

RB Web 8 online office for attorneys, paralegals and secretaries

# **User Guide**

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**Program Basics** 

## Logging in

Sign in to view your calendar, check account activity, download transcripts and make job requests. Our online offices are password-protected. To access them, you must use your user ID and password. If you do not have a user ID and password, or have forgotten them, please contact us.

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



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

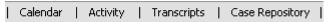


If you have forgotten your password, click Forgot Password. Enter your user ID in the Reset your password pop-up and click Submit. We will send an email to the address we have on file for you with a link to the page where you can reset your password.

**Program Basics** 

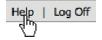
# Navigating the site

After logging in, access the main areas, such as your calendar, account activity, transcripts or case repository, by clicking the buttons in the navigation bar near the top of the screen.





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 a certain amount of time, 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 (recommended method for security reasons), or
- Closing your browser window.



An alert box warns you shortly before automatically disconnecting you. Click **OK** to stop the process.

My Web

# Reviewing & updating your personal information

Use the My Web area to update your contact information with us, such as your phone numbers and email addresses.

- 1. Click **My Web** in the navigation bar.
- 2. To change your contact information, click **My Profile.** You can change the information in any field and leave any field blank except required fields. Required fields appear in red with an asterisk (\*) after the field label.
  - Email Enter the email address you want us to use for general email correspondence with you.
  - **Confirmation Email** If you prefer to have automatic confirmation emails sent to another party, such as a secretary, enter that email address here. If you leave this field blank, no confirmation emails will be sent.
  - **Billing Email** If you prefer billing emails to be handled directly by your billing department or other person, enter that email address here. If you leave this field blank, no billing emails will be sent.
- 3. Click Save.



#### TIP

You can enter multiple email addresses in any of the email fields if you separate the addresses with commas.

My Web

# Changing your user ID & password

You can change your user ID and password at any time.

- 1. Click **My Web** in the navigation bar.
- 2. To change your user ID, click Change ID.
- 3. Your current user ID appears above the **New ID** field. Enter your new ID and click **Save.**
- 4. To change your password, click Change Password.
- 5. Enter your current password in the **Current Password** field. Enter your new password in the **New Password** and **Confirm Password** fields, and click **Save.**



### WARNING

If you change your user ID and/or password, we will not have a record of your new user ID/password. Keep a copy of your new user ID/password in a safe place. If you lose your user ID/password, we can issue you a new one.

My Web

# Accessing your non-case files

In addition to storing your transcripts, other case files and invoices online, we can also store files related to transactions between our firms and with you individually. Examples of these types of files include our rate sheets and contracts. You can access these files anytime in the My Web area.

- 1. Click **My Web** in the navigation bar.
- 2. To see a list of files we maintain online with:
  - Your firm click **Firm Repository.**
  - You individually click **Attorney Repository.**
- 3. To view a file, click its download (arrow) button.



4. To track your file viewing and downloading, click **Mark as Reviewed** for any files you have viewed or downloaded. The date and time replaces **Mark as Reviewed.** To clear tracking for any file, click the red X next to its date and time.

Uploaded	Size(KB)	Reviewed	Action	
1/27/2011	1/27/2011 38 M		<u> </u>	-
6:56 PM		Reviewed		

Uploaded	Size(KB) Reviewed		Action	
1/27/2011 6:56 PM	38	2/25/2011 1:32 PM 💥	Ū	-

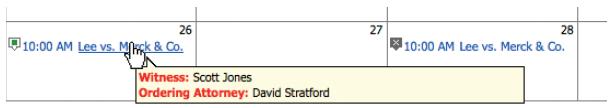
# Viewing your real-time calendar

You don't have to call us to check your schedule. The information on our site is always the most complete and up to date available. You can set your calendar viewing preferences, such as whether you want to see jobs in a list or monthly calendar format, and the calendar will remember them the next time you sign in. The monthly calendar format makes it easy to see how many jobs you have scheduled for each day.

