



RB Web 8 online office for attorneys, paralegals and secretaries

User Guide

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Logging in

Sign in to view your calendar, check account activity, download transcripts and other files, and make job requests.

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



The screenshot shows a dark-themed login interface. On the left, there is a label 'User ID:' followed by a text input field containing the text 'bergda'. On the right, there is a label 'Password:' followed by a password input field with six black dots. Below these fields is a rectangular button with the text 'Log In' in a light-colored font.

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



TIP

Our online offices are password-protected. To access them, you must use your user ID and password. 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. If you do not have a user ID and password, or have forgotten your user ID, please contact us.

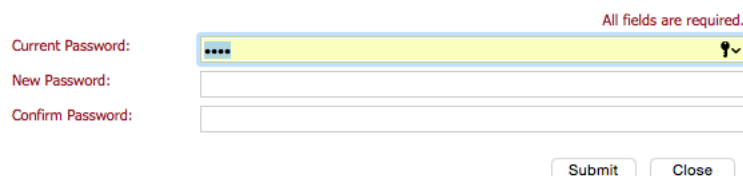
Resetting password for security reasons

For security reasons, your agency might require that you reset your RB Web password periodically before you can access your online office.

1. If the Reset Your Password pop-up appears after signing into the Log-In screen, enter a new password in both **New Password** and **Confirm Password**. Make note of your new password.

Reset your password

For the security reason, web user must change their password every 30 days.



The screenshot shows a 'Reset your password' pop-up window. At the top right, it says 'All fields are required.' Below this, there are three input fields: 'Current Password:' (with a yellow background and masked dots), 'New Password:', and 'Confirm Password:'. At the bottom, there are two buttons: 'Submit' and 'Close'.

2. Click **Submit**.



TIP

Your agency might allow users to keep their current password. If so, you can enter your current password in **New Password** and **Confirm Password** before submitting your reset password.

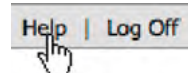
Navigating the site

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.



NOTE

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



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.



NOTE

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

Downloading & reviewing files



RB Web includes several file repositories where you can access notices, transcripts, exhibits, invoices, and other files. It also has a simple system so you can track which files you have downloaded and viewed.

1. In any list of files that includes the download feature, click the download (arrow) button next to the file you want to download.



2. If a pop-up window appears asking if you want to mark the file as “Reviewed” before you download it:
 - Click **OK** to track the date and time that you downloaded and reviewed this file. The date and time replaces **Mark as Reviewed**.
 - Click **Cancel** to download the file without tracking date and time.




- You can track any file at any time by clicking its **Mark as Reviewed** link. The current date and time replaces **Mark as Reviewed**.
- To clear tracking for any file, click the red X next to its date and time. In the pop-up window that appears, click **OK**.

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



TIP

If you have the option to download multiple files at once, you can either check the boxes next to the names of all the files you want to download, or if you want to download all the files listed, check the box next to **File Name** at the top of the grid. Then click **Download checked files**.


Repository Files						
<input type="checkbox"/> File Name	File Type	Description	Size(KB)	Reviewed	Action	
<input type="checkbox"/> CNAGIZZE3-28-13.pdf	PDF Transcript		8	7/21/2013 10:00 PM ✘		- -
<input type="checkbox"/> CNAGIZZE3-28-13.txt	ASCII		2	7/21/2013 10:00 PM ✘		- -
<input type="checkbox"/> Exhibit.pdf	Exhibit		194	Mark as Reviewed		- -

If after following these instructions, you are not able to download multiple files at once, it means your browser does not support downloading files this way in RB Web. You can still download files one at a time using the download (arrow) button.



NOTE

If the Pay Invoice pop-up appears when trying to download a file, click **Close**, then click **Pay Invoices** in the main menu to find the related invoice to pay online. (See “Paying invoices online.”) Otherwise, contact the agency to pay the invoice.



Pay Invoice

This file will be available for view upon full payment. Please contact our office to arrange payment.

My Web

Reviewing & updating your personal information

When you log in to RB Web, the My Web area is the default view. 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, if needed, to return to the default screen.
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, if needed.
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.

Calendar

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

3. Limit the jobs shown by selecting one or more search filters in the **Search Criteria** pane:
 - **Job Date From/To** – 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, a job's current status is reflected in its icon. Pause the cursor over a case name to see its witness and attorney.

