is on the same side as the witness asks questions, it is called **direct-examining**. When a lawyer from the other side asks questions, it's called **cross-examining**.

If the witness might have trouble understanding the proceedings due to language barriers or hearing impairment, a **translator/interpreter** will be included in the deposition to translate the lawyers' questions and the witness's responses.

After the deposition, **the court reporter prepares a written record (transcript) of what was said** in the deposition (testimony). It usually takes several weeks for the transcript to be completed, including having the witness review and sign the transcript. Both sides in the case receive a copy.

# The Court Reporting Agency Process

## Agency services

Our clients' work starts when a secretary or paralegal from a law firm contacts them to request a reporter and/or other professional(s) to cover a depo. **Our clients are in the business of providing the services of professionals to handle a job.** The service is usually a court reporter to record the deposition. But our clients are not limited to court reporting. Other examples of the types of jobs they cover include videography, video conferencing, interpreting, voice writing, and transcription.

Our clients might also provide a conference room or other space for recording depositions or for video conferencing if the job involves witnesses or lawyers who are not going to be onsite. Our clients also can host Zoom or other types of online meetings for depositions. While the processes and workflows we are describing here are typical for court reporting agencies, they also apply to other legal support businesses that use ReporterBase.

Our clients use **RB9** to schedule services, host Zoom meetings, manage clients and resources, produce products (such as transcripts), bill clients, pay resources, receive payments, document activities in reports, and do other miscellaneous tasks.

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**Resources are court reporters or other legal support professionals, like videographers or interpreters, but can also be other entities, like another court reporting agency or a conference room.**

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Our clients use **RB Connect** (formerly RB Web) and **RB Connect Mobile** to provide services to clients and resources online or via mobile devices. Services to clients include scheduling, calendar lookup, transcript orders, invoice lookup, online payment, interactive transcripts (Transcript Packages), file downloads, reward point redemption, and support tickets. Services to resources include calendar lookup, job acknowledgement, current To-Do list, online job turn-in, pay statements and invoice lookup, file downloads, master word lists for transcripts, schedule lookup, time-off requests, firm lookup, and support tickets.

(Some of our clients use **RB Lite** instead of RB9 to manage their business. RB Lite includes about half of the functions in RB9, mainly scheduling and billing functions. It does not work with RB Connect, RB Connect Mobile, or any other RB9 plug-ins. References to RB9 functions in this document include RB Lite unless otherwise noted.)

## Scheduling

### New job request

During the **initial phone call**, the court reporting agency promptly takes down the job details: the key being to get the client off the phone as quickly as possible. Legal secretaries or paralegals might also **make job requests via email, fax, or online** (if the court reporting agency has RB Connect).

## Job entry into calendar

The **calendar person** at the court reporting agency enters the job into the agency's calendar. (If the job request came in via RB Connect, the job information is automatically entered into RB9.) The law firm will also send the court reporting agency a **notice**, which will have all the pertinent job information including **date, time, client name, case, and location of the job**. That notice is uploaded to the **job-level repository** in RB9 so it can be passed along to the assigned reporter or other resources.

The calendar person can **enter additional job information into RB9 as it becomes available**, such as witness, location, and case information from the notice. If the job is part of an on-going case, the calendar person can add the new job to the case, and **case information** such as parties to the case and case files in the repository will **automatically fill into the job**.

Before assigning resources to a job, the calendar person lists the tasks that will be required for the job based on the services requested by the client, such as depo, interpreter, video, conference room, etc. With all of the tasks in the job, **if the job is canceled, the tasks are canceled too**, and nothing gets overlooked. Or **if the client cancels only one aspect** — they don't need interpreting, but the rest of the job is a go — **the calendar person cancels only the one task; it doesn't affect the rest of the job**.

For services the agency will bill separately, such as video done by a third party of a depo the agency will handle, the calendar person will set up a linked job instead of a task. **Linked jobs are separate jobs on the calendar, that can be billed on separate invoices**. But because they are tied to each other, the calendar person will be notified when a depo is canceled that there is a linked video job, so they can cancel the video job too and notify the videographer.

