RB Web 8 online office for reporters, sales reps and other staff

User Guide

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Appendix A

Appendix B

OMTI, Inc.
2901 Wilcrest Dr., Suite 211
Houston, Texas 77042

Program Basics

Logging in

Sign in to view your calendar, check account activity, get your pay statements, download shared case files and turn in jobs.

1. In the Log-In screen, enter your assigned user ID and password.

2. Click **Log In** (or press the **Enter** key).

Program Basics

Navigating the site

Within RB Web, access the main areas, such as your account activity or job calendar, by clicking the buttons in the navigation bar near the top of the screen.

NOTE

Access this manual online by clicking **Help** in the navigation bar.

Program Basics

Exiting the site

Whenever you are logged in and have not clicked anything for 20 minutes, you are automatically disconnected from the site. Instead of letting your time expire, log out when you have finished by either:

- Clicking **Log Off** in the navigation bar to return to the Log-In screen, or

- Closing your browser window.

Calendar

Viewing your job calendar

Look up individual jobs assigned to you in a calendar as current as the one in the office. You can set your calendar viewing preferences, such as whether you want to see jobs in a list or monthly calendar format, and RB Web remembers them the next time you sign in. The monthly calendar format makes it easy to see which jobs have been cancelled, turned in or billed.

1. Click **Calendar** in the navigation bar.

2. In the Calendar screen, your assigned jobs for the current month appear. You can choose a **View Style** in the drop-down:

   - **Calendar** – To see jobs a month at a time.
   - **List** – To see jobs in a list format.

3. If you have the option, you can select one of the following in the **Calendar Type** drop-down:

   - **Assigned** – View your assigned jobs, including those that have been turned in, billed or cancelled.
   - **Client Of** – If you have your own clients, view their pending jobs so you can request the assignments. (See “Appendix B: Requesting assignments” for more information.)
   - **Sales Rep** – If you are a sales rep, view your clients’ scheduled jobs.

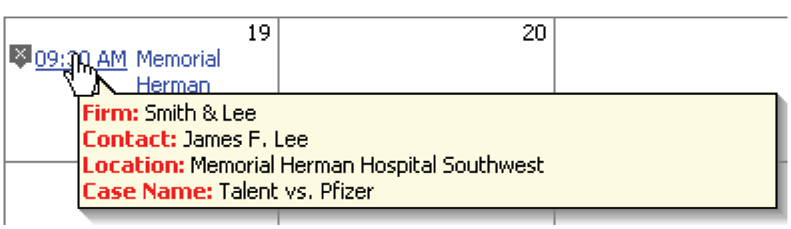
4. Limit the jobs shown by selecting one or more search filters in the **Search Criteria** pane:

   - **Job Date** (List View only)– To find jobs for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Case** – To find jobs for a specific case, enter part of the case name into the field.
   - **Firm** – To find jobs for a specific firm, enter part of the firm’s name in the field.
   - **Scheduled Date** – To find jobs scheduled during a specific period, enter beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.

5. Click **Search.**

6. If viewing in calendar format, you can view the next month by clicking the right arrow button. View the previous month by clicking the left arrow button. Click the double arrow buttons to move the calendar one year at a time. If viewing in list format, click the plus (+) sign in front of the firm name to see jobs for that firm.

7. In calendar format, pause the cursor over a job time to see its firm, attorney, location and case name.



Calendar

Viewing assigned jobs' details

Review individual assigned jobs in detail including driving directions by *MapQuest.*

1. To see an assigned job's details, click its job number or job time (highlighted in blue) in the Calendar screen.

2. In the Calendar Detail screen, the information for the job you clicked appears.

3. In the Location section, click the link labeled **View Map** to access *MapQuest* directions.

Location	Harris County Civil Courthouse 301 Fannin Houston, Texas 77002 View Map Contact: Madeleine Clifton (Trial Coordinator)

4. If available, information on resources who were previously assigned to the same case is listed. To contact a resource, click the corresponding email address highlighted in blue.

Previous Resources

Job Date	Witness	Resource	Email
12/5/2006	Hector Gardener, M.D.	Susan Lloyd	slloyd147@aol.com

5. Under **Repository Files**, any files uploaded to the repository for the case or jobs are listed. Click the download (arrow) button next to the file you want to view or download.