- 1. Click **Calendar** in the navigation bar.
- 2. In the Calendar screen, your scheduled jobs for the current month appear. You can choose a **View Style** in the drop-down:
  - Calendar To see scheduled jobs a month at a time.
  - List To see jobs in a list format.

Job No.	Job Date +	Case Name
13349	2/24/2011 09:00 AM	Mullis Maggio vs Avaya Corps.
13348	2/23/2011 09:30 AM	Mullis Maggio vs Avaya Corps.
13347	2/22/2011 09:00 AM	Mullis Maggio vs Avaya Corps.
13346	2/21/2011 10:30 AM	Mullis Maggio vs Avaya Corps.
13352	2/15/2011 08:00 AM	Kruse vs. Merck
13351	2/10/2011 11:00 AM	Elemental vs. Howard Rice

- 3. Limit the jobs shown by selecting one or more search filters in the Search Criteria pane:
  - **Job Date** To find jobs for different time periods, enter new beginning and/or 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.
  - Witness To find jobs for a specific witness, enter part of a witness's name in the field.
  - Ordering Attorney To find jobs for a specific attorney, select one in the drop-down list. Default is ALL.
- 4. Click Search.
- 5. If viewing in Calendar format, you can see 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.
- 6. In Calendar format, pause the cursor over a case name to see its witness and attorney.





TIP

In List format, you can sort the information by any column in either ascending or descending order. Simply click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order.

# Viewing scheduled jobs' details

Review individual scheduled jobs in detail, including driving directions.

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

Job No.	Job Date +	Case Name
13349	2/24/2011 09:00 AM	Mullis Maggio vs Avaya Corps.
13348	2/23/2011 09:30 AM	Mullis Maggio vs Avaya Corps.
13347	2/22/2011 09:00 AM	Mullis Maggio vs Avaya Corps.
13346	2/21/2011 10:30 AM	Mullis Maggio vs Avaya Corps.
13352	2/15/2011 08:00 AM	Kruse vs. Merck
13351	2/10/2011 11:00 AM	Elemental vs. Howard Rice
13350	2/1/2011 10:00 AM	Garth vs. Junk Motor
13278	12/28/2010 11:00 AM	Arend vs. Merck
13277	11/30/2010 02:00 PM	Microsoft vs. Apple
13058	10/29/2010 02:00 PM	Elite vs. Merck & Co.

- 2. In the Calendar > Detail screen, the information for the job you clicked appears. All of this information is read-only.
- 3. In the Location section, click View Map (highlighted in blue) to see the map and directions in a new window.

Location	Texas Children's Hospital 6621 Fannin St # Fc330.01 Houston, Texas 77030 View Map
	Contact: Steve Spurrier Room No.: 4125

4. Click **Back** (located at the bottom of the Calendar > Detail screen) to return to the Calendar screen.

# Adding jobs to your own calendar

Jobs listed in your online calendar, with yourself as the ordering attorney, can be added to any third-party calendar, such as *Outlook*, that supports .ics files.

1. In the Date section of the Calendar > Detail screen of a selected job, click **Add to My Calendar** to add this job to your calendar.

Job No.	13214
Date	2/9/2011 Add to my calendar

- 2. In the Opening Conformation window, choose either:
  - Open with To add the event directly to your calendar, select your calendar application.
  - Save File To add the event to your calendar later.



3. Click OK.



NOTE

If you chose **Open with**, the application you selected will automatically open and insert your calendar listing in the correct date. If you chose **Save File**, it will automatically open the application and insert your calendar listing when you open the saved .ics file.

# Entering new job requests from scratch

If you are starting a new case, use the Request New Job form to make a job request. Quickly add details by filling in blanks, making selections in drop-downs and checking off boxes. Any selections not relevant to your request can be left blank unless it is a required field (marked by an asterisk). You will receive an instant email acknowledgement when you send in your request.

Due to our customization, your Request New Job form might offer different selections than those listed below. These are the defaults. Contact us if you have any questions. If you are making a job request on a continuing case, see "Creating new requests from old jobs."