## Assigning resources

At this point in the process, some agencies **pre-assign** their calendar, meaning they assign resources to scheduled jobs a couple of weeks before the jobs actually occur. Agencies who pre-assign resources are able to map out their calendars to make sure they are assigning resources fairly. **Pre-assigning jobs is not always final**. Resources can be removed from jobs and others assigned, depending on what the agency wants to do. Or a depo might be cancelled or the case settled, negating the need for further depositions. Resources can be notified at the time assigned, but we recommend RB9 users wait until the client confirms the calendar before notifying resources because if that assignment changes, then the resource might question the reason.

## Calendar confirmation

Our other clients assign resources to jobs the day before the job is scheduled to take place. First, the agencies confirm their calendars starting the morning of the day before the job. Confirming the calendar means contacting the clients who requested services for the next day to **make sure those jobs are going forward**. Calendar confirmation usually takes place via phone calls or email.

## Resource notification

In court reporting, a lot of clients cancel daily, so it's not uncommon to see a lot of cancelled jobs on our clients' RB calendar. Once all jobs for the next day are confirmed, the agency assigns resources to the jobs that are going forward, then they notify those resources that they have jobs for the next day. Agencies can notify each resource as they are assigned, or send out the notifications in batches. **Notifications** are usually sent to resources from RB9 using **email, worksheet printouts, and text messages**.

Sometimes a law firm will call in a job request at the last minute. The calendar person can use RB9 to **send email and text-message blasts to a group of reporters and other resources instantly**. The calendar person sets the parameters for which resources to blast, such as proximity in miles to the job location and specialties requested. Then the first person in the blast group to respond gets the job. *(This function is not available in RB Lite.)*

## Job acknowledgement

When a resource receives a notification, they reply to acknowledge the job. Job acknowledgements can be done **via phone, email or** if the agency has RB Connect, the assigned **resource can log into RB Connect to acknowledge the job** on their own calendar.

## Calendar management tools

RB9's Calendar also includes tools for managers and owners to **monitor different aspects of their agency's job schedules**. They can audit jobs scheduled and canceled within a date range, analyze job settings to see who are their best and worst clients *(not in RB Lite)*, review assigned tasks to see if any resources have too much on their plate and if work is being distributed fairly *(not in RB Lite)*. They can also print out the job calendar if they want a hard copy for any reason.

# On the job

## Taking the deposition

Once the job is confirmed by the client, the next 8-10 days are all on the resource. The day of the job, **the resource appears at the deposition location with their stenography machine** and performs their duty as a court reporter, **transcribing the deposition**. During the course of the deposition, **documents or objects, referred to as exhibits**, might be presented by the attorney as evidence in the case. The court reporter takes possession of the exhibits, which will be copied and appended to the final transcript by the court reporting agency.

## Copy orders

After the deposition is complete, the resource asks **which of the attorneys present (parties) would like to order copies of the transcript**, then gives each ordering party an order copy form to fill out. The order copy form is the agency's proof that the client ordered a copy of the transcript. It's not uncommon in the industry for copy clients to deny having ordered a copy and decline to pay for it.

## ASCII

The court reporter prepares an **ASCII (an encoded text format) file of the transcribed proceedings (transcript)**. The reporter proofreads this transcript so when they submit the ASCII file to the court reporting agency, it will have minimal or no mistakes.

## Turn-In

**Along with the ASCII file and any exhibits, the reporter will send a billing sheet** to the court reporting agency. The billing sheet lists the name of the witness who was deposed, the number of pages in the transcript, who is ordering, and what they are ordering. This package is usually turned in by hand, via email, or via RB Connect's online turn-in. Most agencies give their resources 8-10 business days to turn in their jobs to the agency's office, although some jobs are rush and require a faster turn-around.

# The end product

## Production

Once the ASCII file, exhibits, and billing sheets are received by the agency, the **production department enters the information** into RB9 Production > Turn-In, **uploads the ASCII file and exhibits, and produces the products** for the ordering client according to what they requested on the order copy form and any standing orders the client maintains with the agency. (For example, some lawyers always want a printed transcript in a binder.)

Products might include copies of the ASCII transcripts and exhibits, a **PDF version of the transcript with linked exhibits and digital signatures, or a browser- and mobile-friendly version (Transcript Package), a condensed transcript** (a reduced-page version of the transcript accomplished by shrinking individual pages so they are small enough to fit 2 or 4 transcript pages on a single page), video or audio versions, and other items. The production staff uses RB9 to create full-size and condensed PDF transcripts, including word lists and word indexes, and Transcript Packages. *(PDF transcript production and Transcript Packages are not available in RB Lite.)*

Depending on what was ordered, the products are then shipped/mailed to the ordering clients, and/or if they have RB Connect, uploaded to the repository and the client notified. The production department can **print cover letters, envelopes and labels, including FedEx and UPS labels, and track shipping within RB9 (but not RB Lite)**. If the client wants to **view/download files from the repository as soon as they are uploaded, they can pay in RB Connect** using their credit card and have instant access. (Transcript Packages are only available on RB Connect.)