6. Click **Back** (located at the bottom of the screen) to return to the Calendar screen.

TIP

If you would like a hardcopy of the job assignment worksheet to take with you, click **View Worksheet.** Depending on your browser, you might receive an automatic PDF download of your worksheet. Otherwise, in the Print Preview window, click the Print icon.

Calendar

Acknowledging job assignments

When you receive an instant text message on your cell phone or an email from the office notifying you of a job assignment, you can acknowledge the assignment in three ways:

1. Log into your calendar on your cell phone or other wireless device, select the job and click **Acknowledge.** (See “Accessing your calendar on a wireless device” for more information.)

2. Click **Reply** in your email program (such as *Microsoft Outlook)* to send a reply to the email sender (office).

3. Log into RB Web. In the Calendar screen, search for the job you want to acknowledge. Then click its job number or job time (highlighted in blue) to display details. In the Calendar Detail screen, click **Acknowledge** (at the bottom of the screen).

Calendar

Estimating pages and delivery dates

After taking a job, let the office know your estimated page count and delivery date. You can also enter personal notes concerning the job. These notes are for your reference only and cannot be accessed by anyone else.

1. In the Calendar screen, search for the job you want to estimate. Then click its job number or job time (highlighted in blue) to display details.

2. Under Estimated, enter the following applicable information:

   - **Estimated Pages** – Enter your page count estimate.
   - **Estimated Delivery Date** – Click the calendar button and select your estimated delivery date in the Date Navigator.
   - **Personal Notes** – Enter notes to yourself about the job, such as the clothes you wore.

3. Click **Save.** Or click **Back** to go back to the Calendar without saving your changes.

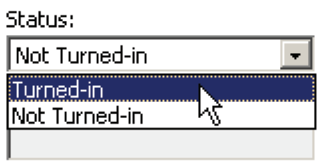
Turn-in

Turning in jobs

The Turn-in wizard guides you through seven easy steps for entering billing information and uploading files.

1. Click **Turn-in** in the navigation bar.

2. In the main Turn-in screen, jobs you are still working on (i.e., not turned in) appear in chronological order with the oldest first. To change the order of the jobs, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order. If you're turning in a job that was previously turned in (e.g., back order), select Turned-in in the **Status** drop-down. Then search for the job using either its job number or job date.



3. Click a job number to begin.

4. In the Edit Job screen (step 1), enter the following applicable information:

   - **Case Name & Case No.** – If the option has been enabled by the office, you can edit the case information.
   - **Rush** – Select **Yes** if this is a rush job.
   - **Notes for this job** – Enter special notes about this job. Do not enter notes for each witness here. (See "Adding witnesses" for more information.)

5. Click **Next.**

NOTE

In each step, you can click:

- **Next** – To save your changes and go to the next screen.
- **Cancel** – To return to the main Turn-in screen.
- **Back** – To go back to the previous screen.

Turn-in

Adding witnesses

Enter information about witnesses. There is no limit to the number of witnesses you can enter for each job.

1. In the Add Witnesses screen (step 2), click **New.**

2. Under New Witness, enter the following applicable information:

   - **Witness** – Witness name. If there are no witnesses, enter the description, such as “Proceedings” or “Hearing,” in this field.
   - **Pages** – Total number of pages.
   - **Begin Page** – Beginning page number. The default is “1.”
   - **End Page** – Ending page number is calculated automatically.
   - **Volume** – Volume number. The default is “1” if the beginning page number is “1.”
   - **Last Exh. Marked** – Number of the last exhibit marked for this volume.
   - **Actual Start Time** – Actual time the job started.
   - **Actual End Time** – Actual time the job ended.
   - **Send Original To** – This field keeps track of the original transcript. If the original remains in the office, leave it blank.
   - **Notes for this witness** – Provide detailed instructions for the production and billing departments for this witness.

3. Click **Save.**

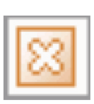
4. Repeat steps 1 through 3 to add additional witnesses.

5. Click **Next.**

NOTE

You can revise the information about a witness by clicking the edit (pencil) button. Or delete a witness by clicking the delete (X) button.


Edit button


Delete button

Turn-in

Uploading files

After adding witnesses, upload all related files (such as page-image ASCII files) you would normally email to the office.