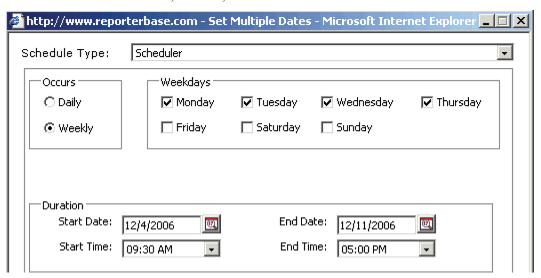
- 1. In the Calendar screen, click **Request New Job.**
- 2. Under Job Information, enter the following applicable information:
  - **Job Date** (required) Click the calendar button and select a date in the Date Navigator. If this job is for multiple days, see "Creating recurring jobs."
  - Time (required) Select a start time and an estimated end time in the drop-downs.
  - **Time Zone** This information is used by your calendar application. See "Adding jobs to your own calendar."
  - Case Name Enter the brief caption (e.g., Smith vs. Big Company).
  - Case No. Enter the court-assigned case (cause) number.
  - **Job Type** Select a job type in the drop-down.
  - Witness Enter the witness's name. You can enter more than one witness here. If you need more space than 80 characters, use the **Remarks** field below.
  - Expert Type If the witness is an expert, select an expertise in the drop-down.
  - Subpoenaed Witness If the witness has been subpoenaed, click the checkbox.
  - Specialties Click the look-up button. In the Specialties window, click a blank checkbox to add a specialty. Click a marked checkbox to remove a specialty.
  - Remarks Enter any additional requests, such as for a specific reporter or special equipment.
- 3. Under Location Information, check the **Same Location as Ordering** box if the job is going to be at your office. Otherwise, enter the location name, address and other relevant information.
- 4. Under Ordering Information, enter the following applicable information:
  - Attorney (required) If needed, select a different contact in the drop-down.
  - Ordered By Enter your full name.
  - Request Services Click the look-up button. In the Services window, click a blank checkbox to add a service. Click a marked checkbox to remove a service.
- 5. Under Billing Information, click the **Same as Ordering** checkbox if your office will be billed. Otherwise, enter the following applicable information:
  - **Direct Billing Notes** Enter the name and complete billing address of the third party to be billed, such as an insurance company.
  - Client Matter No. Enter your reference or file number.
  - Claim No. Enter the insurance claim number.

- Name of Insured Enter the name of the insured.
- **Date of Loss** Enter the date of loss (accident), or click the calendar button next to the field and select a date in the Date Navigator.
- 6. Under Attachments, click **Browse** to select a file (such as notice) to send with the request if desired. You can attach up to three files to each job request.
- 7. Click **Save.** You will receive an instant email acknowledgement of your request. Or click **Cancel** to return to the Calendar screen without saving your request.

# Creating recurring jobs

If you have a series of similar jobs occurring over a range of days, such as trials, save time by using the Create Jobs wizard.

- 1. In the Calendar > Request New Job screen under Job Information, next to **Job Date**, click **Set Multiple Dates**, then click the calendar button.
- 2. In the Set Multiple Dates window, enter the following information:
  - Schedule Type Select Fixed Dates in the drop-down to enter job dates manually one at a time. Otherwise, leave Scheduler as the default.
  - Occurs Select Daily to create jobs for every day including Saturday and Sunday. Select Weekly to select the days of the week.
  - Weekdays Select the days of the week.
  - **Duration** Enter the start date, end date, start time and end time.



- 3. Click OK.
- 4. Continue with the rest of Step 2 in "Entering new job requests from scratch."

# Creating new requests from old jobs

If you are entering a new job request on a continuing case, save time and reduce errors by copying an existing job and entering only the new information, instead of starting a request from scratch.

- 1. In the Calendar screen, search for a previous job, then click its job number (highlighted in blue) to display details.
- 2. In the Calendar > Detail screen, click Copy & New (at the bottom of the screen).