## Production management tools

RB9's Production module includes tools for tracking and managing the flow of products and to provide additional services. Production Sheets tell staff what service items and how many to produce for turned-in jobs. Send Originals Out tracks the location of original transcripts, affidavits, and errata sheets. Documents linked to a case, job, witness, firm, contact, location, resource, or all resources are stored in their related repository. Tracking monitor jobs as they move through the production workflow, including the location of physical media. And production can generate Master Word Lists spanning multiple transcripts belonging to a case to give to reporters for related jobs, instead of access to all of the previous transcripts.

## Billing services

Once the product has shipped, the billing department can produce the invoice from the information recorded in Turn-In and send it to the client. **RB invoices can be mailed, emailed, and/or uploaded to RB Connect**. Electronic versions of RB invoices can be produced in **LEDES format, which can then be imported directly into clients' billing systems**. Invoices in RB Connect can be **paid electronically**. *(LEDES invoices not available in RB Lite.)*

## COD

If a client's status is **COD (Cash on Delivery)**, the steps are reversed: the client is billed first, and the product is not shipped until payment is received. If the agency has RB Connect, they can give clients the ability to **pay COD invoices online, so clients can download files as soon as they pay**.

## Receiving payment

In RB9 Receivables, the agency monitors open invoices (**Accounts Receivable**), makes adjustments to invoices as needed, generates finance charges, and applies payments to invoices as received. If the client has a retainer (fee paid in advance) in their account, it will appear automatically so it can be applied to an invoice. They can email or print out statements for outstanding amounts and include the related invoices.

They also use the collection tools in RB9 **when making calls to clients about overdue invoices so they have all details** about the services rendered, charges billed, and other details on hand to answer any questions and resolve disputes. They can **document their collection efforts and use follow-up alerts** to stay on top of overdue invoices until paid. *(Collection tools not available in RB Lite.)*

## Billing & receivables management tools

RB9 includes **reports for managers and firm owners to monitor billing and receivables**, such as daily sales, accounts receivable balances, and clients' monthly activity, plus **reports to provide to others**, such as resources' earnings for a particular time period, and monthly journals for the agency's accountants. *(Not all reports are available in RB Lite.)*

## Paying resources

The flip side of receiving payments from clients is paying the resources that have done the work. Some agencies only **pay resources after the agency has been paid** for the job. Others **guarantee payments for the original transcript**, but wait to pay for copy orders until they have received payment from their client. Some **guarantee payment to their best resources**, but not their other resources.

In RB9 Payables, the agency manages payments to resources for jobs, making pay adjustments when necessary and sending pay statements. The agency can **print payroll checks, export them to QuickBooks, or direct-deposit checks** to a resource's bank account. *(Pay-check functions not available in RB Lite.)*

## Payables management tools (RB9 only)

Managers and firm owners can **issue 1099 tax forms, pay and track bonuses and commissions, and monitor sales tax** amounts generated. They can also generate reports on overall outstanding payables or broken down by resource.

Agencies can **reward customers with points like airlines and credit cards do**, based on the business generated by their job requests. If the agency has RB Connect, they can allow their clients to transfer or redeem points online.

## Other RB9 processes & services

RB9 includes additional functions to handle other business matters or extend main functions.

### Inquiry

Functions under Inquiry are used to **locate information in RB9's database**, such as a particular invoice, the list of deponents from a case, or how much the agency owes a resource. An agency can **generate a settlement amount for a particular case in seconds**, no matter how long the case has been going on, then send the client a PDF of their invoices. There are also functions for analyzing different business aspects, such as resource productivity.



## Reports (RB9 only)

Like all businesses, court reporting agencies use reports to understand and document different aspects of their business, such as productivity and profitability. In addition to the narrow focused reports in Calendar, Receivables, and Payables, **agencies can generate reports about their business's overall health**, such as sales and gross profit comparisons for different time periods. They can see breakdowns of billed services, who their best clients are by invoice totals, amounts billed to 3rd parties like insurance companies, and resource and production staff productivity and efficiency.