📌 Request New 🟢 In-Progress 🟡 In Production 📄 Billed 🟢 Shipped 📄 Request Cancelled ✕ Cancelled 🟡 Back Order

	26	27	28
	🟢 10:00 AM Lee vs. Merck & Co.		✕ 10:00 AM Lee vs. Merck & Co.
	Witness: Scott Jones Ordering Attorney: David Stratford		



TIPS

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.

Make it easier to find what you want by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many jobs appear on the screen at a time.

Viewing scheduled jobs' details

Review individual scheduled jobs in detail, including driving directions. If you are the ordering attorney for the job, you can upload related files.

- 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.

- In the Calendar > Detail screen, the current information for the job you clicked appears. All of this information is read-only. Status shows you where the job is in our workflow. To add this job to your desktop calendar, see "Adding jobs to your own calendar."



Calendar > Detail

All job details shown are current in our system.

Job Information			
Job No.	13622	Status	Confirmed
Date	11/5/2014 Add to my calendar	Time	11:00 AM ~ 04:00 PM
Time Zone	(GMT-06:00) Central Time (US & Canada)	Daylight Saving	Yes
Job Type	Depo	Case No.	
Case Name	OMTI TEST REPORTING SERVICES. IN vs. SPECS DRUG APLTHA Department		
Witness			
Expert Type	No	Subpoenaed Witness	No
Specialties			
Location	Berg Steiner & Chapman LLP 510 Louisiana Street, 2nd Floors Houston, Texas 77042 View Map Contact: Daniel Berg		

- In the Location section, click **View Map** (highlighted in blue) to see the location map and driving directions in a new window.
- Depending on the job, there might be a section listing Other Parties to the job, including their firm names, attorney names, and email addresses.
- Under Turn-in Information, the reporter assigned to the job is listed with the estimated due date of the completed transcript.
- Under Repository Files, any job-related files in our repository are listed.
 - To download files**, see "Downloading and reviewing files."
 - To upload a file**, if you are the ordering attorney, click **New**. Under New File, click **Browse**. Find your file and click **Open**. Enter information about the file in the **Description** field. Then click **Save**.
- Click **Back** (located at the bottom of the Calendar > Detail screen) to return to the Calendar screen.



NOTES

When uploading files, if you are on RB8 Cloud but not using the latest version of your browser, a pop-up message will ask if you want to continue. You can continue using an old browser by clicking **OK**, but we advise you to always use the latest browser for security reasons and to avoid file errors in uploads.

After uploading a file, RB Web checks that the original and uploaded file sizes match. If the two file sizes don't match, the uploading process is cancelled, and you can try to upload the file again.

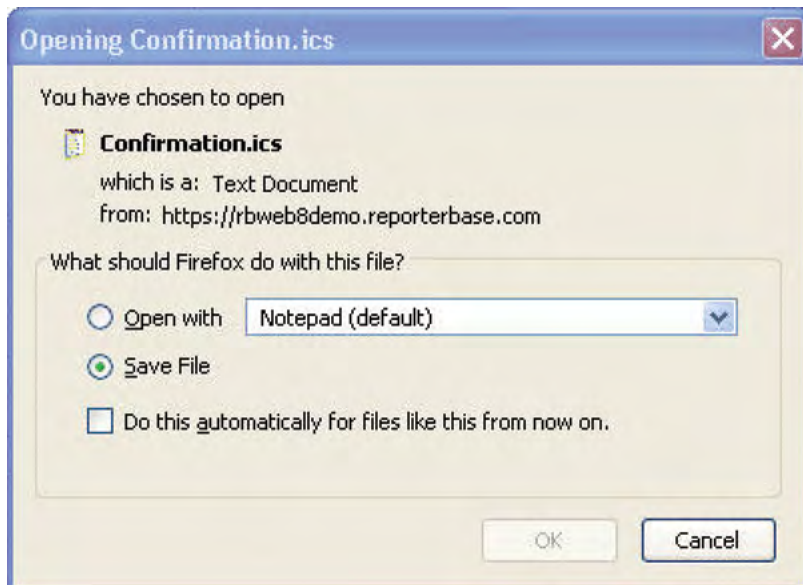
Adding jobs to your own calendar

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 Confirmation 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**.



TIP

If you do not see the **Add to My Calendar** link, select your time zone in the **Time Zone** drop-down, then click **Save**. RB Web automatically closes the detail window and returns you to the main Calendar screen. Click the job in the Calendar to see the detail screen. **Add to My Calendar** should appear. This function can only export jobs that have a time zone selected.



