



# **RB Connect Mobile User Guide**

**for attorneys, paralegals, and secretaries**

**version 9.13**

# RB Connect Mobile User Guide

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# Program Basics

RB Connect Mobile is an online service that works within a browser on your smartphone, tablet, or other mobile device. There is nothing to install on your own hardware.

Familiarize yourself with RB Connect Mobile with these basics first:

- [Log in](#)
- [Interface](#)
- [Help](#)
- [Personal options](#)

## **NOTE: Automatic time-out**

RB Connect Mobile automatically times out after 20 minutes. Online timeouts are required for security reasons. RB Connect Mobile does not save your work or remember which functions you were using. Be sure to **save frequently and especially before switching to a different a function or leaving your device.**

# Jobs

Request depos and other jobs, view and manage current jobs.

## Reference

- [Job](#)

## Step-by-step instructions

- [Viewing your calendar](#)
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# Order Transcript

If you were previously billed for appearance only on a depo, you can order a transcript for that job from your smartphone or other mobile device.

## Step-by-step instructions

- [Requesting transcripts after the depo](#)

## Account Activity

See at a glance which invoices have been paid and what you still owe. Filter invoices by date, attorney, invoice or job number, case name, or client matter number. View all or only paid or unpaid invoices. Review the details of any invoice. Download copies of invoices. Pay any outstanding invoices from your smartphone or other mobile device.

### Step-by-step instructions

- [Viewing account activity](#)

# Transcript Packages

**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 make notes on transcripts.

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

## Step-by-step instructions

- [Viewing transcripts on your device](#)

# Repository

**Repositories** are where downloadable files are stored.

## Step-by-step instructions

- [Using repositories](#)
- [Searching repositories](#)
- [Viewing & downloading attached files](#)



# Reward Points

Redeemable **Reward Points** are earned from booking certain services with us. You can use your points yourself or transfer them to someone else in your company.

## Step-by-step instructions

- [Viewing reward points](#)
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# Support Tickets

Ask questions and get answers while maintaining a paper trail of your issues.

## Step-by-step instructions

- [Asking for help & other information](#)
- [Following up on support tickets](#)
- [Re-opening support tickets](#)

## Your personal options

Update your contact information, view announcements, change your password and other preferences, or log out of the program.

- [My Profile](#)
- [Announcements](#)
- [Change Password](#)
- [Preferences](#)
- [Log Out](#)

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# Log in

RB Connect Mobile is a secure website that follows general security rules for business applications. Access to RB Connect Mobile is through our web address in a browser using your assigned credentials. If you do not have access, contact us.

RB Connect Mobile is optimized to work in all of the common browsers in the following order:



## Step-by-step instructions

- [Logging in](#)
- [Setting your password at log-in](#)



# RB Connect Mobile interface

RB Connect Mobile has a simple interface to make it easy to navigate and load as fast as possible over the internet.

- [Functions](#)
- [Function layout](#)
- [Repository](#)

# Help

Contextual help is always available from the menu bar by clicking **Help**. The entire RB Connect Mobile user guide is accessible here, but initially the information that is most relevant to the currently open and active function appears.

# Job


In most instances, a **job** is the reporting of a deposition.

## Step-by-step instructions



- [Viewing your calendar](#)
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## Viewing your calendar

Find jobs using various search criteria. View details of existing jobs, update job requests, reschedule or cancel jobs, and request new jobs.

1. To see your scheduled depots and other jobs, click .
2. On the menu page, click **Jobs**.
3. Depending on the default **View Style** set in Preferences (see [Setting preferences](#)), either the current calendar month appears (Calendar view) or the **Search By** pane appears (List view). To:

- **View other months in monthly calendar**

- To move to the previous month, click .
- To move to the next month, click .
- To choose a different month, click the month name, then select from the twelve months that appear.

- **View list-style calendar or search calendar**

To view jobs in a list instead of a monthly calendar, or to search for specific jobs, see [Searching your calendar](#).

- **View job details**

You can view job details, but not edit them.

1. Depending on your View Style:
  - **In Calendar view**, dates with scheduled jobs have a gray dot under the date. Click the date you want to view. Jobs scheduled for that day appear in a list below the calendar.
  - **In List view**, jobs that fit your search criteria are listed in chronological order.
2. Click a job in the list to view details. See [Viewing job details](#).

4. To request a new job, click . See [Requesting jobs](#).

## Reference

- [Job](#)
- [Preferences](#)

## Step-by-step instructions



- [Setting preferences](#)
- [Searching your calendar](#)
- [Viewing job details](#)
- [Requesting jobs](#)

## Requesting jobs

You can set up a job with only the job date and time, leaving other information as is (blank or filled with your defaults). You can also submit requests with additional information, such as witness, case, job location, and bill to client.

You can schedule a single job, or if you have a series of upcoming jobs for a case, you can [set the jobs all at once](#).

### 1. Start a new request

1. To make a new job request, click .
2. Click **Jobs** on the menu page.
3. (If you are in List View, click  first.) Click . The Request New Job page opens.

### 2. Enter required job info

1. In the Request New Job's **General** pane:
  - **\*Job Date**  
*Required.*
    - **If this is a single job**, click in the field, then scroll to the desired month, day, and year. Click **Set** to select the date the job will take place.
    - **If this is a job with multiple dates**, see [Creating recurring jobs](#).
  - **\*Start Time/\*End Time**  
*Required.* To set the job's time range, click in each field and scroll to the desired hour, minute, and AM/PM. Click **Set** to select the time.
  - **\*Time Zone**  
*Required.* Change if the job will take place in a different time zone than your default. Click in the field, then scroll to the desired time zone and click **Set**. Your default time zone is set in [Preferences](#).

2. To enter other information in the **General** pane, see [Entering general job information](#).
3. Scroll to the **Ordering Client** pane. **Ordering Firm** and **Scheduled By** are not editable. You can update:

- **\*Ordering Contact**

*Required.* If you are not the person requesting the job, click in the field, then scroll to the contact responsible for the job and click **Set**.

- **Request Services**

If you have this option and you have specific needs for a job and this option appears, see [Requesting additional services on a job](#).

### 3. **Enter additional job info (optional)**

You can enter other job information, if desired:

- **General**

To enter basic job information, such as the witness, case, and job type, see [Entering general job information](#).

- **Job Location**

If the job will be at your office, click **Same Location as Ordering Firm**. Otherwise, see [Entering job locations](#).


- **Billing Information**

if the person designated as the **Ordering Contact** for this job is also responsible for paying the job's invoice, check the **Bill To Contact is the same as Ordering Contact** box. Otherwise, see [Entering billing information](#).

#### **NOTE: Custom pane for other job information**

To minimize the amount of information you enter by hand, there might be an additional pane on the Request New Job page with fields and options you can use instead to give us more information about the job request.

### 4. **Send job request**

Click . Your request is sent automatically.

- If you made any errors or have additional information, you can update the request's information as long as its **Job Status** in the Jobs window is "Request New."

- If the job status has changed and you need to make changes to the request, see [Changing job requests](#).
- If you need to reschedule the job, see [Rescheduling jobs](#).
- If you need to cancel the job, see [Canceling jobs](#).

## Reference

- [Job](#)




## Step-by-step instructions


- [Creating recurring jobs](#)
- [Setting preferences](#)
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- [Requesting additional services on a job](#)
- [Entering job locations](#)
- [Entering billing information](#)
- [Changing job requests](#)
- [Rescheduling jobs](#)
- [Viewing your calendar](#)



## Requesting transcripts after the depo

You can order transcripts for any jobs that you scheduled or were a party to that have already been billed. For example, if you were previously billed for appearance only on a depo, you can order a transcript (back order) for that job online.

1. To back order a transcript, click .
2. On the menu page, click **Order Transcript**.
3. On the Order Transcript page, no specific filter is required, but you must use at least one filter:
  - **Contact**  
Default is ALL. To find transcripts for yourself or another person at your firm, click in the field. Then scroll to a name and click **Set** to select it.
  - **Job No.**  
To see transcript(s) for a specific job, click in the field. Enter the job number using the keypad. Then click **Set**.
  - **Job Date From/Job Date To**  
To see transcript(s) for jobs within a specific date range, click in the field, then scroll to a month, day, and year. Click **Set** to select the date.
  - **Case**  
To see transcript(s) for a specific case, click in the field, then enter part of the case name using the keyboard. Click  to move to the next field or click **Done** to exit the keyboard.
  - **Witness**  
To see transcript(s) for a specific witness, click in the field, then enter part of a deponent's name using the keyboard. Click **Done** to exit the keyboard.
4. Click .



5. All billed jobs that fit your search criteria appear. Click the job you want a transcript for.
6. On the Request Order page, if you have the option, enter information about your request.
7. Click . Your request is automatically sent to our office. You will receive an email to confirm that we have received and are processing your request.