Some reports are static reports; other are **interactive which allow the user to drill down for more detail**.

## Entities

RB9 stores rich profiles of entities related to court reporting agencies. Entities in RB9 include individuals, businesses, places, and discrete parts of court reporting agencies, such as revenue centers or branch offices:

- **Firms** are entities that do business with an agency, such as law firms, other court reporting firms, vendors, insurance companies, corporate clients, and courts. Firm information stored in RB9 includes complete contact info; firm preferences; staff listing; scheduling, production, and billing info, including collection records; and files stored in the repository. Information can include firm status, such as COD, warnings about the firm, and marketing information, such as credit rating and the sales rep handling the firm. Firm listings also include a log documenting actions taken by the agency related to the firm and graphs that visualize the firm's scheduling and financial activity with the agency.
- **Contacts** are individuals who work for firms, such as attorneys, paralegals, secretaries, legal assistants, claim adjusters, and court clerks. Contact information stored in RB9 includes the same type of information as for firms, plus online access granted through RB Connect and personal info, such as anniversaries and reward points status.
- **Resources** are entities who provide court reporting agencies with a service or support, such as reporters, videographers, interpreters, scopists, and account executives (sales reps). Resources do not have to be individuals. They can be other reporting agencies that cover jobs for an agency, or an agency's conference rooms. Resource information stored in RB9 includes similar information as for contacts, plus info related to digital signature proxy (for applying the resource's digital signature to RB-PDF Transcripts and Transcript Packages), pay, work schedule, and certifications/qualifications.
- **Locations** are places where jobs take place, such as court rooms, law offices, and an agency's conference rooms. In RB9, law firms and courts are Firms, and agency conference rooms are Resources, so the Locations table is for other types of locations where jobs occur, such as private residences, doctors' offices, or schools. Location information stored in RB9 includes contact info, directions, a log documenting actions taken by the agency related to the location, and files stored in the repository.
- **Business Units (BU)** are an agency's revenue centers or any entity that the agency wants to track separately, such as branch offices, other companies they own, affiliates, and profit-sharing operations. BU information stored in RB9 includes contact, legal, website, financial, and business account info, plus company logos and default task deadlines.

**NOTE:** RB9 users are not entities in RB9. Instead, they are entered into the system in the Setup module's Users and Groups function.

## Tools

RB9 includes tools that extend other functions:

- **Bulk Import** allows users to import existing client (firm and contacts) and reporter/resource information into RB9, instead of re-keying. (*Available in RB Lite.*)
- **Bulk Update** provides a way to change a number of entities (firms, contacts, resources, locations, and jobs) that need the same information changed all at once. (*Available in RB Lite.*)
- **Tag Manager** allows users to manage the tags they use to organize entities, plus print labels for mailings or email tagged entities.
- **Form Templates** is used for creating and managing forms and letters. Like Microsoft WordPad, it's a basic word processor, but it includes data merge fields and is designed to work with RB9 functions. (*Available in RB Lite.*)
- **Label Templates** stores templates created in DYMO software to use in RB9 functions that print labels using DYMO printers.
- **Notes Finder** is used to search the various Notes Logs in RB9 for notes entered by either users or the system.
- **Repository Download Log** is used to track file download activities performed by in-house staff, clients, and resources via RB Connect.
- **Download Backup File** lets users download backup copies of their RB database.
- **Email Log** keeps copies of automatic emails sent by RB9 so you have a paper trail.
- **Query Maker** is used for creating custom reports from an agency's RB9 database.
- **QuickBooks Integrator** streamlines the integration of RB9 data into *QuickBooks*, a popular accounting package used by many court reporting and other legal support businesses.

## Plug-ins (RB9 only)

In addition to RB9's over 130 functions, court reporting agencies can subscribe to RB9 plug-ins to add optional functions to their ReporterBase system.

- **RB Connect** is the most common add-on to RB9. With it, RB9 users give their clients, reporters and other resources secure online access to essential information in RB9, such as their schedules, job locations, transcripts, and billing information.
  - **Through RB Connect, contacts can:**
    - Check their upcoming depositions, plus see at a glance which depositions have been canceled.
    - View details of a deposition, including map directions.
    - Request a deposition using an existing request and updating it, or from scratch.
    - Reschedule or cancel depositions.
    - Upload notices.
    - Back order a transcript.
    - Check their current outstanding balance.
    - View invoices and pay bills. COD clients can download transcripts after paying online.
    - Use interactive Transcript Packages, including exporting different versions.
    - View and download transcripts and case files, including streaming video.
    - Back order transcripts.