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

When starting a case, use the Request New Job form to make a request. (If you are making a request on a continuing case, see “Creating new requests from old jobs.”) 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.

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** – Select a time zone if you want to add this job to your calendar application, such as *Outlook*. 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.
 - **Confirmation Email**: If needed, edit or change the default contact email shown, which is where confirmation of this request will be sent. You can add more email addresses to the field, separating them with commas. If you do not wish to receive a confirmation email, leave the field blank.
 - **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** next to a **File Name** field to select a file (such as notice) to send with the request if desired. You can attach up to three files to a request.
 7. Click **Save**. You will automatically return to the main Calendar screen and receive an instant email acknowledgement of your request. Or click **Cancel** to return to the Calendar screen without saving your request.



NOTE

If you do not automatically return to the main Calendar screen after saving a request, check what version of Adobe Flash Player you have installed on your computer. RB Web requires Adobe Flash 9 or higher version.

Calendar

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.

Screenshot of the "Set Multiple Dates" window in Microsoft Internet Explorer. The window title is "http://www.reporterbase.com - Set Multiple Dates - Microsoft Internet Explorer". The "Schedule Type" dropdown is set to "Scheduler". Under "Occurs", "Weekly" is selected. Under "Weekdays", Monday, Tuesday, Wednesday, and Thursday are checked. Under "Duration", the Start Date is 12/4/2006, End Date is 12/11/2006, Start Time is 09:30 AM, and End Time is 05:00 PM.

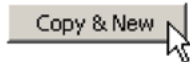
-
3. Click **OK**.
 4. Continue with the rest of Step 2 in “Entering new job requests from scratch.”

Calendar

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 automatically return to the main Calendar screen and receive an instant email acknowledgement of your request. Or click **Cancel** to return to the Calendar screen without saving your request.



NOTE

If you do not automatically return to the main Calendar screen after saving a request, check what version of Adobe Flash Player you have installed on your computer. RB Web requires Adobe Flash 9 or higher version.

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).

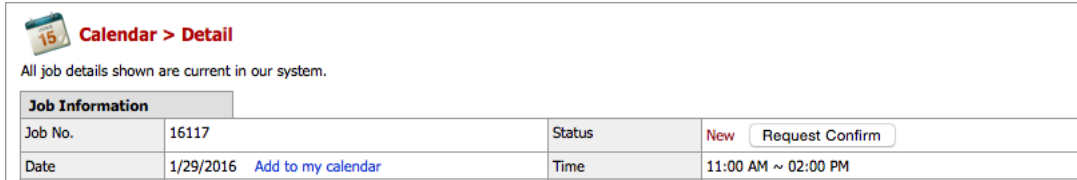


3. In the pop-up Request Cancel window, enter your name in **Cancelled by** field and the reason for canceling in **Reason** field.
4. Click **Save**. You will receive an instant email acknowledgement of your request. Or click **Close** to return to the Calendar Detail screen without saving your request.

Requesting job confirmations online

With the click of a button in a job detail screen in RB Web, you can send a request for job confirmation and receive an automatic confirmation email.

1. In the Calendar > Detail screen of a job, click **Request Confirm**.



Calendar > Detail
All job details shown are current in our system.

Job Information		Status	New	Request Confirm
Job No.	16117			
Date	1/29/2016 Add to my calendar	Time	11:00 AM ~ 02:00 PM	

2. In the Request Confirm Job pop-up window, **Confirmed by** and **Confirmed Email** are automatically filled in with your information. Enter information in **Remarks** if desired and click **Save**.



Request Confirm *: Required field

Confirmed by:*

Confirmation Email:*

For multiple email addresses, enter with comma(,) separation.