**NOTE: You cannot cancel a request online**

If you want to cancel a submitted request, you must call our office.

## Viewing account activity

See which invoices have been paid and what you still owe. Filter invoices by different criteria. Review the details of any invoice. Pay any outstanding invoices online.


1. To see and pay invoices, click .
2. On the menu page, click **Account Activity**.
3. On the Account Activity page, click  to see your recent invoices (billed during the last 30 days), sorted by invoice number.
4. To see other invoices, use one or more search filters:
  - **Contact**  
Default is ALL. To find invoices for a specific person, click in the field. Then scroll to a name and click **Set** to select it.
  - **Account Status**  
Click in the field, then scroll to an option and click **Set** to select it:
    - **ALL** – Default. To view both outstanding and paid invoices.
    - **Show Open Invoices Only** – To view only outstanding invoices.
    - **Show Paid Invoices Only** – To view only paid invoices.
  - **Date Type**  
Click in the field, then scroll to an option and click **Set** to select it:
    - **Invoice Date** – Default. To see invoices by billed dates.
    - **Job Date** – To see invoices by scheduled job dates.
  - **Date From/Date To**  
Click in the field, then scroll to a month, day, and year. Click **Set** to select the date.
  - **Invoice No.**

To see a specific invoice, click in the field. Enter the invoice number using the keypad. Then click **Set**.

- **Job No.**

To see the invoice for a specific job, click in the field. Enter the job number using the keypad. Then click **Set**.

- **Case**

To see invoices for a specific case, click in the field, then enter part of the case name using the keyboard. Click  to move to the next field or click **Done** to exit the keyboard.

- **Client Matter No.**

To see invoices for a specific client matter number, click in the field, then enter the client matter number using the keyboard. Click **Done** to exit the keyboard.

5. Click .

6. All potential matches to the information you entered appear in chronological order, oldest first. To view information about an invoice, download its PDF version, or pay an invoice, see [Viewing invoice details](#).




### **Step-by-step instructions**

- [Viewing invoice details](#)





## Viewing transcripts on your device

When you receive notification that a transcript package is available, or anytime you want to work with your transcript packages, find them in this function. In a transcript package on a mobile device, you can search its contents, highlight content, make notes, view/print/save attached files, and export the transcript in different formats.

### 1. Find your transcripts



1. To see your transcript packages, click .
2. On the menu page, click **Transcript Packages**.
3. To see all of your transcript packages click in the **Contact** field on the Transcript Packages page. Then scroll to your name and click **Set** to select it.
4. Click . All of your transcript packages appear in a list. If you want to refine your search, click  to return to the **Search By** pane and see [Finding transcript packages](#).

### 2. View a transcript

1. Click a transcript package in the search results.
2. The transcript appears in the View Transcript Package window. You can move through the transcript in several ways:
  - Click  and  to page through the document.
  - Click  > **Search**. See [Searching within transcripts](#).
  - Click  > **Go To**, then click in the field. Enter a page number using the keypad. Then click **Set**. The transcript will automatically advance to the page specified.

### 3. Work with the transcript

1. To highlight lines in the transcript, see [Highlighting transcripts](#).
2. To make notes on the transcript, see [Making & viewing notes](#).

3. To view a [linked exhibit](#), click its hyperlinked text in the transcript. The exhibit opens in a new window in your browser.
4. To see attached exhibits, videos or other files, see [Working with attached files](#).
5. To export different versions of the transcript, including condensed, word list, and highlights/notes to your device, see [Exporting transcripts](#).
6. To view transcript details, such as the witness's name, click  > **Properties**. The **Properties** panel appears with current information about the transcript in a read-only format. When finished, click **OK**.
7. When finished, click  to return to the Transcript Packages page.

## Reference

- [Linked exhibits](#)

## Step-by-step instructions

- [Finding transcript packages](#)
- [Searching within transcripts](#)
- [Highlighting transcripts](#)
- [Making & viewing notes](#)
- [Working with attached files](#)
- [Exporting transcripts](#)

## Using repositories

Search for files in a repository. Download files to your browser for viewing, printing, emailing, etc.

- **Searching repositories**

Search for files in a repository. Use filters to narrow results returned.

See [Searching repositories](#).

- **Viewing files**

You must download a repository file to your browser view it. Depending on your browser, you can also save, print, email or perform other functions with the file.


See [Viewing & downloading attached files](#).

### Step-by-step instructions

- [Searching repositories](#)
- [Viewing & downloading attached files](#)

## Searching repositories

Search for files in your case and personal repositories. Use filters to narrow results returned.

1. To see your files, click .
2. On the menu page, click **Repository**.
3. In the Repository page's **Search By** pane, find files in specific repositories. Use filters to narrow your search:
  - **Repository Type**


To change which repository is searched, click in the field. Then scroll to the repository you want and click **Set** to select it.

    - **Case Repository** – Default. Files tied to your jobs and cases. No other specific filter is required, but you must use at least one other when searching your case repository.
    - **Personal** – Files not related to jobs/cases, such as contracts.
  - **Contact**


*Case Repository only*

Default is ALL. To find invoices for a specific person, click in the field. Then scroll to a name and click **Set** to select it.
  - **Case Name**

*Case Repository only*

To see files for a specific case, click in the field, then enter part of the case name using the keyboard. Click  to move to the next field or click **Done** to exit the keyboard.
  - **Case No.**

*Case Repository only*

To see files for a specific case number, click in the field, then enter the case number using the keyboard. Click  to move to the next field or click **Done** to exit the keyboard.




- **Job No.**

*Case Repository only*

To see files for a single job, click in the field, then enter the job number using the keypad. Click **Done** to exit the keypad.

- **Witness**

*Case Repository only*


To see files for a specific witness, click in the field, then enter part of the witness name using the keyboard. Click  to move to the next field or click **Done** to exit the keyboard.

- **File Type**

*Case Repository only*

Default is ALL. Click in the field, then scroll and click any specific types to select them. When finished, click **Set**.

- **File Name**

To find a particular file, click in the field, then enter part of the file name using the keyboard. Click  to move to the next field or click **Done** to exit the keyboard.

- **Word Search Type**

*Case Repository only*

To find files that contain specific words, click in the field. Then scroll to a filter and click **Set** to select it.

- **All of the words** – Default. To find files that contain instances of all the words you entered.

- **Any of the words** – To find files that contain instances of one or more of the words you entered.

- **The exact phrase** – To find your selection as you typed it.

- **Words to search for**

*Case Repository only*

Click in the field, then enter text you want to find using the keyboard. Click **Done** to exit the keyboard.

- **Job Date From/Job Date To**


*Case Repository only*

To see files associated with jobs within a specific date range, click in each field, then scroll to a month, day, and year. Click **Set** to select the date.

- **Upload Date From/Upload Date To**

*Case Repository only*

To see files uploaded to the repository within a specific date range, click in each field, then scroll to a month, day, and year. Click **Set** to select the date.

4. Click . All files that fit the search criteria are listed. To save/view files, see [Viewing & downloading attached files](#).

**NOTE: Not all files are text-searchable**

If you want to search for files in your repository by words or phrases in the documents themselves, the agency must index the files to be text-searchable first. Files that contain extractable text, such as ASCII files or PDFs, can be indexed. Other types of files, such as image files (.png, .jpg, .gif) or non-text files, such as eTranscript PTX, cannot be indexed.

**Step-by-step instructions**

- [Viewing & downloading attached files](#)

## Viewing & downloading attached files

You can select files to view/download from within a job or in the Repository.

### 1. Find file

- **From the central repository**



To find files in **Repository**, see [Searching repositories](#).

- **From a job**

On a Job page, scroll to the **Repository** pane.

### 2. View file

1. Click the file you want to download/view.

2. On the View File page, click . If the Pay Invoice page appears, you must pay the invoice first before you can download the file. Click  and follow the instructions in [Paying invoices via mobile](#).

3. Choose:

- **View:** The file opens in your browser.
- **Download:** Depending on your browser, you will be able to save, print, or perform other functions with the file.

### Reference




- [Jobs](#)

### Step-by-step instructions

- [Searching repositories](#)
- [Paying invoices via mobile](#)

## Viewing reward points

Check how many points you have available currently and in the future. Look up your previous point history.