1. In the Upload Files screen (step 3), click **New.**

2. Under New File, enter the following applicable information:

   - **Witness** – Select a witness in the drop-down.
   - **File Name** – Click **Browse** to locate the file.
   - **File Type** – Select a file type in the drop-down.
   - **Description** – Enter any text describing this file. If this file is published by the office, the description will be visible to clients on RB Web.

3. Click **Save.** A progress bar appears at the bottom of the screen.

4. Repeat steps 1 through 3 to upload additional files.

5. Click **Next.**

NOTE

You can revise the information about a file by clicking the edit (pencil) button. Or delete a file by clicking the delete (X) button.

Turn-in

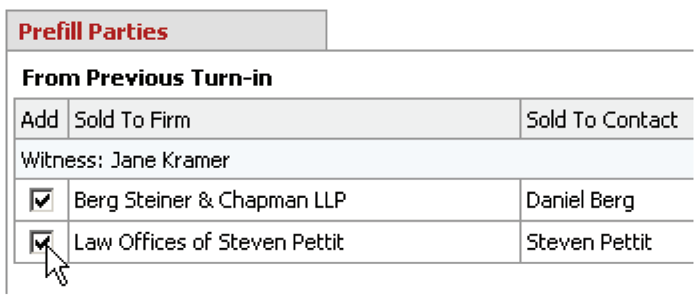
Adding ordering parties automatically

After uploading files, the next step is to enter ordering parties. For each *party* entered here, RB8 will generate one invoice. Instead of entering one party at a time as before, add all the parties who are ordering with a single click using Prefill Parties**.** You can obtain the list of parties from the case, job or previous turn-in.

1. In the Add or Prefill Parties screen (step 4), click **Prefill Parties.**

2. Under Prefill Parties, click the **Add** checkbox next to each party you want to add. You can pick and mix parties from all three areas:

   - **From Previous Turn-in** – If you have turned in at least one other job on this case previously.
   - **From Job** – If the calendar department entered the parties when scheduling the job. The scheduling (noticing) party is always listed here.
   - **From Case** – If this is a managed case and all the parties have been set up at the case level.



3. Click **Save.** The selected parties are automatically added. By default, orders (step 5) and service items (step 6) are created for these parties simultaneously.

4. Click the edit (pencil) button next to the party who is paying for the original.

5. In the Edit Party screen, click the **Original** checkbox, then click **Save.**

6. Click **Next.**

BEST PRACTICES

On the Add or Prefill Parties screen (step 4), always click **Prefill Parties** first. Even though other areas might be empty, you will always find the scheduling party under **From Job.**

Turn-in

Adding ordering parties manually

If this is the first job being turned in on the case that is not managed and no parties were specified at the time of scheduling, you need to add ordering parties (except the scheduling party) manually one at a time.

1. In the Add or Prefill Parties screen (step 4), click **New.**

2. In the New Party window, enter the following information:
   - **Sold To Firm –** Click the lookup (magnifying glass) button to search for the firm. (See “Appendix A: Searching for firms” for more information.)
   - **Sold To Contact –** With a firm selected, all contacts for that firm appear in the drop-down. Select a contact in the drop-down.
   - **Original** – Click the checkbox if the party is paying for the original.
   - **Same as Sold To –** If the billing party is same as the ordering party, click the checkbox.
   - **Bill To Firm –** If the billing party is different from the ordering party, click the lookup (magnifying glass) button to search for the firm to be billed.
   - **Bill To Contact –** With a firm selected, all contacts for that firm appear in the drop-down. Select a contact in the drop-down.

3. Under Witnesses, all witnesses you entered in step 2 are listed and selected. If the party is not ordering a particular witness, clear the **Select** checkbox next to the witness name.

4. Click **Save.** An order for the party (step 5) is created simultaneously.

5. Repeat steps 1 through 4 to add additional parties.

6. Click **Next.**

Turn-in

Editing orders

In RB, an *order* represents one party ordering service items associated with one witness. Orders are always created automatically when you add parties in step 4. If you need to specify an expedite delivery type for an order, you can do so by editing the order in the Add Orders screen.