- Transfer and redeem loyalty points.
- Get support.
- **Through RB Connect, reporters and other resources can:**
  - Check their job calendar. If they are a sales rep or have their own clients, they can also see which jobs their clients have scheduled.
  - Acknowledge jobs.
  - See at a glance the status of any job, including which jobs have been canceled.
  - View job details, including map directions and notes about the client.
  - Check in at job locations.
  - View their To-Do lists.
  - Turn in jobs.
  - Upload and download files. Can automatically number exhibits when uploading.
  - See which jobs have been billed, what has been paid and what they are owed.
  - View an invoice's pay details.
  - Get current and past pay statements.
  - Create master word lists for jobs on a case.
  - View their schedule and request time off.
  - Look up firm and contact information including location and direct phone numbers.
  - Get support.
- **RB Connect Mobile** gives RB9 users' clients, reporters, etc. secure access to RB9 through a mobile-optimized site. It requires RB Connect and provides the same functionality, except clients can't upload notices and resources can't turn in jobs or create master word lists.
- **Data Reader** gives RB9 users the ability to use their RB information in their own custom reports or other applications.
- **Full-Text Search** gives RB9 users' clients the ability to quickly search for specific text across files in RB Connect repositories and Transcript Packages. It requires RB Connect.

### Custom programming (*RB9 only*)

OMTI offers a custom report service for clients who need a specific report that is not available in RB9 and who are not able to write their own using the included Query Maker tool or the Data Reader plug-in. Reports are written in *Crystal Reports 10*.

## How RB9 works

RB9 is a web-based application for managing court reporting agencies and other litigation support businesses. There is nothing to install locally, and it is accessed through a browser. All that's needed to use RB9 is a desktop or laptop computer. It can even be used on tablets.

The server and repository reside on Microsoft Azure's Cloud Services. Microsoft Azure's AlwaysOn Availability and Azure Locally Redundant Storage provide better-than-backup data and file protection, and Microsoft guarantees 99.95% uptime.

Users subscribe to RB9 or RB Lite on a monthly basis, switching between the two services with no loss of data, and adding and subtracting user licenses and additional services as needed. There are no long-term financial obligations.

# About OMTI

OMTI is a privately held company that develops business management software, web services and mobile apps for court reporting agencies, record retrieval companies, and other litigation support businesses. Hundred of legal support companies, mainly in the US and Canada, use OMTI's products and services on a daily basis. OMTI clients range from national syndicates to one-person shops.

OMTI was founded in 1985 by Yong Lee as RB Software Inc., and its flagship product is ReporterBase, which is used by court reporting agencies, legal videographers, interpreting companies, and other litigation support businesses. The current version, RB9, was released in 2018 and provides business management functions for this unique industry through Microsoft Azure's cloud platform.

Cloud-based solutions are the latest evolution of software and offer significant advantages, including the ability to deploy new features and bug fixes to all clients' RB systems automatically and simultaneously; the elimination of server hardware, software, and IT staff, saving clients money; and better system safety and integrity than what clients can do themselves. To reassure clients of our systems' security, OMTI is SOC 2 Type 2 compliant.

OMTI's products and services are available by subscription only. Subscriptions provide OMTI with stable income and pay for all product development and support. Desirable features like PDF transcripts, online case repositories, mobile apps, and e-commerce were made possible by clients' subscriptions.

The success of OMTI's business model can be measured in both the continued significant growth in subscriptions, and the long-term loyalty of OMTI's customers — many have grown with the company since its beginnings, and companies that start using OMTI products overwhelmingly stay with OMTI products. OMTI values its customers, actively seeking their input on new solutions to their business problems and providing forums for information sharing and networking, such as a customer portal and user conferences.

OMTI is headquartered in Southern California, with an office in Seoul for product development and a Northern California office which handles marketing. All of the principals in the organization have been with OMTI for more than fifteen years.



OFFICE MANAGEMENT TECHNOLOGIES

## Developers of ReporterBase

For more information about OMTI, RB9, RB Connect, RB Connect Mobile, and our other services, visit [omti.com](http://omti.com).

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