1. To view your points in RB Connect Mobile, click .
2. On the menu page, click **Reward Points**.
3. On the Reward Points page:
  - **\*Activity Date From**  
*Required.* Defaults to 30 days ago. Change the beginning of the date range, if desired, by selecting new month/day/year in the spinners, then clicking **Set**.
  - **\*Activity Date To**  
*Required.* Defaults to today. Change the end of the date range, if desired, by selecting new month/day/year in the spinners, then clicking **Set**.
  - **Activity Type**  
Default is ALL. To see points related to a single reward activity, select it in the spinner, then click **Set**:
    - **Earn** – Points accrued through services ordered and paid for.
    - **Adjustment** – Points added or subtracted by an administrator.
    - **Transfer** – Points gifted to or from another person (see [Transferring reward points](#)).
    - **Redeem** – Points you have applied to rewards (see [Redeeming reward points](#)).
4. Click . Any reward point activity that meets the search criteria is listed. Click **>** next to an entry for details. Or click  **>**
  - **Current Points Statement**  
To see an overview of your points:

- **Current Points** – Your currently redeemable points, which are calculated from paid invoice amounts minus any already redeemed or transferred points.
- **Pending Points** – Points of all posted invoices that haven't been paid yet. When an invoice is paid, points earned on that invoice are automatically moved from **Pending Points** to **Current Balance** and are redeemable.
- **Points Earned** – Amount displayed includes all redeemable points earned since account was opened, including those already redeemed or transferred.
- **Points Spent** – Amount shown is all redeemed and transferred points since account was opened.
- **Request Redemption**  
To redeem points. See [Redeeming reward points](#).
- **Transfer Points**  
To transfer points to a colleague at your firm. See [Transferring reward points](#).



### Step-by-step instructions

- [Redeeming reward points](#)
- [Transferring reward points](#)

## Redeeming reward points

Redeem any amount of points up to your currently available points for rewards.

Continued from [Viewing reward points](#).

1. On the Reward Points page or Current Points page, click  > **Request Redemption** to redeem your outstanding points.
2. On the Request Redemption page:
  - **\*Redemption Method**  
*Required.* Choose a reward type in the spinner, then click **Set**.
  - **\*Points to Redeem**  
*Required.* Use the keypad to enter the number of points you want to redeem, then click **Done**.
  - **Deliver To**  
Select the address in the spinner you want your reward sent to, then click **Set**:
    - **Use the firm address** – Default. Your company address as listed in [your profile](#).
    - **Use the home address** – Your personal address in our records.
    - **Manually type the delivery address in Remarks** – Select this option to send your reward to a different address.
  - **Remarks**  
Enter any special instructions in regards to this request in this field, plus the delivery address if you selected in **Deliver To**:
    - **Use the home address**, and you are not sure we have your correct address.
    - **Manually type the delivery address in Remarks**.
3. Click . Your request is sent to our office, the Request Redemption page closes, and your request's **Status** is listed as "Pending" on the Reward Points page.



## Step-by-step instructions

- [Viewing reward points](#)

## Transferring reward points

Transfer points to other people in your firm. You can transfer any amount of points up to your currently available points.

Continued from [Viewing reward points](#).

1. On the Reward Points page or Current Points page, click  > **Transfer Points** to redeem your outstanding points.
2. On the Transfer Points page:
  - **\*Transfer To**  
*Required.* Choose the person you want to gift points to in the spinner, then click **Set**.
  - **\*Points to Transfer**  
*Required.* Use the keypad to enter the number of points you want to give to the person, then click **Set**.
3. Click . Your request is sent to our office, the Transfer Points page closes, and your request's **Status** is listed as "Pending" on the Reward Points page.




### Step-by-step instructions

- [Viewing reward points](#)



## Asking for help & other information

If you have the option, you can ask questions and make requests on your mobile device with Support Tickets. After making an inquiry, you can track its resolution and continue the discussion with us through this function.







1. To make an inquiry in RB Connect Mobile, click .
2. On the menu page, click **Support Tickets**.
3. On the Support Tickets page, any unresolved inquiries are listed (see [Following up on support tickets](#)). To start a new ticket, click .
4. On the New Ticket page, enter the following information by clicking in the fields and using the keyboard (see [Filling in RB Connect Mobile forms](#)):
  - **\*Subject** – *Required*. A descriptive title for your inquiry will make it easier to track if you have multiple inquiries.
  - **\*Problem/Question** – *Required*. A detailed description will help us understand your inquiry and resolve it sooner.
5. Click .
6. To see answers and respond, see [Following up on support tickets](#).

### Step-by-step instructions

- [Following up on support tickets](#)
- [Filling in RB Connect Mobile forms](#)

## Following up on support tickets

After [making an inquiry](#) using Support Tickets, track its resolution and continue the discussion with us online. When the issue has been resolved, close the ticket. Re-open closed tickets to resume the conversation.







1. To find tickets, click .
2. On the menu page, click **Support Tickets**.
3. All open (currently unresolved) tickets are listed by default on the **Support Ticket** page. Open tickets include:
  - **Awaiting Response:** We have not replied to your issue yet.
  - **Pending Customer Response:** We have sent a reply and are awaiting your response.
4. Click  next to a support ticket to see details and respond.
5. On the View Ticket page, no fields are editable. You can read the Support Team's response to your inquiry at the bottom of the **Threads** field.
6. Click  
  - **Reply**  
To respond to the Support Team's message. On the Reply Ticket page, click in **\*Message** (*required*) to enter your response using the keyboard. Click **Done**, then click  to send your message.
  - **Close Ticket**  
If you have determined the issue has been resolved. On the Close Ticket page, select one of the rating boxes to rate our performance, then click  to inform us that you have closed the ticket.
7. If you have closed a ticket, but would like to resume the discussion, you can re-open the ticket. See [Re-opening support tickets](#).

## Step-by-step instructions

- [Asking for help & other information](#)
- [Re-opening support tickets](#)

## Re-opening support tickets

You can re-open a closed or solved ticket at a later date if you want to restart the conversation. Closed tickets are tickets you have determined are resolved and have rated our performance. Solved tickets are ones which we closed because we have determined that the issue was resolved.

1. To find closed/solved tickets, click .
2. On the menu page, click **Support Tickets**.
3. On the Support Tickets page, click .
4. Click in the **Ticket Status** field and select **Closed** in the spinner, then click **Set**.
5. You can narrow your results by selecting dates in the **Issued Date From** and **Issued Date To** spinners to see tickets initiated within those dates. See [Filling in RB Connect Mobile forms](#).
6. Click . All of the support tickets that meet the specified search condition(s) from the newest to the oldest appear.
7. Click  next to the support ticket you want to follow up on. You can review the reply chain under **Threads**.
8. To resume the conversation, click  > **Reopen Ticket**.
9. On the Reply Ticket page, click in **\*Message** (*required*) to enter your response using the keyboard. Click **Done**, then click  to send your message.

### Step-by-step instructions

- [Filling in RB Connect Mobile forms](#)
- [Following up on support tickets](#)

# My Profile


Update your contact information at any time.

## Step-by-step instructions

- [Updating your profile](#)

# Announcements

The Announcements page automatically appears everytime you sign into RB Connect Mobile.

To view the Announcements page anytime within the application, click , then click **Personal** > **Announcements** on the menu page.

# Change Password

When you are first given access to RB Connect Mobile, you are issued a password. You can change this password at any time.

## Reference

- [Strong password](#)

## Step-by-step instructions

- [Updating your password](#)

# Preferences

Set preferences to customize your experience in RB Connect Mobile.

## Step-by-step instructions

- [Setting personal preferences](#)



# Log Out

You are automatically logged out after 20 minutes of inactivity for security reasons. You can also manually log out.

## Step-by-step instructions

- [Logging out](#)

## Logging in

You can use RB Connect Mobile anywhere you have internet access through a browser. All you need is the URL, your user name (most likely your work email address) and password or a social media account.

On the log-in page, either:

- **Enter your credentials**

1. **Login Email/Login Name**

Click in the field and:

- Enter your work email address or the login name assigned to you using the keyboard, then click **Done**.
- Use an autofill option.

2. **Password**

If you didn't use an autofill option, click in the field and enter the password assigned to you. Then click **Done**.

3. Click **Login**.

**TIP: Setting your password from log-in page**

If you don't have a password or forgot your password, you can set it yourself. See [Setting your password at log-in](#).

- **Sign in with social media**

If you have the option, you can sign in using your social media account by clicking one of the social media buttons (Facebook, Google+, or LinkedIn), then entering your login credentials for that account.

**TIP: Perks of social media sign-in**

If you sign in through social media, you don't have to keep track of another online account (for RB Connect Mobile). Plus you don't need to know your password. However, your social media account must be registered to the same work email address you provided to us.

**NOTE: Verify your device**

If you are signing in on a device for the first time or on a non-“trusted” device, e.g., a public computer, you might be asked to verify the device first. See [Verifying your device](#).

**Step-by-step instructions**

- [Setting your password at log-in](#)
- [Updating your password](#)
- [Verifying your device](#)

## Setting your password at log-in

If you don't have a password or forgot your password, you can set a new one from RB Connect Mobile's Log-in page.

1. On the log-in page, click **Forgot Password**.
2. On the Forgot Password page, enter your **Login Email** or **Login Name**, then click **Submit**. In the popup that appears, click **OK**.
3. If your log-in email/name is in the system, you will receive an automated email. Click the link in the email to go to the Reset Password page. You have 24 hours from the time you submitted your request to click the link.
4. On the Reset Password page, enter a [strong password](#) in **New Password** and **Confirm Password** (*both required*), then click **Submit**.