- 3. Every field is copied from the selected job except **Job Date**, **Time** and **Witness**. Enter a new job date, time and witness. Make any other changes to reflect your new request.
- 4. Click **Save.** You will receive an instant email acknowledgement of your request. Or click **Cancel** to return to the Calendar screen without saving your request.

Calendar

# Changing job requests

You can make any necessary changes to future jobs in your calendar, except the job date, with Request Change Job Info. To change the job date, you must reschedule the job. (See "Rescheduling jobs.") If a job is past our cut-off date for changes and you need to revise it, please contact our office.

- 1. In the Calendar screen, search for a previous request, then click its job number (highlighted in blue) to display details.
- 2. In the Calendar > Detail screen, click **Request Change Job Info** (at the bottom of the screen).
- 3. To make changes, check the box(es) next to the desired field(s), and make the change(s).
- 4. When finished updating the job information, click **Save.** Or click **Cancel** to return to the Calendar screen without saving your request.



NOTE

Any job changes you request generate support tickets in our system for tracking purposes. If you have the option to view support tickets, click **Support** in the navigation bar to monitor your requests. (See "Asking for help & other information.")

# Rescheduling job requests

To change the date of a scheduled upcoming job, you must reschedule the job. If a job is past our cut-off date for changes and you need to change the date, please contact our office.

- 1. In the Calendar screen, search for the job you want to cancel. Click its job number (highlighted in blue) to display details.
- 2. In the Calendar > Detail screen, click **Reschedule** (at the bottom of the screen).
- 3. In the Calendar > Reschedule Job screen, enter the new **Job Date**, **Time**, **Reason** (you are changing the Job Date), and Confirmation Email (address you want the Change Confirmation email sent to).
- 4. If you have files associated with the new job date, click **Browse** under Attachments, to select a file (such as notice) to send with the request. You can attach up to three files.
- 5. Click **OK.** You will receive an instant email acknowledgement of your request. Or click **Cancel** to return to the Calendar screen without saving your request.

#### Calendar

# Canceling job requests

If a job is cancelled, send us a cancel request.

- 1. In the Calendar screen, search for the job you want to cancel. Click its job number (highlighted in blue) to display details.
- 2. In the Calendar > Detail screen, click **Request Cancel** (at the bottom of the screen).



- 3. In the pop-up Request Cancel window, enter your name in Cancelled by field and the reason for canceling in Reason field.
- 4. Click Save. You will receive an instant email acknowledgement of your request. Or click Close to return to the Calendar Detail screen without saving your request.

Activity

# Viewing account activity

See at a glance which invoices have been paid and what you still owe. Filter invoices by date, attorney, case name or client matter number. Review the details of any invoice. Pay any outstanding invoices online.

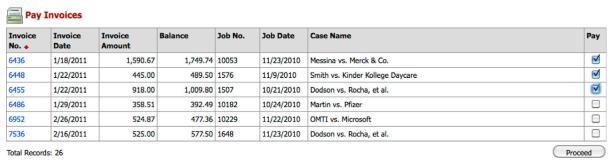
- 1. Click **Activity** in the navigation bar.
- 2. In the Activity screen, your current invoices (billed during the last 10 days) appear, sorted by invoice number. Search for invoices by selecting one or more search filters in the **Search Criteria** pane:
  - **Invoice Date** To see invoices for different time periods, enter new beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
  - Client Matter No. To see invoices for a specific client matter number, enter the client matter number in the field.
  - Case To see invoices for a specific case, enter part of the case name into the field.
  - **Job Date** To see invoices for specific job dates, enter new beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
  - Account Status To view only open invoices or only paid invoices, select that choice in the drop-down.
  - Attorney To find invoices for a specific attorney, select one in the drop-down list.
- Click Search.
- 4. 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.
- 5. Click an invoice number (highlighted in blue) for more details.
- 6. In the Activity > Invoice Detail screen, if the original invoice has been archived, you can view or download it by clicking the download (arrow) button in the **Files** section.
- 7. If there are multiple files listed, you can download more than one at a time by checking the boxes next to the files you want to download and clicking **Download checked files.**
- 8. To track your file viewing and downloading, click **Mark as Reviewed** for any files you have viewed or downloaded. The date and time replaces **Mark as Reviewed.** To clear tracking for any file, click the red X next to its date and time.
- 9. If you have the option, you can pay the outstanding amount shown by clicking **Pay Invoice.** In Activity > Pay Now, enter the credit card and billing information, then click **Pay Now.** Or click **Cancel** to return to the Activity > Detail screen without submitting your payment.
- 10. Click **Back** (located at the bottom of the screen) to return to the Activity screen.