1. In the Add Orders screen (step 5), click the edit (pencil) button next to the order you want to change.

2. In the Edit Order window, select a rush type in the **Rush Type** drop-down.

3. Click **Save.**

4. Repeat steps 1 through 3 to edit additional orders.

5. Click **Next.**

Turn-in

Entering service items using billing sets

After designating which party is ordering which witness, the next step is to enter service items for each order. Instead of entering one service item at a time manually, you can select one of the predefined billing sets to add several service items at once.

If you have ever ordered a combo meal at a fast food joint or a bento box lunch at a Japanese restaurant, then you already understand what RB8 billing sets are: Pre-set groups of items that speed up the selection process because you only have to choose the set, not all the individual items.

1. In the Add, Copy or Prefill Services screen (step 6), click the Prefill Services (asterisk) button next to the party you want to add service items to.

   
   Prefill Services button

2. Under Prefill Services, select a billing set in the drop-down.

3. All of the service items contained in the selected billing set appear. Click the **Add** checkbox next to each service item you want to add.

4. Under Preferred Services, this party's <u>standing</u> requests, if any, appear. Click the **Add** checkbox next to each service item you want to add.

5. Click **Save.**

6. Repeat steps 1 through 5 for each party. If you have several attorneys ordering copies, you can speed up this process by using **Copy Services.** (See "Replicating copy orders.")

7. Click **Next.**

Turn-in

Replicating copy orders

If you have more than one attorney ordering copies, speed up your turn-in process by copying service items from one order to others.

1. In the Add, Copy or Prefill Services screen (step 6), click the Copy Services (overlapping pages) button next to the party you want to copy service items from.


Copy Services button

2. Under Copy Services, click the **Add** checkbox next to each party you want to copy service items to.

3. Click **Save.**

Turn-in

Adding service items manually

If you have any service items that do not fit into the normal billing sets, add them manually.

1. In the Add, Copy or Prefill Services screen (step 6), click the Add Service (plus sign) button next to the party you want to add a service item to.

   
   Add Service button

2. In the New Service window, enter the following applicable information:
   - **Service Group –** Select a group in the drop-down. The default is Misc. Charge.
   - **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.
   - **Units –** Enter the number of units. The default is “1.”
   - **Split % –** If several parties are sharing the cost of this service item, enter the percentage allocated for this party (e.g., “50.000” for one half or “33.333” for one third).
   - **Remarks –** Enter any comments concerning this service item.
3. Click **Save.**

NOTE

You can revise the information about a service item by clicking the edit (pencil) button. Or delete a service item by clicking the delete (X) button.

Turn-in

Finishing turn-in

Complete the turn-in process by sending an alert to the office. You can also print the billing sheet for your records.

1. In the Finish Turn-in screen (step 7), review the billing sheet shown in PDF format. Click **Back** if you want to make any changes.
2. In the Acrobat Reader window, choose one of the following options in the menu bar:
   - **Save** – To save a copy of the file on your computer.
   - **Print –** To make a hardcopy of the billing sheet.
3. Click **Submit.** The office is notified of your turn-in immediately.

Activity

Viewing financial activity

See at a glance which jobs have been billed and what you are owed. Filter invoices by job date, case name or witness. Review the details of any invoice.

1. Click **Activity** in the navigation bar.

2. In the **Account Status** drop-down, select one of the following:
   - **ALL** – To see all invoices. This is the default.
   - **Next Pay** – To see invoices that will be paid on the next pay day.
   - **Payable** – To see invoices that are still outstanding (i.e., still owed to you)

3. Limit the invoices further by selecting one or more search filters in the **Search Criteria** pane:
   - **Job Date** – To find invoices for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Case** – To find invoices for a specific case, enter part of the case name into the field.
   - **Witness** – To find invoices for a specific witness, enter part of the witness's name in the field.

4. Click **Search.**

5. All potential matches to the information you entered appear. To change the order of the invoices, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order.

6. Click an invoice number (highlighted in blue) for more details.

7. Click **Back** (located at the bottom of the screen) to return to the Activity screen.

Pay Statement

Viewing pay statements

If you no longer receive a hardcopy of the resource payroll report with each paycheck, view and print out your current and past payroll reports on RB Web.

1. Click **Pay Statement** in the navigation bar.

2. In the **Search Criteria** pane, specify the following parameters:

   - **Year** – Select a year in the drop-down.
   - **Pay Date** – After a year is selected, all pay dates for the selected year appear in the drop-down. Select a pay date in the drop-down.
   - **Show Detail** – To see invoices with details, select Yes in the drop-down.