### **TIP: Avoid account lock-outs**

If you attempt to log into RB Connect Mobile with an incorrect password too many times, it will lock you out of the system. The only way to unlock your account is to contact an administrator. Instead of going through this hassle, use **Forgot Password** to set a new password and avoid being locked out of your RB Connect Mobile account.

### **NOTE: Changing your password**

In addition to the **Forgot Password** option, you can [change your password](#) within RB Connect Mobile at any time.

### **Reference**

- [Strong password](#)

### **Step-by-step instructions**

- [Updating your password](#)

# Strong password

For a password to be strong, it should:

- Be at least eight characters long.
- Contain characters from each of: upper-case letters, lower-case letters, numerals, and symbols.
- Not contain your name, login name, or birthday.
- Not contain 3 or more characters in sequence (e.g., 123 or abc).

## Step-by-step instructions

- [Updating your password](#)
- [Setting your password at log-in](#)

## Verifying your device

If you are signing in on a device for the first time or on a non-“trusted” device, e.g., a public computer, you might be asked to verify the device before you can access the site using [two-factor authentication \(2FA\)](#).

Continued from [Logging in](#).

1. If the Request Verification Code screen appears, click the radio button for where you want your verification code sent (e.g., email address or mobile phone), then click **Request**.
2. Check your messages for the code, then enter the code in the Verification Code screen’s boxes. You have 5 minutes from when you requested a code to enter the code. If you miss the deadline, repeat these steps again. If you did not receive a message with a code, click **Didn’t Get a Code** and follow the instructions.
3. If this is a device that you want to sign in on without entering a verification code each time, leave **Remember this browser as trusted browser** checked. If you are logging in on a public device or a device you want to verify each time, uncheck the box. Click **OK**.

### **NOTE: Do you trust this device?**

If you use RB Connect on public machine, for example, a shared device or a computer in a public library, remember to uncheck the **Remember this browser as trusted browser** checkbox. If you leave it checked, the browser will be registered as trusted browser, and RB Connect will not ask for two-factor authentication again within 2 years unless you delete the browser's cookie manually.

### Reference

- [Two-factor authentication \(2FA\)](#)

# Two-factor authentication

**Two-factor authentication (2FA)** is a way to more securely confirm a user's identity by adding a second factor to signing in with a user name and password. In RB Connect, 2FA uses a verification code that is sent to the user's email address or mobile device, which the user then enters during sign-in to confirm their identity.

## Step-by-step instructions

- [Verifying your device](#)

# RB Connect Mobile functions

All functions are accessible by clicking  in the upper left corner of your mobile device's window.

- **[Jobs](#)**

Request depositions and other jobs, manage current jobs, and upload files.

- **[Order Transcript](#)**

Request transcripts on jobs you were already billed for.

- **[Account Activity](#)**

View and pay invoices.

- **[Transcript Packages](#)**

Work on transcripts online.

- **[Repository](#)**

Download files.

- **[Support Tickets](#)**

Get help and maintain a paper trail of the process.

- **[Personal](#)**

Update your contact information, view information and announcements, change your password and/or preferences.

## Reference

- [Function layout](#)















# Function layout

Functions are laid out in [pages](#), which can be further divided into [panes](#).

## • Pages

When you select a function by clicking its name in the menu, it replaces the menu or other function on your device's screen.

Basic function options appear at the top of the page, such as:

-  Main menu
-  Search in function
-  Clear search results
-  Back to previous page
-  Edit page contents
-  Send/save
-  Sub-functions
-  Download file
-  Pay via credit card
-  Add a request
-  Cancel order
-  Close page

## • Panes

Some functions organize related information into subgroups called panes that are designated by a header bar that contains the subgroup's label.

## Reference

- [Functions](#)

### **Step-by-step instructions**

- [Searching in RB Connect Mobile](#)
- [Filling in RB Connect Mobile forms](#)


# Searching in RB Connect Mobile



You search your online database through the first page of a function.

## 1. Set search parameters

Start a search by clicking in any editable field in a search form. (Editable fields are denoted by an outline around the labeled field). To fill out a field, see [Filling in RB Connect Mobile forms](#).

## 2. Get results

Click . Any information in the database that meets your search criteria is displayed in a grid, divided into horizontal rows and vertical columns. The first row is always the heading row. It contains labels that explain the contents of the columns.

- Click  to clear the search results and return to the search fields.
- Click  to the right of your desired result to access its details and related options.

### **NOTE: Required fields**



Form fields and options that include \* in their labels require an entry/selection before you can search/save your work.

### **Step-by-step instructions**

- [Filling in RB Connect Mobile forms](#)

## Filling in RB Connect Mobile forms

Depending on the information sought, interactive form fields require different input methods.

1. Click in an editable field. (Editable fields are denoted by an outline around the labeled field).
2. Then:
  - Use the onscreen keyboard/keypad to enter text or numerals in the field. If entering text in a search field, you must enter at least 3 consecutive characters of a word in the field. To find all listings, type %%%.
  - If you have the option, you can click **AutoFill** at the top of a keyboard to fill in certain information stored on your mobile device, such as your name and email address.
  - If you have the option, you can click  at the top of a keyboard to move forward from field to field in a form. Or  to move backward between text fields in a form.
  - If the field shows a spinner/picker/list view, scroll to your preferred option.
  - If the field is a date field, the spinner will include 3 separate scrolling options for you to select the month/day/year.
3. Click **Done** or **Set** at the top of the keyboard/keypad/spinner.

### **NOTE: Required fields**


Form fields and options that include \* in their labels require an entry/selection before you can search/save your work.


### **Step-by-step instructions**

- [Searching in RB Connect Mobile](#)

## Searching your calendar

Find jobs using various search criteria.

1. Continue from [Viewing your calendar](#).
2. On the Jobs screen, if your default view style is List in [Preferences](#), the **Search By** page will automatically appear. If **Search By** fields are not already visible, click .
3. In the **Search By** pane, no particular filter is required. Narrow your search results by entering text and making selections:
  - **Contact**  
Default is ALL. To find jobs for a specific person, click in the field. Then scroll to a name and click **Set** to select it.
  - **View Style**  
Default is set in Preferences (see [Setting preferences](#)). To change current view style without changing the default, click in the field. Then scroll to the other option and click **Set** to select it.
    - **Calendar** – Displays a month’s worth of jobs at once in a calendar-page format.
    - **List** – Displays your calendar in a results grid. List view shows the most information about jobs in the results, plus it has the most search criteria so you can narrow results further.
  - **Job Date From/Job Date To**  
*List View only*  
Default is from today to 10 days in the future. To change date range, click in each field, then scroll to a month, day, and year. Click **Set** to select the date.
  - **Job No.**  
*List View only*  
Click in the field, then use the keypad to enter the entire job number, and click **Set**.
  - **Case**

Click in the field, then use the keyboard to enter part of a case's name. Click  to move to the next field or click **Done**.

- **Witness**

Click in the field, then use the keyboard to enter part of a deponent's name, and click **Done**.

4. Click . Only jobs that fit the search criteria appear on the Jobs page.

## Reference



- [Job](#)
- [Preferences](#)

## Step-by-step instructions

- [Setting preferences](#)
- [Viewing job details](#)
- [Rescheduling jobs](#)
- [Changing job requests](#)
- [Canceling jobs](#)
- [Requesting jobs](#)

## Viewing job details

View details of existing jobs, update job requests, reschedule or cancel jobs, and request new jobs.

1. Continue from [Viewing your calendar](#).
2. On the View Job page, no information is editable:
  - The first pane, **General**, includes the most important job information, such as the job number we have assigned to the job and the current status of the job. See [Entering general job information](#) for other field descriptions.
  - The **Ordering Client** pane lists information about who is responsible for the job. See [Requesting jobs](#) for information about its editable fields.
  - The **Job Location** pane has the job location's address, phone, driving directions, and any notes about the location. See [Entering job locations](#) for field descriptions. To view the location on a map, click the hyperlinked text in the **Address** field. Then scroll to the desired map service and click **Set**.
  - The **Billing Information** pane contains details for 3rd party billing. See [Entering billing information](#) for field descriptions.
  - If there is a **Custom** pane, this includes special information about the job.
  - The **Files** pane lists any files related to the job that are stored in the online repository. To download a file to your browser, click it, then on the View File page, click .
3. When viewing a job, click  for options. Depending on the job's status, you will be able to:
  - **Add the job to your calendar app.** In the options drop-down, click **Add to Calendar** – [your calendar app: iCal, Google, Outlook or Yahoo]. The job will appear in your calendar app. Follow your calendar app's instruction for saving the job in the app.
  - **Copy it to create a new job.** Instead of starting jobs from scratch each time, copy job information into a new job, then update it. In the options drop-down, click **Copy &**

**New.** All of the job information copies to a new **Request New Job** page except the job date and times. See [Requesting jobs](#) for information on filling these fields and submitting your request.