Pay Invoices

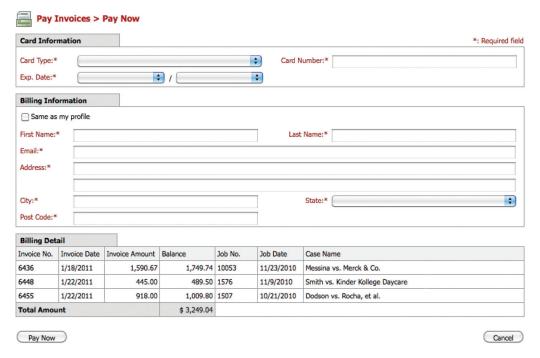
# Paying invoices online

You can pay invoices (including COD invoices) online using credit cards. RB Web e-commerce is fully integrated with PayPal for security and convenience.

- 1. If you have the option, click **Pay Invoices** in the navigation bar.
- 2. In the Pay Invoices screen, all open (unpaid) invoices appear, sorted by invoice number.
- 3. Click the **Pay** checkbox next to each invoice you want to pay.



- Click Proceed.
- 5. In Pay Invoices > Invoice Detail, enter the credit card and billing information, then click **Pay Now.** Or click **Cancel** to return to the Pay Invoices screen without submitting your payment.





You can review and pay any individual invoice in the Pay Invoices list by clicking its job number in the list, then clicking **Pay Invoice** at the bottom of Pay Invoices > Invoice Detail. Continue with step 5 above to submit your payment.

**Transcripts** 

# Downloading transcripts

You don't have to wait to receive transcripts; you can download them anytime, anywhere you have Internet access, with the click of a button.

- 1. Click **Transcripts** in the navigation bar.
- 2. In the Transcripts screen, search for transcripts by selecting one or more search filters in the Search Criteria pane:
  - Case To find transcripts for a specific case, enter part of the case name into the field.
  - Witness To find a specific witness, enter part of the witness's name in the field.
  - Job Date To find transcripts for a specific job date range, enter new beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
  - Uploaded Date To find transcripts for different time periods, enter new beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
  - Attorney To find transcripts for a specific attorney, select one in the drop-down list.
- 3. Click Search.
- 4. All potential matches to the information you entered appear with their associated files available for download.



To find transcripts, enter part of the case name (or witness name), then click Search. You may also use job date or uploaded date range.

Witness	Job Date Case Name	Case Name	Case No.		Job No		
File Name	File Type	Description	Uploaded	Size(KB)	Reviewed	Actio	on
Ted Yoo	3/10/2011	OMTI vs. Microsoft	89 MC 56091	89 MC 560912-TV		13358	
041709ld.bxt	ASCII		2/16/2011 5:03 PM	521	Mark as Reviewed	<u>U</u>	-
Derrick Arend	8/12/2009	Arend vs. Merck	88-V-1234	88-V-1234		12839	
SK 09-03-09 Dellasalla v Roselle.txt	ASCII		9/17/2009 9:51 AM	13	Mark as Reviewed	<u>U</u>	-
Jason Yee	3/27/2009	Arend vs. Merck	88-V-1234	88-V-1234		12747	
#4075-LE.txt	ASCII		5/12/2010 2:10 PM	1	1/3/2011 2:00 PM 💥	<u>U</u>	-
#4077-LE.txt	ASCII		5/12/2010 2:10 PM	1	Mark as Reviewed	<u></u>	н

- 5. Click the download (arrow) button next to the file you want to download.
- 6. If there are multiple files listed, you can download more than one at a time by checking the boxes next to the files you want to download and clicking **Download checked files.**
- 7. To track your file viewing and downloading, click Mark as Reviewed for any files you have viewed or downloaded. The date and time replaces Mark as Reviewed. To clear tracking for any file, click the red X next to its date and time.



