



RB Web 8 online office for office staff

# Getting Started Guide

# Table of contents

## Introduction

Welcome to the RB Web 8 Getting Started Guide for office staff.....	3
---	---

## Web Site Configurations

Configuring RB Web 8 options.....	4
-----------------------------------	---

## Security

Unlocking locked-out accounts.....	8
------------------------------------	---

## Monitoring

Tracking RB Web 8 activities.....	8
-----------------------------------	---

## HTML

Working with HTML.....	9
------------------------	---

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### OMTI Inc.

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Introduction

## ***Welcome to the RB Web 8 Getting Started Guide for office staff***

This guide is for office personnel who are in charge of setting up and maintaining your RB Web 8 online offices. It contains instructions for configuring and customizing your RB Web 8 for your company. It also contains instructions for managing and monitoring your RB Web 8 after set-up. Plus it includes information on basic HTML code you will need for some customization options.

RB Web 8 works with your RB8 office management system, and it is in your RB8 system that you will find the tools described in this guide.

For information on using RB Web 8 online offices, please refer to the RB Web 8 online office user guides for attorneys, paralegals and other clients, and the user guides for reporters, sales reps and other resources. These guides are available as PDF downloads from our website: [www.omti.com/rb](http://www.omti.com/rb)

## Web Site Configurations

**Configuring RB Web 8 options**

Before you can make RB Web 8 available to your clients and resources, there are settings you must configure and defaults you need to customize. Preferences entered here apply to the entire web site.

1. On the menu bar in RB8, click **Tools > Web > Site Configurations**.
2. On the left side of the window, folders appear representing the RB Web 8 sites. Normally, you will see only one folder (“MAIN”), unless you purchased additional RB Web 8 licenses connected to the same RB8 database. Click the name of the web site you want to configure.



3. Click the **General** tab and specify the following information:
  - **Client Site URL** – Not an input field. The value is set at the time of installation by OMTI.
  - **Resource Site URL** – Not an input field. The value is set at the time of installation by OMTI.
  - **Product Version** – Not an input field. The value reflects the version of RB Web 8 you are currently using.
  - **Company Site URL** – Enter your company’s main web site address here. When your company’s logo is clicked within RB Web 8, the user will be redirected to the specified web site.
  - **Contact Email** – Not used in RB Web 8. Leave this field blank.
  - **Maximum Logon Count** – This field specifies how many successive login attempts users can make before they are locked out. After the specified number of attempts has been made, the user’s account will be locked out. (See “Unlocking locked-out accounts.”)
  - **Activity Log Service** – To track activities on your RB Web 8, select Enable in the drop-down. (See “Tracking RB Web 8 activities.”)
4. Click the **Cobranding-Content** tab and enter text that will appear on the login page for clients and resources. You can also specify the size, color and style of the text. These fields support HTML, so you can insert HTML codes (tags) to format the content. (See “Working with HTML.”)

<b>Client Login Page</b>	
Title:	Welcome to your online office.....
Description:	Come here whenever you need quick access to your depo calendar, invoices, transcripts and This site works with Internet Explorer or Firefox on Windows, and Firefox on Macs.
<b>Resource Login Page</b>	
Title:	Welcome to your online office
Description:	Come here whenever you need quick access to your job calendar, pay statements, files and n This site works with Internet Explorer or Firefox on Windows, and Firefox on Macs.

- Click the **Cobranding-Color** tab. Click the Select Color button in front of each section you want to co-brand with your company web site's look and feel.



- Click the **Web Mail** tab and specify the following information:
  - **Sender's Display Name** – Enter a name to use for sending an automatic response when a client schedules online. This name will be displayed as the sender (From) in the email.
  - **Sender's Email** – Enter an email address to use for sending an automatic response when a client schedules online.
  - **SMTP Server** – *Simple Mail Transfer Protocol (SMTP)* is a common protocol that is used to send email messages across the Internet. The best way to find the information about your SMTP server is to ask your Internet service provider (ISP). You can also get it from your email program such as *Microsoft Outlook* (see Tip below).
  - **SMTP Account Name/Password** – Enter any valid email account name and password that are set up on your SMTP server.