- **Reschedule the job.** If the job date has changed, see [Rescheduling jobs](#).
- **Update the job information.** If other aspects of the job have changed, you can either edit the job (if its **Status** is “Request New”) or submit your changes for our staff to update it. See [Changing job requests](#).
- **Request job confirmation.** If you want to check that your job request was received by our office, click **Request Confirm** in the options drop-down. The job’s **Status** changes to “Request Confirm,” and our office receives your request.
- **Cancel the job.** See [Canceling jobs](#).

## Reference

- [Job](#)
- [Preferences](#)

## Step-by-step instructions


- [Setting preferences](#)
- [Searching your calendar](#)
- [Entering general job information](#)
- [Entering job locations](#)
- [Entering billing information](#)
- [Requesting jobs](#)
- [Rescheduling jobs](#)
- [Changing job requests](#)
- [Canceling jobs](#)



## Creating recurring jobs

If you have a series of regularly scheduled jobs, save time by scheduling the jobs in advance with **Set Multiple Job Dates**. Select every day or specific days of the week within a time frame, and RB Connect Mobile automatically sets up the jobs. If the jobs are not identical, you can change them after setting them up.

### 1. Start new job

1. To make multiple job requests at once, click **Jobs**.
2. In the Jobs screen, click .

### 2. Enter job dates

1. In the Request New Job screen, click  > **Set Multiple Dates**.
2. In the **Set Multiple Dates** screen, select how you want to schedule the jobs in **Type**:



#### ■ Scheduler

Default wizard adds dates within a range automatically.


1. **Occurs**: Select Daily to create jobs for every day including Saturday and Sunday. Select Weekly to select the days of the week.
2. **Weekdays** (if Occurs Weekly selected): Select the days of the week.
3. **Duration**: Enter the **\*Start Date** and **\*End Date** (both required).

#### ■ Fixed Dates

Add dates one at a time.

1. In the **Job Dates** pane, click in the field, then scroll to the desired month, day, and year. Click **Set** to select the date.
2. Click  and select another date. If you want to remove one of the dates you selected, click  next to the date.

3. Repeat until you have entered all the dates.

3. Click . The specified parameters appear in the **Job Date** field of the **General** pane in Request New Job.

### 3. Enter job information

1. Finish adding required job information:


- **\*Start Time/\*End Time**

*Required.* Click in each field, then scroll to the desired hour, minute, and AM/PM. Click **Set** to select the time. If times will vary, you can update individual requests after saving.

- **\*Time Zone**

*Required.* Click in the field, then scroll to the desired time zone and click **Set**.

2. To enter other job information, see [Requesting jobs](#).

3. Click . Identical job requests are created for the specified dates. If any of the jobs varies, such as having a different start time, you can update the request's information as long as its **Job Status** in the Jobs window is "Request New." If the job has any other status than "Request New," you must [submit a change job request](#).

#### Reference

- [Job](#)

#### Step-by-step instructions

- [Requesting jobs](#)
- [Changing job requests](#)

## Entering general job information

You must enter required job information (*designated by \**) before saving a job request. You can enter other information, such as witness names, now or later, or leave them blank.

1. Continue from [Requesting jobs](#).
2. In the **General** pane on the Request New Job page, enter information/make selections:

- **\*Job Date**

*Required.*

- **If this is a single job**, click in the field, then scroll to the desired month, day, and year. Click **Set** to select the date the job will take place.

- **If this is a job with multiple dates**, see [Creating recurring jobs](#).

- **\*Start Time/\*End Time**

*Required.* To set the job's time range, click in each field and scroll to the desired hour, minute, and AM/PM. Click **Set** to select the time.

- **\*Time Zone**

*Required.* Change if the job will take place in a different time zone than your default. Click in the field, then scroll to the desired time zone and click **Set**. Your default time zone is set in [Preferences](#).

- **Adjust clock for daylight saving changes**

Check this box so that request communications will have the correct time.

- **Expert Type**

If you have this option and it's applicable to the job, click in the field and scroll to the witness's expertise, then click **Set**.

- **Job Type**

If you have this option and the job type is different than the default, click in the field and scroll to the the category of job being requested, then click **Set**.

- **Witness**

If you have this option, you can click in the field and enter the deponent's name, then click **Done**. If you have more than one witness being deposed, you can either enter all of their names in one job, separated by commas, or create multiple jobs, one for each witness.

- **Subpoenaed Witness**

If you have this option, you can check the box if deponent has been summoned to appear.

- **Case**

If you have this option and it's applicable to the job, enter the case name.

- **Case No.**

If you have this option and it's applicable to the job, enter the case number.

- **Specialties**


If you have this option and the job requires specific expertise or knowledge, click in the field, then scroll and click any required specialties to select them. When finished, click **Set**.

- **Notes**

Enter any additional job request information not included elsewhere on the form.

**NOTE: Custom pane for additional information**

To minimize the amount of information you enter in **Notes**, there might be an additional pane on the Request New Job page with fields and options you can use instead to give us more information about the job request.

3. When finished with general information, [continue with your new job request](#). Or if you don't have other information, click  to submit your request.

## Reference

- [Job](#)
- [Preferences](#)




## Step-by-step instructions







- [Creating recurring jobs](#)
- [Setting preferences](#)
- [Viewing your calendar](#)

## Requesting additional services on a job

If you require more than a court reporter for a job, such as a conference room, and the **Request Services** field appears on the Request New Job page, you can quickly include a request for specific services when you send in a job request.

If you do not have this option, check to see if there is a **Custom** pane with fields for making service requests. Or enter your request in the **Notes** field in the **General** pane.

1. Continue from [Requesting jobs](#).
2. In the Request New Job's **Ordering Client** pane, click  next to the **Request Services** field.
3. On the Request Services page, click .
4. On the New Service page, set:
  - **\*Service**  
*Required.* Click in the field, then scroll to the desired service and click **Set**. (If the service you require is not listed, you can add your request in the **Notes** field of the **General** pane; or if there is a **Custom** pane, check there to see if it has an option for adding the service.)
  - **\*Units**  
*Required.* If you require a different amount than the default, click in the field, then enter the amount needed and click **Set**.
  - **Delivery Method**  
If applicable, click in the field, then scroll to the desired service delivery method and click **Set**.
  - **Turnaround Type**  
If applicable, click in the field, then scroll to the desired turnaround time frame and click **Set**.
5. Click .

6. On the Requested Services page, the service appears with  next to it on the left and  on the right. To:
- **Update the service** – Click , then on the Edit Service page, change the entries as desired and click .
  - **Remove the service** – Click , then click **Yes** in the popup.
  - **Add another service** – Click , and repeat the above steps.

## Reference

- [Job](#)

## Step-by-step instructions

- [Requesting jobs](#)

## Entering job locations

Depositions can take place in a court room, a law firm's office, your own conference room, or another location. You can enter locations in job requests, if desired.

1. Continue from [Requesting jobs](#).
2. In the **Job Location** pane on the Request New Job page, no information is required, but you can enter any information you have about the job location:

- **Same Location as Ordering Firm**

Check this box to select the ordering firm's office (listed in **Ordering Client** pane) as the location. If you check this box, the other location fields will not appear.

- **Location**

If job is not at the ordering firm's office, enter the location's name or other identifier.

- **Address**

If job is not at the ordering firm's office, enter the street address.

- **City**

Default is set in [Preferences](#). If job location is in a different city, enter the the city name.

- **State**

Default is set in [Preferences](#). If job location is in a different state, click in the field, then scroll to the state name in the spinner and click **Set**.

- **Zip**


Enter the job location's zip code in this field.

- **Phone**

Enter the job location's phone number.

- **Directions**

Enter any helpful instructions for finding the location.

3. When finished with location information, [continue with your new job request](#). Or if you don't have other information, click  to submit your request.

## Reference

- [Job](#)
- [Preferences](#)


## Step-by-step instructions

- [Setting preferences](#)
- [Viewing your calendar](#)



## Entering billing information

You can include information about who to invoice for a job when submitting the job request.

1. Continue from [Requesting jobs](#).
2. In the **Billing Information** pane on the Request New Job page, enter information/make selections:
  - **Bill To Contact is the same as Ordering Contact** – Check this box if the person designated as the Ordering Contact for this job is also responsible for paying the job's invoice.
  - **Direct Billing Notes** – If this field appears, use it if your firm is not the billing party. Any text entered here appears on the invoice along with Claim No., Name of Insured, and Date of Loss.
  - **Client Matter No.** – If you have this option, you can enter the number, which consists of a number designating the client combined with a number designating the case, which will be printed on the invoice. This number is required for electronic billing.
  - **Claim No.** – If you have this option and this job is part of an insurance case, you can enter the insurance claim number.
  - **Name of Insured** – If you have this option and this job is part of an insurance case, you can enter the insured individual's name.
  - **Date of Loss** – If you have this option and this job is part of an insurance case, you can enter the date of incident.
3. When finished with billing information, [continue with your new job request](#). Or if you don't have other information, click  to submit your request.