Remarks:
(maximum characters: 1900)

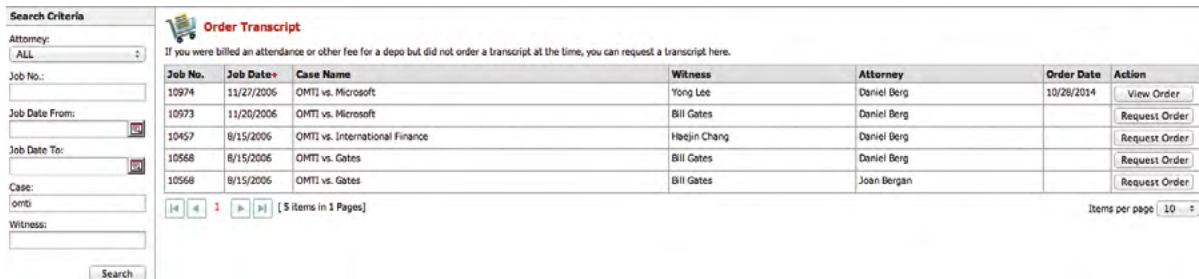
3. The pop-up window closes, and the job's **Status** in the main Calendar screen changes to Request Confirmed. You will also receive an automatic email confirmation.

Order Transcript

Requesting transcripts after the depo

If you were previously billed for appearance only on a depo, you can order a transcript for that job via RB Web.

1. Click **Order Transcript** in the navigation bar.
2. In the Order Transcript screen, enter the witness name in the **Witness** field, or use one or more search filters in the **Search Criteria** pane.
3. Click **Search**.
4. All billed jobs that fit your search criteria appear. Click **Request Order** next to the job you want a transcript for.
5. In the Order Transcript > Request Order screen, enter any necessary information, such as if this is a rush request and any required fields, and click **Submit**.
6. In the Order Transcript screen, the **Request Order** button for the job you selected changes to **View Order**. Click the button to review your order.



The screenshot shows the 'Order Transcript' interface. On the left is a 'Search Criteria' pane with fields for Attorney (set to 'ALL'), Job No., Job Date From, Job Date To, Case, and Witness. A 'Search' button is at the bottom. The main area is titled 'Order Transcript' and contains a table of jobs. Below the table are pagination controls showing '1' of 5 items in 1 page and an 'Items per page' dropdown set to 10.

Job No.	Job Date	Case Name	Witness	Attorney	Order Date	Action
10974	11/27/2006	OMTI vs. Microsoft	Yong Lee	Daniel Berg	10/28/2014	View Order
10973	11/20/2006	OMTI vs. Microsoft	Bill Gates	Daniel Berg		Request Order
10457	8/15/2006	OMTI vs. International Finance	Heejin Chang	Daniel Berg		Request Order
10568	8/15/2006	OMTI vs. Gates	Bill Gates	Daniel Berg		Request Order
10568	8/15/2006	OMTI vs. Gates	Bill Gates	Joan Bergan		Request Order

7. If you need to cancel the order before we begin production, click **View Order**, then in the Order Transcript > Request Order screen, click **Cancel Order**. In the popup window that appears, click **OK**.
8. Once a request has been accepted as a back order and production has begun, the order request is removed from the Order Transcript list. You can track your request's progress by its job date in Calendar.



TIP

Make it easier to find what you want by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many jobs appear on the screen at a time.



NOTE

If you want to cancel a request after production has begun, you must call our office.

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 From/To** – 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.
 - **Invoice No.** – To see a specific invoice, enter its invoice number in the field.
 - **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 From/To** – 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.
 - **Job No.** – To see the invoice for a specific job, enter its job number in the field.
 - **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.
3. 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. To view, print, or save the list as a PDF, click **View PDF version**.
6. Click an invoice number (highlighted in blue) for more details.
7. 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. (See “Downloading and reviewing files.”)
8. 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.
9. Click **Back** (located at the bottom of the screen) to return to the Activity screen.



TIP

Make it easier to find what you want by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many invoices appear on the screen at a time.

















Downloading transcripts

You don't have to wait to receive transcripts and their supporting files; 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 and their supporting files by selecting one or more search filters in the **Search Criteria** pane:
 - **Case** – To find transcripts and other files 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 From/To** – To find transcripts and other files 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 From/To** – To find transcripts and other files 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 and other files for a specific attorney, select one in the drop-down list.
 - **Search for Insurance Info** – To find files based on insurance claims, select a type of insurance information in the drop-down, then enter the specific item in the text field.
3. Click **Search**.
4. All potential matches to the information you entered appear with their associated files available for download.

Transcripts

To find transcripts and their related files, enter part of the case name and/or other search criteria, then click **Search**. You may also use job date or uploaded date range.