3. Click **Search.**

4. All of the invoices paid on the selected pay date appear. To change the order of the invoices, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order. Sorting does not work when viewing with details.

Accessing shared files

If you are assigned to a job on a case that other reporters have worked on before, you can download copies of their files on the case, such as the word list, dictionary and exhibits, from the online repository. This is also where you can access relevant files that the office has uploaded.

1. Click **Repository** in the navigation bar.

2. In the Repository screen, your assigned jobs for the current month-to-date appear. Limit the jobs shown by selecting one or more search filters in the **Search Criteria** pane:

   - **Case** – To find jobs for a specific case, enter part of the case name into the field.
   - **Job Date** – To find jobs for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Job No.** – To find a specific job, enter the job number.

3. Click **Search.**

4. Click the job number (highlighted in blue) to see the associated files available for download.

5. Under Files, click a file name (highlighted in blue) you want to download.

6. Click **Back** (at the bottom of the screen) to return to the Repository screen.

Repository

Sharing files

If you work on jobs for cases that other reporters work on too, you can upload relevant files, such as your dictionary and exhibits, to the repository for them to share.

1. Click **Repository** in the navigation bar.

2. In the Repository screen, your assigned jobs for the current month-to-date appear. Limit the jobs shown by selecting one or more search filters in the **Search Criteria** pane:

   - **Case** – To find jobs for a specific case, enter part of the case name into the field.
   - **Job Date** – To find jobs for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Job No.** – To find a specific job, enter the job number.

3. Click **Search.**

4. Click the job number (highlighted in blue) you want to upload files for.

5. In the Repository Job screen, click **New.**

6. In the New File window, enter the following applicable information:

   - **File Name** – Click **Browse** to locate the file.
   - **File Type** – Select a file type in the drop-down.
   - **Description** – Enter any text describing this file.

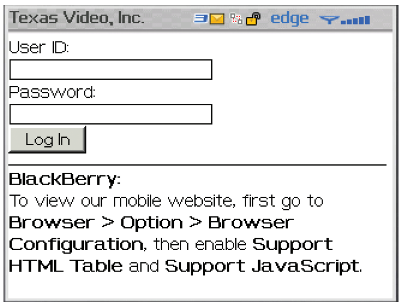
7. Click **OK.**

RB Web Mobile

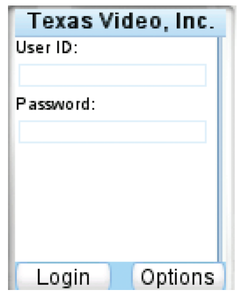
Accessing your calendar on a wireless device

You can check your job calendar and acknowledge jobs by connecting to your regular RB Web URL address over a *BlackBerry,* PDA, or web-enabled cell phone. RB Web automatically detects the device and displays your information correctly. If you are on route to a job and need directions, you can get *MapQuest* directions with a single click.

1. After entering RB Web's URL into your wireless device, the Log-in page appears. Enter your user ID and password, then click **Log In.**

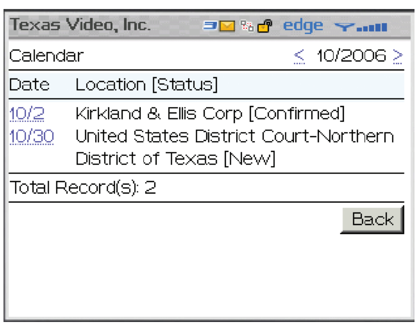


BlackBerry Log-in



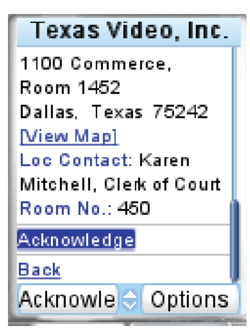
Cell Phone Log-in

2. After logging in, click **Calendar** to display all of your jobs for the current month. Navigate to other months by clicking the arrows at the top right of your screen.