### Reference



- [Job](#)

### Step-by-step instructions

- [Viewing your calendar](#)

## Rescheduling jobs

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

1. To find the job you want to reschedule, see [Viewing your calendar](#).
2. On the View Job page for the job you want to reschedule, click  > **Reschedule**.
3. On the Reschedule Job page, all fields are required:
  - **\*New Job Date**  
*Required.* Click in the field, then scroll to the desired month, day, and year. Click **Set** to select the date the job will take place.
  - **\*Start Time/\*End Time**  
*Required.* Default times are the times for the original job. If you need to change the job's time range, click in each field and scroll to the desired hour, minute, and AM/PM. Click **Set** to select the time.
  - **\*Reason**  
*Required.* Click in the field and enter the reason you are changing the job date, then click **Done**.
4. Click . The original job's **Status** changes to "Request Cancel," and a new job is added to your calendar with the status of "Request New."

### Reference


- [Job](#)

### Step-by-step instructions

- [Viewing your calendar](#)


## Changing job requests

You can make any necessary changes to future jobs in your calendar, except the job date. To change the job date, you must [reschedule the job](#). If a job is past our cut-off date for changes and you need to revise it, please contact our office.

1. To find the job you want to reschedule, see [Viewing your calendar](#).
2. On the View Job page for the job you want to reschedule, click  > **Request Change Job Info**.

**NOTE: You can edit jobs yourself if they have a Request New status**

If you need to update a job you recently entered, you will be able to do it yourself if its **Status** on the Jobs page is "Request New." If you click a newly requested job in the calendar, it will open as an Edit Job page, where you can edit everything except the job date. See [Requesting jobs](#).

3. All of the job information copies to a **Request Change Job Info** page. See [Requesting jobs](#) for information on filling these fields and submitting your request.
4. Click . Our office will receive an alert notifying us of your request. When we update the job, you will receive an email confirmation.

### Reference



- [Job](#)

### Step-by-step instructions

- [Rescheduling jobs](#)
- [Viewing your calendar](#)
- [Requesting jobs](#)

## Canceling jobs

If a job is cancelled, instead of calling us, you can quickly send us a cancel request.

1. To find the job you want to cancel, see [Viewing your calendar](#).
2. On the View Job page for the job you want to reschedule, click  > **Request Cancel**.
3. On the Request Cancel Job page, click in the field and enter your reason for canceling the job (*required*). Then click  to send your cancellation to our office.

### Reference

- [Job](#)

### Step-by-step instructions

- [Viewing your calendar](#)

# ASCII

American Standard Code for Information Interchange, or **ASCII**, is a common format for text files. In an ASCII file, every alphabetic, numeric, or special character is represented by a 7-digit combination of 0s and 1s.

## Viewing invoice details

View an invoice's details, download a PDF of the invoice, and pay the invoice.

1. To find an invoice, see [Viewing account activity](#).
2. Click > next to an invoice number.
3. On the View Invoice page, no fields are editable. You can view details, download its PDF version, and pay the invoice. Scroll to:
  - **Job**  
To see the invoice's related job number & date, status, case name & number, and ordering firm/contact.
  - **Invoice**  
To see the invoice's number, date, amount, current balance, late charges, finance charges, paid date, sold to firm/contact, bill to firm/contact, name of insured, insurance claim number, client matter number, date of loss, reference number, and transcript information (witness name and page amount).
  - **Payment History**  
To see any payments already credited to the invoice.
  - **Repository**  
To download the invoice PDF. Click > next to the file name.
4. To pay the invoice, see [Paying invoices online](#).


### Step-by-step instructions

- [Viewing account activity](#)
- [Paying invoices online](#)

## Paying invoices via mobile

Pay invoices (including COD invoices) on your smartphone or other mobile device using credit cards. Our e-commerce is fully integrated with [PayPal](#) for security and convenience.

Continued from [Viewing invoice details](#).

1. On the View Invoice page, click  > **Pay Invoice**.
2. In the Pay Invoice page's **Credit Card Information** pane, enter your credit card information:
  - **\*Card Type**  
*Required.* Click in the field, then scroll to your credit card's category and click **Set** to select it.
  - **\*Card Number**  
*Required.* Click in the field. Enter the number issued to your credit card using the keypad. Then click **Set**.
  - **\*Expiration Month**  
*Required.* Click in the field, then select the 2-digit month your card will expire. Click **Set** to select it.
  - **\*Expiration Year**  
*Required.* Click in the field, then select the 4-digit your card will expire. Click **Set** to select it.
  - **\*CVV**  
*Required.* Click in the field. Enter your credit card's 3- or 4-digit Card Verification Value code using the keypad. Then click **Set**.
3. In the **Billing Information** pane, check **Same as my profile** to have the fields filled with the information from your **My Profile** page (see [Updating your contact information](#)).
4. Edit the **Billing Information** fields, if necessary, to match your personal information on your credit card account by clicking in a field:

- **\*First Name**

*Required.* Enter your given name using the keyboard. Click **Done** to exit the keyboard.

- **\*Last Name**

*Required.* Enter your family name using the keyboard. Click **Done** to exit the keyboard.

- **\*Email**

*Required.* Enter your email address using the keyboard. Click **Done** to exit the keyboard.

- **\*Address 1**

*Required.* Enter street address only of your credit card billing address using the keyboard. Click **Done** to exit the keyboard.

- **Address 2**

Second address line is optional.

- **\*City**

*Required.* Enter city of your credit card billing address using the keyboard. Click **Done** to exit the keyboard.


- **\*State**

*Required.* Scroll to abbreviation of the state of your credit card billing address. Then click **Set**.

- **\*Zip**

*Required.* Enter postal code of your credit card billing address using the keypad. Click **Done** to exit the keypad.

#### **NOTE: Auto-fill fields from your browser settings**

Instead of copying information from your profile, you can use personal information from your browser to automatically fill in the **Billing Information** fields, if you have set up your browser to auto-fill forms. Click in a blank field and click AutoFill Contact to populate the field with information saved in your browser. Click in other fields or use  to move back and forth between fields to auto-fill or manually enter more information.

5. Click .



# PayPal

**PayPal** is an online system for money transfers that eliminates the need for mailing paper invoices and checks. It handles credit card payments and other forms of electronic payment for online vendors.

## Step-by-step instructions



- [Paying invoices](#)

## Finding transcript packages

If you cannot easily locate a transcript by searching Transcript Packages with your name, use other search filters to narrow the results.

Continued from [Viewing transcripts on your device](#).

1. To search transcript packages:

- On any page, click . Then click **Transcript Packages** on the menu page.
- On a Transcript Packages page, click  to return to the **Search By** pane.

2. In Transcript Packages' **Search By** pane, no specific filter is required, but you must use at least one:


- **Contact**

Default is ALL. To find transcript packages for yourself or another person at your firm, click in the field. Then scroll to a name and click **Set** to select it.

- **Job No.**

To see transcript package(s) for a specific job, click in the field. Enter the job number using the keypad. Then click **Set**.

- **Witness**

To see transcript package(s) for a specific witness, click in the field, then enter part of a deponent's name using the keyboard. Click  to move to the next field or click **Done** to exit the keyboard.

- **Case Name**

To see transcript package(s) for a specific case, click in the field, then enter part of the case name using the keyboard. Click  to move to the next field or click **Done** to exit the keyboard.

- **Job Date From/Job Date To**

To see transcript package(s) for jobs within a specific date range, click in each field,

then scroll to a month, day, and year. Click **Set** to select the date.

- **Word Search Type**

To find transcript packages that contain specific words, click in the field. Then scroll to a filter and click **Set** to select it.



- **All of the words** – Default. To find transcript packages that contain instances of all the words you entered.

- **Any of the words** – To find transcript packages that contain instances of one or more of the words you entered.

- **The exact phrase** – To find your selection as you typed it.

- **Words to search for**




Click in the field, then enter text you want to find using the keyboard. Click **Done** to exit the keyboard.

3. Click . All of your transcript packages appear in a list. If you want to refine your search, click  to return to the **Search By** pane.

## Searching within 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.

Continued from [Viewing transcripts on your device](#).

1. In the View Transcript Package window, click  > **Search**.
2. Enter your search word(s) in the popup field and click **Search**.
3. **Page Mode** changes to **Word Mode**, the transcript jumps to the first instance of the text, highlights it, and displays in the Transcript Package footer the number of instances the text appears in the transcript along with which instance is currently highlighted. (The number range that appears below these numbers in parenthesis is the current page and total number of pages.) Use  and  to page through other instances of the searched text.