To change the order of the listings in the Transcripts screen, select a category in the Sort By drop-down, then click **Search.** For example, to sort a list by case, choose **Case Name** in the **Sort By** drop-down.

Case Repository

# Reviewing case-wide documents

Using our secure online document repository, you can access all of your files for a particular case from anywhere you have Internet access.

- 1. Click **Case Repository** in the navigation bar.
- 2. In the Case Repository screen, search for a case by selecting one or more search filters in the Search Criteria
  - Case Name Enter part of the case name into the field.
  - Case No. Enter part of the case (cause) number.
  - Attorney Select an attorney in the drop-down list.
- 3. Click Search. All potential matches to the information you entered appear. Click the case name to see all of the associated files for the case.
- 4. In the Case Repository > Files screen, search for a file by selecting one or more search filters in the Search Criteria pane:
  - File Type Select a file type in the drop-down list.
  - File Name Enter part of the file name.
  - **File Description** Enter part of the description.
  - Uploaded Date To find files uploaded for a specific period, enter new beginning and/or end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
- 5. Click Search.
- 6. Click the download (arrow) button next to the file you want to view or download.
- 7. If there are multiple files listed, you can download more than one at a time by checking the boxes next to the files you want to download and clicking Download checked files.
- 8. To track your file viewing and downloading, click Mark as Reviewed for any files you have viewed or downloaded. The date and time replaces Mark as Reviewed. To clear tracking for any file, click the red X next to its date and time.
- 9. Click **Back** to return to the Case Repository.



To view files without downloading, click the download button. In the pop-up window that appears, click **Open.** The file opens for viewing in the appropriate viewer, if the viewer is installed on your computer. For example, if you have the Acrobat reader installed, any PDF you select will open without saving to your hard drive.

To change the order of the listings in the Case Repository screen, select a category in the Sort By drop-down, then click **Search.** For example, to sort a list by size, choose **File Size** in the **Sort By** drop-down.

Support

# Asking for help & other information

If you have the option, you can make requests other than automated ones with Support Tickets. After making an inquiry, you can track its resolution and continue the discussion with us in the Support area.

- 1. To make an inquiry, click **Support** in the navigation bar.
- Click New Ticket.
- 3. In Support > New Ticket, enter the following information:
  - **Subject** (required) A descriptive title for your inquiry will make it easier to track if you have multiple inquiries.
  - **Description** (required) A detailed description will help us understand your inquiry and resolve it sooner.
- 4. Click Save. Or click Cancel to return to the Support screen without saving your request.
- 5. All of your inquiries are listed in the Support screen. You can limit which appear by using the Search filters. Click any listing to view its details and continue the discussion.



If you have a problem or a question for us, please click **New Ticket**. Then enter a subject and description in the appropriate fields and click **Save**. A ticket will be generated by the system automatically notifying us of your issue and allowing you to track the progress of your solution.



Status	Ticket No.	Subject	Last Modified	Created
Awaiting Response	1001	Request Bill for my order #5002	9/17/2008 9:59:00 AM	9/5/2008 4:06:00 PM
Awaiting Response	1003	Request Change Job Info	9/17/2008 4:15:00 PM	9/17/2008 4:15:00 PM
Pending Customer Response	1004	Request Change Job Info	3/30/2009 1:11:00 PM	9/17/2008 5:16:00 PM
Awaiting Response 1005		Request Change Job Info	9/17/2008 5:19:00 PM	9/17/2008 5:19:00 PM

Total Records: 4



### NOTE

If you have the option, you can also track job information changes you requested using the Request Change Job Info function in the Support screen. ( See "Changing job requests.")