3. Click an underlined date to view its job information.

4. In the Job Information screen, click **View Map** to go to *MapQuest* and get directions to the location.



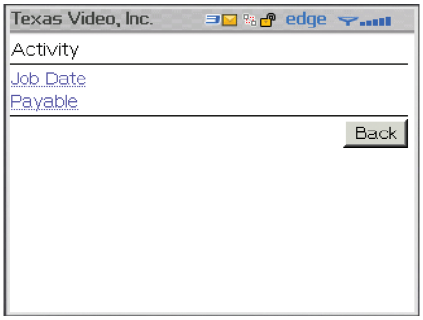
5. If you are assigned to a new job and want to acknowledge the job, click **Acknowledge** to send a notification to the office.

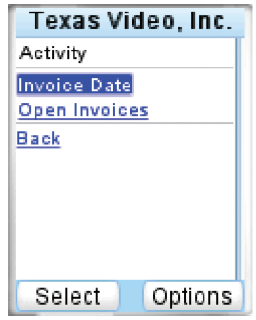
RB Web Mobile

Viewing your payables on a wireless device

You can see which of your jobs have been invoiced and which invoices have been paid by connecting to your RB Web via a *BlackBerry,* PDA, or web-enabled cell phone.

1. After logging into your regular RB Web URL on your wireless device, click **Activity.** Links for **Job Date** and **Payable** appear.

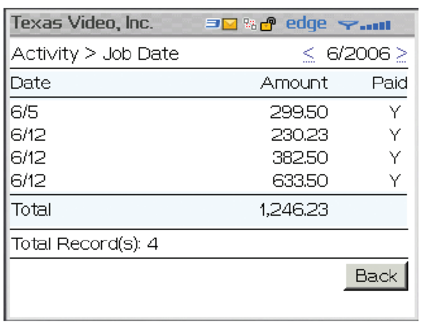




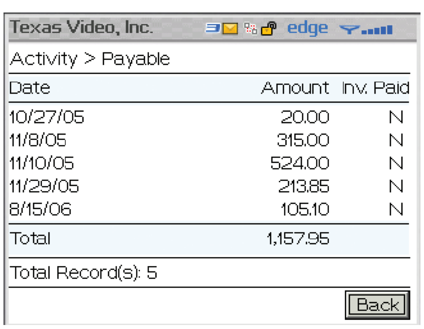
BlackBerry Activity screen

Cell Phone Activity screen

2. On the Activity screen, click **Job Date** to see all of your invoiced jobs for the current month. Navigate to other months by clicking the arrows at to top right of your screen.



3. On the Activity screen, click **Payable** to view everything that is payable and see whether an invoice has been paid.

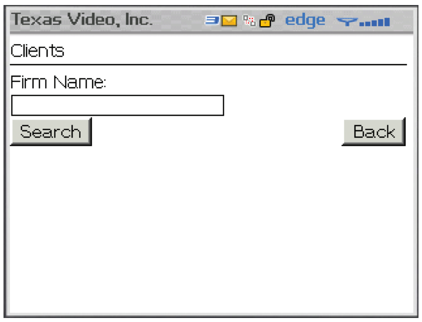


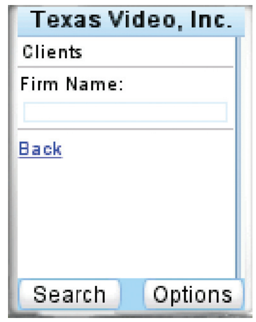
RB Web Mobile

Viewing your clients on a wireless device

If you are a sales representative with access to your client's scheduling and billing information on RB Web, you can view the same information on your *BlackBerry,* PDA, or web-enabled cell phone. You can wirelessly check details about individual firms, including contact information and directions to their location, how many jobs were scheduled and cancelled each month, and how many invoices were billed and the total amount for each month.

1. After logging into your regular RB Web URL on your wireless device, click **Clients.** In the Clients screen, enter part of the a firm's name and click **Search.** Or click **Search** without entering a firm name if you want to see all of your firms.