**TIP**

To get the information about your SMTP server from *Outlook*:

- On the **Tools** menu, click **E-mail Accounts**.
- Select **View or change existing e-mail accounts**, then click **Next**.
- Select your ISP account, then click **Change**.

Under **Server Information**, the **Outgoing mail server (SMTP)** field contains the server name.

- Click the **Calendar** tab and specify the following information:
  - **City** – Enter the default city to be displayed when the client is entering a new job request.
  - **State** – Select the default state to be displayed when the client is entering a new job request.
  - **Do not allow new job requests within this number of days** – If you do not want your clients to sneak in job requests in the middle of the night, enter 1 or 2 in this field to give your staff 24 or 48 hours to process the requests. Enter 0 to accept all requests no matter when.
  - **Instruction for Remarks** – Enter text to be displayed above the **Remarks** field. An example is shown below:

Remarks : Use this area if you need more space for the witness names:

- **Auto-Reply** – Select Yes to send an automatic email response when a job request is received.
- **Subject** – Enter text that will appear in the Subject line when automatic response emails are sent.
- **Message Header** – Enter text that will appear in the Message box as the header of automatic response emails. The body of the message will contain all of the details of the job request. This field supports HTML, so you can insert HTML codes (tags) to format the content. (See “Working with HTML.”)
- **Message Footer** – Enter text that will appear in the Message box as the footer of automatic response emails. This field supports HTML, so you can insert HTML codes (tags) to format the content. (See “Working with HTML.”)

Auto-Reply Email Settings	
Auto-Reply:	Yes
Subject:	AutoReply: Schedule Job Notification
Message Header:	This automatic notice is in response to your recent deposition request.
Message Footer:	This e-mail contains proprietary information and may be confidential. If you are not the intended recipient of this e-mail, you are hereby notified that any dissemination, distribution, or copying of this message is strictly prohibited. If you received this message in error, please delete it immediately.

- **Users to Notify** – Click **Add**. In the Lookup Users windows, select users who should be notified (via RB8’s Message Center) when new job requests are received.
8. Click the **Repository** tab and specify the following information:
- **Subject** – Enter text that will appear in the Subject line when repository notification emails are sent.
  - **Message Header** – Enter text that will appear in the Message box as the header of repository notification emails. This field supports HTML, so you can insert HTML codes (tags) to format the header. (See “Working with HTML.”)
  - **Message Footer** – Enter text that will appear in the Message box as the footer of repository notification emails. This field supports HTML, so you can insert HTML codes (tags) to format the footer. (See “Working with HTML.”)
  - **Users to Notify for Repository Notification** – When you send repository notifications to clients, you have an option to send a copy to the office. Click **Add**. In the Lookup Users window, select users who should receive copies of the notification.
- Send carbon copy to office
- **Users to Notify for New File Upload or Delete Request** – When resources upload files in the **Repository** section of RB Web 8, the office should be alerted. Click **Add**. In the Lookup Users window, select users who should be notified.

9. Click the **Business Units** tab and specify the following information:
  - **Business Units Access for Contacts** – Click **Add**. In the Lookup Business Units window, select all of the business units that clients should have access to when using this web site. Normally, you select all of your business units, unless you purchased additional RB Web 8 licenses connected to the same RB8 database. Highlight the main business unit, then click **Set as Default**. The default business unit is displayed when the client is entering a new job request. (See Best Practices below.)
  - **Business Units Access for Resources** – Click **Add**. In the Lookup Business Units window, select all of the business units that resources should have access to when using this web site. Normally, you select all of your business units, unless you purchased additional RB Web 8 licenses connected to the same RB8 database. Highlight the main business unit, then click **Set as Default**. The default business unit is displayed on billing sheets and worksheets.



#### BEST PRACTICES

If you have multiple business units (branch offices), it will be difficult for clients to choose the right business unit when they are entering job requests. For that reason, it is recommended that you create a dummy business unit called *Web Order* and make it the default business unit.

Back in the office, the calendar staff will make a determination as to which business unit should handle the request.

10. Click the **Accessibility** tab. By default, all modules and options are enabled when RB Web 8 is installed. To disable (turn off) any of the modules or options, select No in the corresponding drop-down.
11. Click the **News** tab. In the **Client News** field, enter text that will appear in the My Web > News area for the clients. In the **Resource News** field, enter text that will appear in the My Web > News area for the resources. These fields support HTML, so you can insert HTML codes (tags) to format the news. (See “Working with HTML.”)
12. Click the **Request Assignment** tab. Click **Add**. In the Lookup Users window, select users (e.g., calendar manager) who should be notified when resources request to be assigned to jobs coming from *their* clients. This is called the “Client Of” feature.
 