Witness	Job Date	Case Name	Case No.	Job No.		
<input type="checkbox"/> File Name	File Type	Description	Uploaded	Size(KB)	Reviewed	Action
Adam Banks	7/26/2013	OMTI vs. Microsoft	89 MC 560912-TV	13547		
<input type="checkbox"/> 114146_jb5213-CT.pdf	PDF Transcript		7/25/2013 4:50 PM	181	Mark as Reviewed	 
<input type="checkbox"/> 114146_jb5213-Word Index.pdf	PDF Transcript		7/25/2013 4:50 PM	114	Mark as Reviewed	 
<input type="checkbox"/> 114146_jb5213.pdf	PDF Transcript		7/25/2013 4:50 PM	661	Mark as Reviewed	 
<input type="checkbox"/> 114146_jb5213.txt	ASCII		7/24/2013 6:10 AM	329	Mark as Reviewed	 
<input type="checkbox"/> 88477 HONEYCUTT SUSAN 111913.txt	ASCII		12/4/2013 11:13 PM	49	Mark as Reviewed	 
<input type="checkbox"/> CAFFS ERIN.txt	ASCII		12/4/2013 11:13 PM	210	Mark as Reviewed	 
<input type="checkbox"/> Extremists.flv	Video		6/17/2014 10:08 PM	22,381	Mark as Reviewed	 
<input type="checkbox"/> Exhibit- Copy (2).pdf	Exhibit		7/24/2013 6:37 AM	194	Mark as Reviewed	 

5. To download files, see “Downloading and reviewing files.”



TIPS

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.

Make it easier to find what you want by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many files appear on the screen at a time.

Viewing transcripts online

Transcript Packages bundle your transcripts with their related exhibits, videos and other files into one package that you can view online. You can highlight and comment on transcripts and share your work with colleagues.

With Transcript Packages, you do not have to request copies of transcripts anymore. You can export transcripts from Transcript Packages in different formats and download your related case files.

1. Click **Transcript Packages** in the navigation bar.
2. In the Transcript Packages screen, search for transcript packages by selecting one or more search filters in the **Search Criteria** pane:
 - **Case Name** – To search 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.
 - **Word(s) in Transcripts** – To find transcript packages based on their content, enter part of a word (at least three characters), a whole word or a phrase.
 - **Job Date From/To** – To find transcript packages 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.
 - **Attorney** – To find transcript packages for a specific attorney, select one in the drop-down list.
3. Click **Search**.
4. All potential matches to the information you entered appear. If you searched for Word(s) in Transcripts, RB Web displays the section(s) of the file(s) where the text occurs with the text highlighted in red.

5. Click a blue file name to view its Transcript Package.



TIP

Make it easier to find what you want by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many transcript packages appear on the screen at a time.