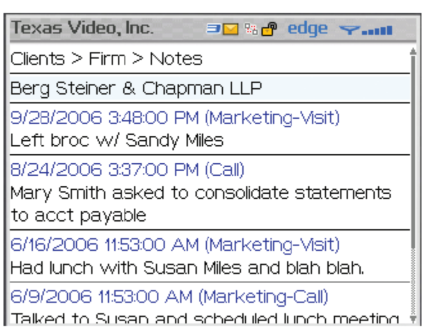


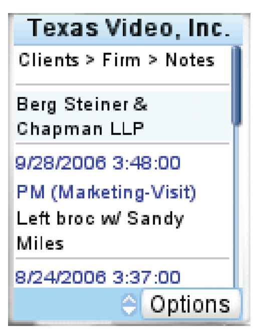
BlackBerry Clients screen

Cell Phone Clients screen

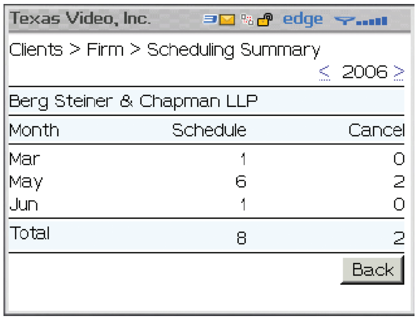
2. All matching firms appear. Click a firm name to see details about the firm, including a **View Map** hyperlink to *MapQuest* and links to **Notes Log, Scheduling Summary, Activity Summary** and **Firm Contacts.**

3. On the Firm screen, click **Notes Log** to see notes that were entered in RB8.

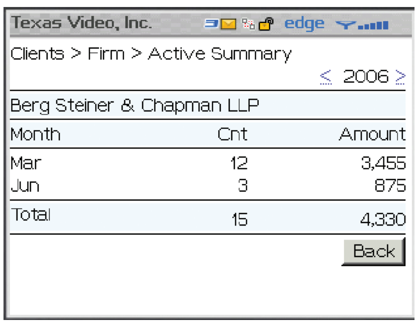


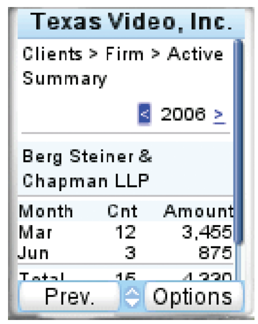


4. On the Firm screen, click **Scheduling Summary** to display a count of how many jobs were scheduled and cancelled each month in the current year. Navigate to other years by clicking the arrows at the top right of your screen.



5. On the Firm screen, click **Activity Summary** to display a count of how many invoices were billed and the total amount for each month in the current year. Navigate to other years by clicking the arrows at the top right of your screen.





6. On the Firm screen, click a contact's name to display the contact's information, including links to the contact's **Notes Log, Scheduling Summary** and **Activity Summary**.

Appendix A

Searching for firms

When you have to look up a firm during the turn-in process, you can use its name or city to search for the firm in the RB database.

1. In the Lookup Firms window, enter one or more search filters:
   - **Firm Name** – Enter any part of the firm name.
   - **City/Town** – Enter part of the city or town name.
2. Click **Search.**
3. All potential matches to the information you entered appear. To change the order of the firms, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order.
4. Select a firm by clicking its firm name (highlighted in blue).

NOTE

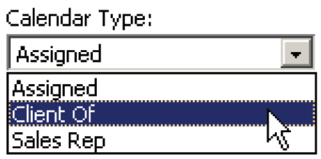
If the firm you want is not on the list, click **New** to add the firm along with the contact. If **New** is not visible, please provide the new firm and contact information in the Notes for this job field. (See “Turning in jobs.”)

Appendix B

Requesting assignments

If you have your own clients, view their pending jobs so you can request the assignments.

1. If you have the option, select **Client Of** in the **Calendar Type** drop-down.



2. Limit the jobs shown by selecting one or more search filters in the **Search Criteria** pane:

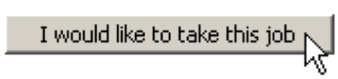
   - **Job Date** (List View only)– To find jobs for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Case** – To find jobs for a specific case, enter part of the case name into the field.
   - **Firm** – To find jobs for a specific firm, enter part of the firm's name in the field.
   - **Scheduled Date** – To find jobs scheduled during a specific period, enter beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.

3. Click **Search.**

4. To see a scheduled job's details, click its job number or job time (highlighted in blue) in the Calendar screen.

5. In the Calendar Detail screen, the information for the job you clicked appears.

6. Click **I would like to take this job** at the bottom of the screen. The office is notified of your request immediately.



7. Click **Back** (located at the bottom of the screen) to return to the Calendar screen.