I would like to take this job
13. Click the **Turn-in Alert** tab. Click **Add**. In the Lookup Users window, select users (e.g., production manager) who should be notified when resources turn in jobs online through RB Web 8.
14. Click **Save**.

## Security

**Unlocking locked-out accounts**

An account (for RB Web 8 login) can get locked out due to multiple login failures. The office must unlock the account before a contact (or resource) can use it again.

1. On the menu bar in RB8, click **Setup > Contacts** (or **Resources**).
2. Search for the contact (or resource) whose account has been locked out.
3. Right-click the contact (or resource), then choose **View**.
4. Click the **Additional** tab.
5. Uncheck the **Account is locked out** checkbox.



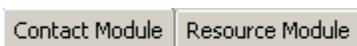
6. Click **Save and Close**.

## Monitoring

**Tracking RB Web 8 activities**

If you have enabled the Activity Log Service, RB8 will keep track of activities by clients and resources on RB Web 8. The activity log will show you what sections of RB Web 8 are popular and who is using the web site.

1. On the menu bar in RB8, click **Tools > Web > Web Activity Log**.
2. In the Search Criteria pane, **Site** defaults to MAIN and the **Activity Date** range defaults to the current month. Change the search filters as needed, then click **Search** (or press **Alt + S**).
3. RB8 lists all of the web activities that meet the specified search condition(s) as two separate reports. Each report is shown as a tab.



Contact	Log In	Calendar	Activity	Transcripts	Case Repository	Download Files
Daniel Berg, Esq.	3	0	0	3	0	3
Larry Shoemaker	3	1	1	1	0	0
David A. McGuire	11	8	1	2	4	3

## HTML

**Working with HTML**

A web page is simply a text document that contains instructions for web browsers. If you look at a typical web page in a regular text editor, you see a bunch of code in angle brackets and a bunch of text; it's not very exciting. However, when a web browser "sees" a web page, it uses these bits of code, called *tags*, to interpret how the document should look and what is to happen when certain things are clicked on.

Hypertext Markup Language (HTML) is the predominant markup language for web pages. HTML is written in the form of tags, surrounded by angle brackets (<>). It is beyond the scope of this guide to cover HTML in its entirety. Here are minimal basics you should know to format the message header and footer for RB Web 8.

**General Rule**

HTML tags consist of a left angle bracket (<), followed by name of the tag and closed by a right angular bracket (>). Tags are usually paired. The ending tag looks just like the starting tag except a slash (/) precedes the text within the brackets.

**Forced Line Breaks**

The <BR> tag forces a line break with no extra space between lines. (By contrast, most browsers format the <P> paragraph tag with an additional blank line to more clearly indicate the beginning the new paragraph.)

**Character Formatting**

<B>                Bold text

<I>                Italic text

**Linking to Other Documents**

The chief power of HTML comes from its ability to link regions of text (and also images) to another document. The browser highlights these regions (usually with color and/or underlines) to indicate that they are hypertext links (often shortened to *hyperlinks* or simply *links*).

HTML's single hypertext-related tag is <A>, which stands for *anchor*. To include an anchor in your document:

1. Start the anchor with <A>.
2. Specify the document that's being pointed to by entering the parameter **HREF="filename"** followed by a closing right angle bracket >.
3. Enter the text that will serve as the hypertext link in the current document.
4. Enter the ending anchor tag: </A>.

### Example 1: Repository notification message header

Copy the tags shown in bold and substitute your own company information to create your repository notification message header.

**OMTI Court Reporting**

The following files are available from <http://omti.reporterbase.com/rbweb/attorney> our web site.

#### OMTI Court Reporting

The following files are available from [our web site](#).

### Example 2: Repository notification message footer

Copy the tags shown in bold and substitute your own company information to create your repository notification message footer.

If you don't know your login information, contact [support@omti.com](mailto:support@omti.com).

If you don't know your login information, contact [support@omti.com](mailto:support@omti.com)