### **NOTE: Search is not case sensitive**

You can enter a word/phrase/fragment with any combination of upper and lower case letters, and Search will find all instances that match your content, regardless of capitalization.

## Highlighting transcripts


You can highlight important information in transcripts, then export a file of only your highlighted lines to your browser. You can further differentiate your highlighted comments by setting up multiple highlight colors to visually group content into categories in the transcript package, then export highlights by color to view their content offline.

Continued from [Viewing transcripts on your device](#).



1. To highlight a line of text in the View Transcript Package window, click the  at the end of the line.
2. In the Highlight popup, click the color you want to mark the line with.

### **TIP: Set up your own highlight colors**

You can set up multiple highlight colors in Transcript Packages to help you differentiate content. If you want to use different colors than listed in the Highlight popup, click **Add/Remove Color**. See [Adding & removing highlight colors](#).

3. The line's background changes to the color selected. To remove highlighting, click the highlighted line's . Then in the Highlight popup, click:
  - **Remove Highlight** – To remove the highlight.
  - **A different color** – To change the text background.
4. To find highlighted text, click in the **Mode** field in the Transcript Package footer, then scroll to **Highlight Mode** and click it.
5. In the popup that appears, ALL is the default. To only search highlighted text of a particular color, click its radio button. Click **OK**.
6. The View Transcript Package window displays:
  - First page of the transcript that has highlighted text.
  - Red outline of the first line of highlighted text.
  - Number of highlighted lines in the transcript above the current page and total number

of pages in the transcript (in parentheses) in the Transcript Package footer.


7. Use  and  to jump to other instances of highlighted text.
8. To export a file of your highlights, see [Exporting transcripts](#).

### **Step-by-step instructions**



- [Adding & removing highlight colors](#)
- [Exporting transcripts](#)

## Adding & removing highlight colors

If you want to use different colors for highlighting lines in your transcripts than the colors listed in the Highlight popup, or you no longer want a particular color option, you can manage your color highlights in Transcript Packages.


1. To add or remove a color option for highlighting Transcript Packages, click the  at the end of a line. It does not have to be a line you want to highlight.
2. In the Highlight popup, click **Add/Remove Color**.
3. In the **Highlighting Colors** panel, if you want to:

### • Add a color

1. Click . In the **New Highlighting Color** panel, click the **\*Color** field.
2. Swipe through the color dots, then click to choose one. You can lighten or darken the color by sliding the control at the bottom. The selected dot changes color as you slide.
3. When you have the color you want, click **Set**.
4. Enter identifying text for the highlight in **\*Label**, then click **Done**.
5. Click  to save the color.

### • Remove a color

You cannot remove the default highlight color, but you can remove any colors you have added.

1. Check the color's radio button, then click .
2. In the popup that appears, click **Yes**. Removing a highlight color from the **Highlighting Colors** panel does not remove the previously applied color from any transcripts, but the color will no longer appear as a selection to use for future highlights.

## Step-by-step instructions





- [Highlighting transcripts](#)

## Making & viewing notes



You can make notes on transcripts, search for notes in transcripts, edit or delete notes, and export notes to work with offline.

Continued from [Viewing transcripts on your device](#).

### 1. Make notes

1. To add a note to a line of text in the View Transcript Package window, click the  at the end of the line.
2. Click in the field on the New Note page.
3. Enter your notes using the keyboard.
4. Click **Done** to exit the keyboard.
5. Then click  to save the note.  changes to .



### 2. Find notes

1. To find notes, click in the **Mode** field in the Transcript Package footer, then scroll to **Notes Mode** and click it.
2. The View Transcript Package window displays:
  - First page of the transcript that has a linked note.
  - Red outline of the first line of text with a linked note.
  - Number of notes in the transcript above the current page and total number of pages in the transcript (in parentheses) in the Transcript Package footer.
3. Use  and  to jump to other notes.

### 3. View, edit, delete notes

1. Click  to view, edit, or delete your note.



2. On the **View Note** page, if you make any changes or delete the information, click . Otherwise, click  to return to the transcript.

4. To export notes, see [Exporting transcripts](#).

**NOTE: You can make notes on exhibits too**

Similarly to making notes on the transcript, you can also add notes to attached files. See [Working with attached files](#). These notes are not searchable, but when you export notes, they will be included in the export file.







**Step-by-step instructions**

- [Exporting transcripts](#)
- [Working with attached files](#)

## Working with attached files

You can add notes to attached files, and export the files to your browser to view, save, print, etc.

Continued from [Viewing transcripts on your device](#).

1. To see a transcript's attached exhibits, videos or other files, click  > **Files** in the View Transcript Package window.
2. Any attachments will be listed in designated panes on the Files page. To:
  - **View a file** – Click the file, then click  on the View File page to open the file in a new browser window. Depending on your mobile browser, you can then also save the file, print it, create a PDF, etc.
  - **Add notes** – Click  next to the file name on the Files page, then click in the field on the New Note page. Enter your notes using the keyboard. Click **Done** to exit the keyboard. Then click  to save the note.
  - **Read/edit notes** – Click  next to the file name on the Files page to see the note. To edit the note, click in the field on the View Note page. Enter your notes using the keypad. Click **Done** to exit the keypad. Then click  to save the note.
3. To export your notes, see [Exporting transcripts](#).







### Step-by-step instructions

- [Exporting transcripts](#)

## Exporting transcripts

You can export transcripts and other information from Transcript Packages in several formats. You can also export files of your highlighted transcript lines and notes.

Continued from [Viewing transcripts on your device](#).

1. To export different versions of the transcript, including [AMICUS](#), condensed, and word list to your desktop, click  > **Export**.
2. On the **Export** page, click the radio button for the type of file you want to export:
  - **AMICUS**  
Default. Specific ASCII file format.
  - **Full-page Transcript**  
To create an [RB-PDF Transcript](#), click . To change any settings in the **Export – Full-page Transcript** panel, see [Customizing output preferences](#).
  - **Condensed Transcript**  
To create a [reduced size RB-PDF Transcript](#), click . To change any settings in the **Export – Condensed Transcript** panel, see [Customizing output preferences](#).
  - **Word Index**  
To create a [list of words](#) appearing in the transcript with page references, click . To change any settings in the **Export – Word Index** panel, see [Customizing output preferences](#).
  - **Word List**  
To create a [list of words](#) appearing in the transcript with the number of times each word appears, click . To change any settings in the **Export – Word List** panel, see [Customizing output preferences](#).
  - **Highlights**  
To export a file of highlighted text in the transcript, click . In the **Export – Highlights**

panel, ALL is selected by default. To only include one category of highlighted text, click its radio button. (See [Highlighting transcripts.](#)) The exported file lists the highlighted text and includes the page, line, and highlight label for each line listed.

- **Notes**

File of notes made on the transcript and attached files. (See [Making & viewing notes.](#))

3. Click  to open the file in your browser where you can print or save the file.

## Reference

- [AMICUS](#)
- [RB-PDF Transcript](#)
- [Condensed Transcript](#)
- [Word Index](#)
- [Word List](#)

## Step-by-step instructions

- [Customizing output preferences](#)
- [Highlighting transcripts](#)
- [Making & viewing notes](#)

## Customizing output preferences

Customize the appearance of a PDF full-size transcript condensed transcript, word list, or word index.

Continued from [Exporting transcripts](#).

On the **Export – [Format]** page, update defaults and make selections:

- **Margin Top/Margin Bottom/Margin Left/Margin Right**

Space from edge of paper to contents. Each margin can be a different amount. Update the measurements in inches.

- **Border Top/Border Bottom/Border Left/Border Right**

Optional outlines around page contents. Each side can get a different treatment. Select one in each drop-down:

- **Single** – Default. One-line border.

- **None** – No border.

- **Double** – Two-lines border.

- **Border Thickness**

Select a line width (stated in point percentage) from the drop-down.

- **Timestamp Location**

*Full-size & Condensed Transcript only*

Select where timestamps appear on each page of the transcript.

- **Show divide line for numbers**

*Full-size & Condensed Transcript only*

Check this box if you want to separate line numbers from the transcript contents with a vertical rule line.

- **Make line number outside the box**

*Full-page Transcript only*

Check this box if you want to place line numbers outside borders. (Choosing this option sets

all borders to single width.)

- **Font Name**

Select a typeface in the drop-down.

- **Font Bold**

*Full-page Transcript only*

Check this box if you want to use the boldface version of the font selected in **Font Name**.