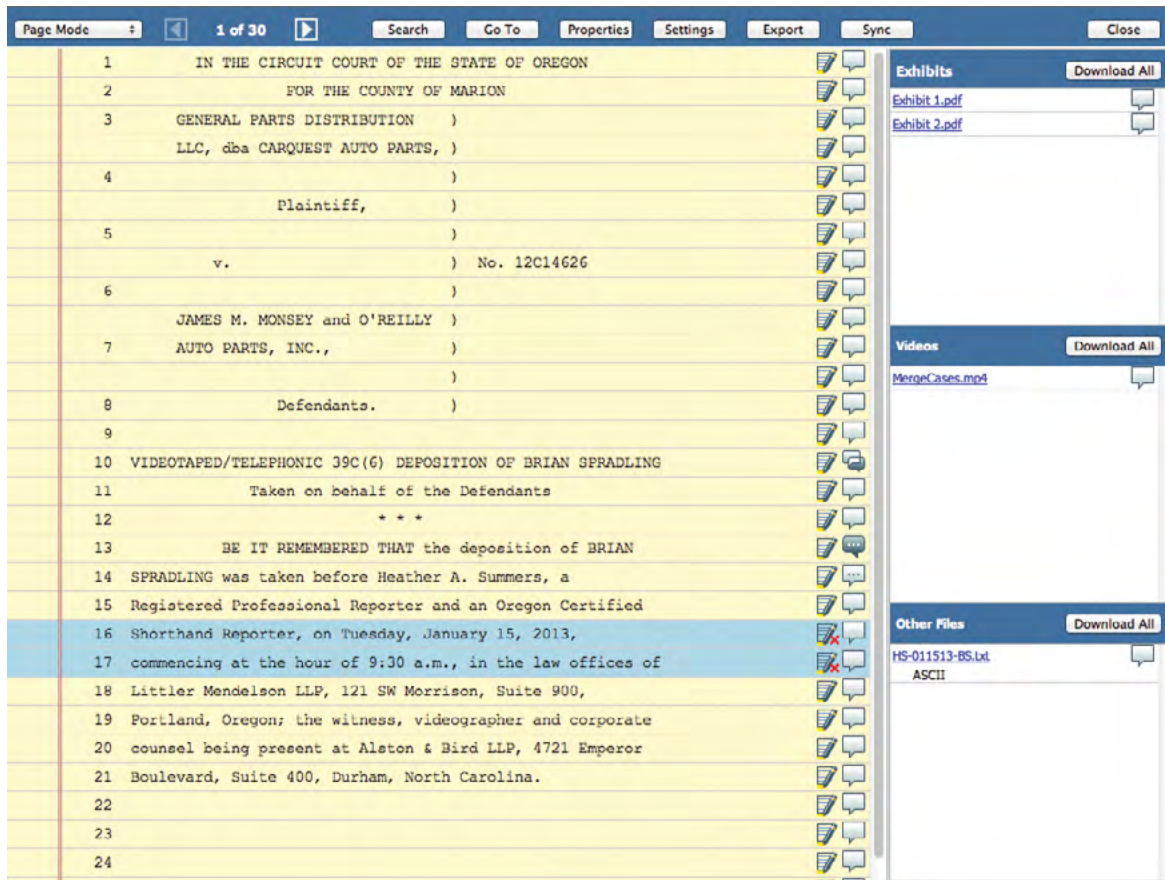


NOTES

You must have pop-up blocker disabled before clicking a Transcript Package link.

If the Pay Invoice pop-up appears when trying to view a Transcript Package, click **Close**, then click **Pay Invoices** in the main menu to find the related invoice to pay online. (See “Paying invoices online.”) Otherwise, contact the agency to pay the invoice.

6. The transcript appears in a pop-up Transcript Viewer. You can move through the transcript in several ways:
 - **Page Mode** – Click the forward and back arrows to move page by page through the document.
 - **Search** – See “Searching Transcript Packages.”
 - **Go To** – Click **Go To**, then enter a page number in the pop-up window and click **Go To** again. The transcript will automatically advance to the page specified.

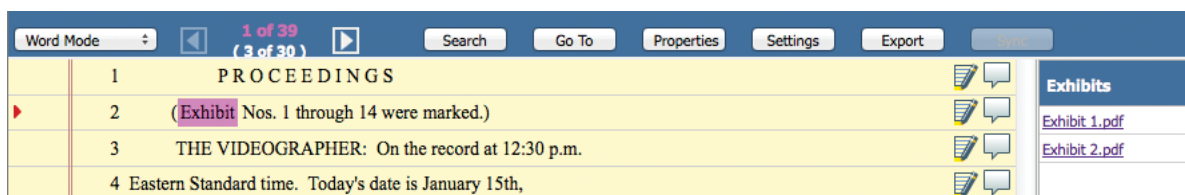


7. If the transcript has attached exhibits, videos or other files, they will be listed in designated sections in the Transcript Viewer. Depending on the file type, when you click its blue file name, it will:
 - Download automatically to your desktop (.txt files).
 - Ask you if you want to open the file when it downloads (.pdf files).
 - Play video or audio in a separate viewer (.mp4 files).
8. To view transcript details, such as the reporter’s name, click **Properties**. The Properties pop-up appears with current information about the transcript in a read-only format.
9. To change the transcript’s onscreen appearance, click **Settings**. View changes you make in Preview at the bottom of the screen. Click **Save** to update your settings.
10. To highlight and comment on the transcript, see “Highlighting and commenting on transcripts.”
11. To export different versions of the transcript, including condensed, word list, and highlights/comments to your desktop, see “Exporting transcripts.”

Searching transcripts

You can search for a word, phrase or part of a word in a transcript, and the Transcript Package viewer will find all instances of your search request, highlight them in the transcript, and provide a quick way to see each instance.

1. In the Transcript Viewer, click **Search**.
2. Enter your search word(s) in the pop-up window and click **Search**.
3. Page Mode changes to Word mode, jumps to the first instance of the text, highlights it, and displays the number of instances the text appears above the number of pages in the transcript at the top of the screen. Use the forward and backward arrows to see other instances of searched text.



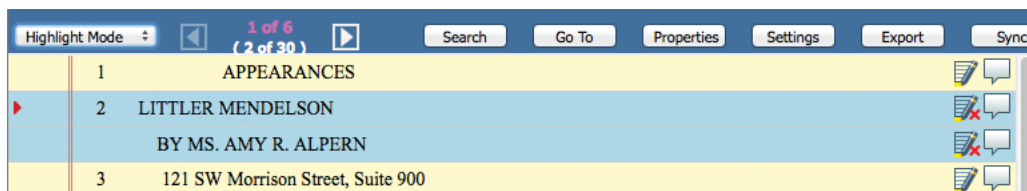
NOTE

Search is not case sensitive. You can enter a word with any combination of upper and lower case letters, and the Transcript Viewer will find all instances of the word regardless of capitalization.

Highlighting & commenting on transcripts

You can highlight and comment on transcripts, then share your work with colleagues.

1. To highlight a line of text in the Transcript Viewer, click the highlight (highlighter & paper) icon. The line's background changes to blue. To remove the highlighting, click the highlight icon again.
2. To find all highlighted text, click Page Mode at the top of the screen, then select Highlight Mode in the drop-down.
3. A red arrow appears at the first line of highlighted text, and displays the number of highlighted lines in the transcript above the number of pages in the transcript at the top of the screen. Use the forward and backward arrows to see other instances of highlighted text.



4. To add a comment to a line, click the line's comment (word balloon) icon.
5. In the Comments > New Comment window, enter your comment.

6. You can share your comment with:

- **No one** – Select None in the **Share With** drop-down. This is the default setting for sharing.
- **Specific colleagues** – Select Specific in the **Share With** drop-down. Then check the box(es) next to any attorney(s) whom you want to see your comment.



7. Click **Save**. The comment icon changes to a self-commented icon.



Self-commented icon

8. To find all commented text, click Page Mode at the top of the screen, then select Comment Mode in the drop-down.

9. A red arrow appears at the first line of commented text, and displays the number of commented lines in the transcript above the number of pages in the transcript at the top of the screen. Use the forward and backward arrows to see other instances of commented text.

10. To save and share your highlighting and comments, click **Sync**.

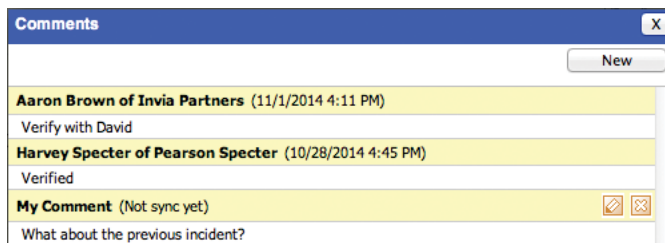
11. If other people have access to the same transcript and have made comments, click on commented icons to see their entries.



Others-commented icon

12. In the Comments window, all comments you are granted access to are listed. To add a comment, click **New**. Repeat steps 5-7.

13. Your comment appears at the end of the comment thread. Click the edit button (pencil) to change your comment or click the delete button to remove your comment.



14. Return to the Transcript Package viewer by clicking the close box. The icon changes to a comment-thread icon.



Comment-thread icon

15. To save and share your latest highlighting and comments, click **Sync**.

**NOTE**

As a reminder, whenever you close a transcript that you have highlighted or commented on but not synced, a dialog box appears alerting you that you haven't saved your changes to the document. Click **Cancel** to return to the Transcript Viewer, then click **Sync**.

Transcript Packages

Exporting transcripts

You can export transcripts from Transcript Packages in several formats.

1. In the Transcript Viewer, click **Export**.
2. In the Export window, click the button for the export option you want, then click **Next**:
 - **Full-page Transcript** – In the Export > Full Transcript screen, select formatting for margins, borders & line numbers, fonts, and Q&A.
 - **Condensed Transcript** – In the Export > Condensed Transcript screen, select visual formatting as for full-page transcripts, plus Page formatting, such as how many condensed pages on a sheet, the order in which they should read, and whether to exclude front and back pages from condensing.
 - **Word Index** – In the Export > Word Index screen, select visual formatting similar to for full-page transcripts, plus how many columns per page you want the words to list in.
 - **Word List** – In the Export > Word List screen, select formatting as for Word Index, plus select whether to include the count for how often each word appears in the transcript in the Word Count drop-down.
 - **Highlights & Comments** – In the Export > Highlights & Comments screen, select what content you want to export.
3. Click **Export**. Exported AMICUS files automatically open in your default text application. All other exported documents automatically open in Adobe Reader or Acrobat.