- **Q&A Bolding**

*Full-size & Condensed Transcript only*

- **Questions Only** – Default. Questions in their entirety will be displayed in boldface.
- **None** – No questions or answers will appear in boldface.
- **Letter Q Only** – Initial letter Q will appear in boldface, but question contents will not.
- **Answers Only** – Answers in their entirety will be displayed in boldface.
- **Letter A Only** – Initial letter A will appear in boldface, but answer contents will not.
- **Questions and Answers** – Everything in Q&A format will appear in boldface.
- **Letter Q and A** – Both initial letters Q and A will appear in boldface, but question and answer contents will not.

- **Q&A Color**

*Full-size & Condensed Transcript only*

Default is black. If you want to use color to make question and answer segments stand out, change the color from the default:

1. Click the color field. Then in the popup color picker, swipe to find and click the basic hue you want.
2. Slide the button on the scale at the bottom to make the color lighter or darker.
3. When finished, click **Set**.

- **Layout**

*Condensed Transcript only*

- **2 columns x 2 rows (4 per page)** – Default.

- **2 columns x 1 rows (2 per page)** – Print 2 ASCII pages to a single page in landscape mode only.

- **Page Order**

*Condensed Transcript only*

- **Vertical** – Default. The reduced-size pages will appear on the page reading from top down, then left to right. (2 columns x 2 rows layout only)
- **Horizontal** – The reduced-size pages will appear on the page reading from left to right, then top down.

- **Page Number Position**

*Condensed Transcript only*

- **Top Right** – Default. In the margin above the reduced-size transcripts pages.
- **Bottom Right** – In the margin below the reduced-size transcripts pages.

- **Font Scale Mode**

*Condensed Transcript only*

- **Single Page** – Default. Font size might change from page to page but will use maximum (largest) font size for condensed print.
- **Whole Page** – Font size will be consistent throughout the document.

- **Do not condense first X pages**

*Condensed Transcript only*

Keep some pages at the start of the transcript at 100% by entering the number here.

- **Do not condense last X pages**

*Condensed Transcript only*

Keep some pages at the end of the transcript at 100% by entering the number here.

- **PDF Format**

*Full-size & Condensed Transcript only*

Default is PDF. If you want to create an archival PDF, select a PDF/A format in the drop-down. See [PDF/A](#).

- **Font Size**

*Word Index & Word List only*

Select a type size in points in the drop-down.

- **Columns**

*Word Index & Word List only*

Select the number of columns you want the word index/word list broken down into from the drop-down.

- **Show Word Count**

*Word List only*

Check this box to include the number of times each word in the list appear in the transcript.

## **Reference**

- [RB-PDF Transcripts](#)
- [Condensed transcripts](#)
- [Word Index](#)
- [Word List](#)

## **Step-by-step instructions**

- [Exporting transcripts](#)



# Amicus

**Amicus** is an [ASCII](#) file format that follows its own set of rules, such as starting each page with its page number. Amicus does not maintain the original look of the transcript, but does maintain page and line numbers. (ASCII files in Amicus format are preferred by [Summation](#) users.)

## Reference

- [RB-PDF Transcripts](#)
- [ASCII](#)

## Step-by-step instructions

- [Exporting transcripts](#)

# Condensed Transcript

Condensed transcripts are exact replicas of full-sized transcripts but reduced in size so that 2 or 4 transcript pages fit on one sheet of paper.

## Reference

- [RB-PDF Transcripts](#)

## Step-by-step instructions

- [Exporting transcripts](#)

## RB-PDF Transcripts

**RB-PDF Transcripts** are PDF versions of [ASCII](#) transcripts. As PDFs, they retain the appearance of the original document and can be easily shared with others because PDF is a universal format. They are customizable, and can include [condensed transcripts](#), [word lists](#), [word indexes](#), and [linked exhibits](#).

### Reference

- [ASCII](#)
- [Condensed Transcript](#)
- [Word List](#)
- [Word Index](#)
- [Linked exhibits](#)

### Step-by-step instructions

- [Exporting transcripts](#)

# PDF

Portable Document Format (PDF) is the most popular file format for saving documents to preserve how they look (text formatting and images) no matter what format they were originally saved as or what system they are viewed on.

## Reference

- [RB-PDF Transcript](#)
- [PDF/A](#)

## Step-by-step instructions

- [Exporting transcripts](#)

# PDF/A

**PDF/A** file formats are specialized versions of [PDF](#) designed for archiving/preserving electronic documents. PDF/A formats differ from PDF by prohibiting features unsuitable for long-term archiving.

## Reference

- [RB-PDF Transcript](#)
- [PDF](#)

## Step-by-step instructions

- [Exporting transcripts](#)

# Word Index

A **word index** lists the words appearing in a transcript, along with the pages and lines they appear on.

## Reference

- [RB-PDF Transcripts](#)

## Step-by-step instructions

- [Exporting transcripts](#)

## Word List

A **word list** shows the words appearing in a transcript; it can also include the number of times they appear in parentheses (word count). Each word on the list appears in the same way as it first appears in the document.

### Reference

- [RB-PDF Transcripts](#)

### Step-by-step instructions

- [Exporting transcripts](#)



## Linked exhibits

Instead of a transcript with its related exhibits as separate files, a transcript package can include hyperlinked exhibits embedded inside the transcript, so you can view exhibits in context by clicking the links in the transcript.



## Updating your contact information

You can update your profile at any time.

1. In RB Connect, click .
2. On the menu page, click **Personal > My Profile**.
3. On the My Profile page, click .
4. On the Edit My Profile page, **Firm Info** fields are uneditable. If any of this information is incorrect, contact our office. In the **My Info** pane, update your personal contact information as needed by clicking in a field and using the keypad or spinner, then clicking **Done** or **Set**:

- **\*First Name**

*Required.* Your given name.

- **Mi.**

Your middle name or initial.

- **\*Last Name**

*Required.* Your family name.

- **Salutation**

Your title, i.e., how you want to be addressed.

- **\*Full Name**

*Required.* How you want your name to appear in our database.

- **\*Email**

*Required.* Your business email address. If you have the option and want to sign in using social media, you must enter the same email address here as your social media account, i.e., Facebook, Google+ or LinkedIn. (See [Logging in.](#))

- **\*Main Phone**

*Required.* Your firm's phone number.

- **Direct Phone**

Your phone number at the firm.

- **Mobile Phone**

Your cell phone number.

- **Mobile Vendor**

Your cell phone service provider.

- **Fax**

If you have a facsimile machine, enter your fax number.

5. Click .



### **Step-by-step instructions**

- [Filling in RB Connect Mobile forms](#)



## Updating your password

You can change your password at any time. We recommend using [strong passwords](#) for better security.

### 1. Enter your current password

1. To update your password, click .
2. On the menu page, click **Change Password**.
3. On the Change Password page, click in **\*Current Password** (*required*) field.
4. Enter your password using the keyboard or click an autofill option. Then click  to move to the next field or click **Done** and click in **\*New Password**(*required*).

### 2. Create a new password

1. If your device autofills a strong password in both **\*New Password** and **\*Confirm Password** (*required*), you can:
  - Use the auto-generated password as your new password.
  - Enter your own password in **\*New Password** (*required*). Then click  to move to the next field or click **Done** and click in **\*Confirm Password** (*required*). Enter the same new password, and click **Done**.
2. Click .

### NOTE: Best business practices for passwords

It is good business practice to change your assigned password to a [strong password](#) that only you know, and also to change it periodically. Once you change your password, no one else will know it nor can it be retrieved from the system.

### TIP: Forgotten/no password

If you don't have a password or forgot your password, you can set it from the log-in screen. See [Setting your password at log-in](#).

## Reference




- [Strong password](#)

## Step-by-step instructions

- [Setting your password at log-in](#)

## Setting preferences

Customize your job request defaults.

1. In RB Connect, click .
2. On the menu page, click **Personal > Preferences**.
3. On the Preferences page, click .
4. In the **Jobs** pane, click in **Default View Style** and scroll to your preferred job calendar view, then click **Set**:
  - **Calendar** – See your jobs a month at a time in a calendar grid format.
  - **List** – See a custom list of your jobs.
5. In the **New Job** pane, click in a field and:
  - **Default City**  
Use the keyboard to enter the name of the city where most of your jobs take place. Then click **Done**.
  - **Default State**  
Select the **Default City's** state, province, or territory in the spinner. Then click **Set**.
  - **Default Time Zone**  
Select your time zone in the spinner. Then click **Set**.
6. Check the **Adjust clock for daylight savings changes** box if you want the job clock to change with daylight savings time.
7. To save your revised preferences, click .

### Reference


- [Jobs](#)

### Step-by-step instructions

- [Filling in RB Connect Mobile forms](#)
- [Viewing your calendar](#)
- [Requesting jobs](#)

## Logging out

While you will be automatically logged out after 20 minutes of inactivity for security reasons, you can also log out manually at any time.

1. To log out, click , then click **Log Out** on the menu page.
2. In the popup that appears, click **Yes**.