**NOTE**

If you want to export Highlights & Comments, you must first sync any unsaved highlights and comments.

**TIP**

When exporting Highlights & Comments, select “Highlights and my comments” for working offline. Or select “Comments from others only” so you don't overlook any items that require your reply.

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 **Repository** in the navigation bar.
2. In the Repository screen, search for a file by selecting one or more search filters in the **Search Criteria** pane:
 - **Case** – 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.
 - **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/From** – 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.
3. Click **Search**.
4. All files matching your search criteria appear. To download files, see “Downloading and reviewing files.”
5. Click **Back** to return to the Repository.



NOTE

In addition to transcripts, case files and invoices, 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. Non-case files are stored in a separate repository. To access these files, click **Firm-wide Repository**.



TIPS

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 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.

Make it easier to find what you want by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many files appear on the screen at a time.

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.

- To make an inquiry, click **Support** in the navigation bar.
- All of your previous unresolved inquiries are listed in the Support screen. Click **New Ticket**.
- 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.
- Click **Save**. Or click **Cancel** to return to the Support screen without saving your request.
- In the main Support screen, by default the enquiries are listed in chronological order, with the oldest first. You can:
 - Change the order of the tickets** – Click the **Ticket No.** heading to reverse the order.
 - Limit which tickets appear** – Use Search filters to see only open or closed tickets for a specific time period.
 - Limit how many tickets appear at a time** – Choose a value in the **Items per page** drop-down.
- Click the ticket number of any listing to view its details and continue the discussion.

 **Support**

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. New Ticket

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

- In Support > View Ticket, you can:
 - View the history of the selected ticket** – including who said what and when in the ticket's comment thread.
 - Add a new comment** – in the **Comment** field, then click **Update Ticket**.
 - Close the ticket** – When your question has been answered or the matter has been resolved, click one of the ratings buttons to rate our response and remove the ticket from your list of inquiries in the Support screen.



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.”)

Pay Invoices

Paying invoices online

If you have the option, 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. Click **Pay Invoices** in the navigation bar.
2. In the Pay Invoices screen, enter an **Invoice No.** or **Job No.** in the appropriate field or select an attorney from your firm in the **Attorney** drop-down.
3. All open (unpaid) invoices that meet the search criteria appear, sorted by invoice number. Check the **Pay** box next to each invoice you want to pay.

 **Pay Invoices**


Pay multiple invoices at once by checking their **Pay** boxes, then clicking **Proceed**.

Invoice No. *	Invoice Date	Invoice Amount	Balance	Job No.	Job Date	Case Name	Bill To Attorney	Pay
7820	3/26/2014	214.72	236.19	12603	7/22/2008		Daniel Berg	<input type="checkbox"/>
7845	7/8/2014	392.59	431.85	13575	7/17/2014		Daniel Berg	<input type="checkbox"/>
7873	10/24/2014	0.59	0.59	1513	9/30/2005	Dodson vs. Rocha, et al.	Daniel Berg	<input type="checkbox"/>
7875	10/29/2014	0.59	0.59	13508	10/3/2012	Jones vs. Pfizer	Daniel Berg	<input type="checkbox"/>

1 2 3 4 5 6 7 8 9 10 [94 items in 10 Pages] Items per page 10

Proceed

4. Click **Proceed**.
5. In Pay Invoices > Pay Now, 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.

 **Pay Invoices > Pay Now**

To pay the invoice described in Billing Detail, enter your credit card information and billing address.

Card Information *: Required field

Card Type:* Card Number:*

Exp. Date:* /

Billing Information

Same as my profile

First Name:* Last Name:*

Email:*

Address:*

City:* State:*

Post Code:*

Billing Detail

Invoice No.	Invoice Date	Invoice Amount	Balance	Job No.	Job Date	Case Name
7820	3/26/2014	214.72	236.19	12603	7/22/2008	
7845	7/8/2014	392.59	431.85	13575	7/17/2014	
Total Amount			\$ 668.04			

Pay Now **Cancel**



TIP

Make it easier to find what you want by choosing between 10, 20 and 50 in the **Items per page** drop-down to limit how many invoices appear on the screen at a time.