RB Connect Mobile User Guide
for reporters and other resources

version 9.44

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

View your job calendar, accept jobs, view job details, and download files.

Reference

- Job

Step-by-step instructions

- Viewing your calendar

- Viewing job details

- Requesting assignments

Tasks In Progress

Tasks in Progress lists tasks you have not turned in yet, in chronological order from the oldest first to today.

To view your outstanding tasks, click **Tasks in Progress.** Assigned tasks that you have not turned in yet are listed by job number and include basic information in the listing. Tasks in Progress is a read-only function.

NOTE: Some tasks may not appear in your Tasks in Progress

If you are responsible for certain tasks that do not result in a product to turn in afterwards, e.g., a conference room for a depo, those tasks will not appear in your Tasks in Progress list.

Reference

- Task

Account Activity

See at a glance which invoices will be included in your next paycheck and what other invoices are outstanding. Review the details of any invoice.

Step-by-step instructions

- Viewing account activity

Pay Statement

View your current and past payroll reports in a browser, then print or save them.

Step-by-step instructions

- [Viewing pay statements](#)

Repository

If you are assigned to a job on a case that other reporters have worked on before, you can download copies of their files on the case to your browser, such as the word list, dictionary and exhibits, from the repository.

Step-by-step instructions

- Using repositories
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- Viewing & downloading attached files

Availability

View your time off in a monthly chart. Make requests for time off. Then monitor the status of your requests.

Step-by-step instructions

- Viewing your schedule

- Requesting time off

Firms

Firms are the law offices and other businesses who request services from the agency you work for. Contacts are the people working at these firms, such as lawyers, paralegals, and legal secretaries.

Step-by-step instructions

- Looking up firms

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, or log out of the program.

- [My Profile](#)

- [Announcements](#)

- [Change Password](#)

- [Log Out](#)

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
- Viewing job details

Viewing your calendar

Find jobs using various search criteria. View details of existing jobs, download job files, and request assignments.

1. To see your 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 and include basic information like start time and task.

            *   **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](#).

Reference

- [Job](#)

- [Client Of](#)

- [Sales Rep](#)

- [Preferences](#)

Step-by-step instructions

- [Requesting assignments](#)

- [Viewing your sales commission calendar](#)

- [Setting preferences](#)

- [Viewing job details](#)

Viewing job details

Review individual assigned jobs in detail including their current status, appearance attorneys and their requested services. Add the job to your personal calendar. Get directions and job-related files. Contact resources who worked on the same case previously.

1. Continue from Viewing your calendar.

2. On the View Job page, no information is editable:

   - The first pane, **General,** includes the most essential job information, such as the job number we have assigned to the job and the current status of the job. See Viewing general job information.

   - The **Ordering Client** pane lists basic information about who is responsible for the job. See Viewing ordering party information.

   - The **Job Location** pane has information about where the job is scheduled to occur. See Viewing job locations. To view the job location on a map in a new window and get directions, click the hyperlinked text in the **Address** field. Then scroll to the desired map service and click **Set.**

   - The **Parties** pane lists any parties scheduled to attend, including the ordering client.

   - If you have the option, the **Previous Resources** pane shows which resources were previously assigned to the same case, along with basic job information and the resource's email address.

   - The **Repository** pane lists any files related to the job that are stored in the online repository. To view or download a file to your browser, click it, then on the View File page, click ⬇ and follow your browser's instructions.

   - If you have the option, the **Related Files** pane lists files uploaded to the repository for the case. To download a file to your browser, click it, then on the View File page, click ⬇ and follow your browser's instructions.

- The **Task** pane includes information about the [task](#) assigned to you, including any personal notes you entered. See [Viewing task information](#).

3. When viewing a job, click for options. Depending on the job's status, you will be able to:

- **Acknowledge the job.** In the options drop-down, click **Set Acknowledged Date.** Then click **Yes** in the popup to notify the office that you have seen the assignment and will take the job.

- **Enter estimated pages and estimated delivery date.** In the options drop-down, click **Set Estimated Pages & Delivery Date.** In **Estimated Pages,** enter your estimate for how many pages the transcript will be, then click **Set.** In **Estimated Delivery Date,** scroll to a month, day, and year. Click **Set** to select the date. Click to save your estimates.

- **Add your own notes.** In the options drop-down, click **Set Personal Notes.** On the Set Personal Notes page, click in the field and use the popup keyboard to enter your notes. Click **Done** when finished. Then click to save your notes. Notes entered here appear in the Task pane of the View Job page.

- **Add the job to your calendar app.** In the options drop-down, click **Add to Calendar –** [your calendar app:Google, Outlook.com, Calendar, or Yahoo]. The job will appear in your calendar app. Follow your calendar app's instruction for saving the job in the app.

- **Check in at the job location.** When you have reached the job location, click **Check In** in the options drop-down. The date will be recorded in the **Task** pane and will also by recorded on the agency side. Check In only works on the day of the job.

TIP: Acknowledge jobs with a single click

You do not have to log into RB Connect to acknowledge a job that you received via email if it includes the job worksheet embedded in the email. Instead, scroll to the bottom of the embedded worksheet and click the **To acknowledge please click** link. Acknowledging jobs this way means your acknowledgement is instantly recorded in our records.

Reference

[Job](#)

- [Task](#)

Step-by-step instructions

- [Viewing general job information](#)

- [Viewing ordering party information](#)

- [Viewing job locations](#)

- [Viewing task information](#)

Requesting assignments

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

1. To request assignment to your clients' jobs, click **Jobs.**

2. In the **Search By** pane, select Client Of in the **Type** drop-down. (To narrow results further, see Viewing your calendar.)

3. Click .

4. All of your clients' jobs that fit the search criteria appear in the monthly calendar/job list. If you are viewing by List View, jobs are grouped by ordering firm. To see a firm's jobs, click the hyperlinked firm name. The listing expands to show the related jobs.

5. To request a job, click its hyperlink.

6. In the Jobs > Job window, the information for the job you clicked appears.

7. Click **Request Assignment.**

8. In the pop-up that appears, click **Yes.** The office is notified of your request immediately.

9. In the next pop-up that appears, click **OK.**

Reference

- Job

- Client Of

Step-by-step instructions

- Viewing your calendar

- Viewing job details

Task

A **task** is a part of a job that requires a **separate** resource (person, company, thing) to accomplish, such as reporting, interpreting, video, or a conference room.

Reference

- Job

Step-by-step instructions

- Viewing job details

- Tasks in Progress

Viewing financial activity

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

1. To view invoices, click ▤.

2. On the menu page, click **Account Activity.**

3. On the Account Activity page, click 🔍 to see recent invoices (billed during this month), that will be included in your upcoming pay and beyond, sorted by invoice number.

4. To view other activity, use one or more search filters (If **Search By** pane not visible, click ▤):

   - **Account Status**

     Click in the field, then scroll to an option and click **Set** to select it:

     - **ALL** – Default. To view invoices for both your next paycheck and beyond.

     - **Next Pay** – To see invoices that will be paid on the next pay day.

     - **Payables** – To see invoices that are still outstanding (i.e., still owed to you).

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

     To find invoices for different scheduled job time periods, click in a date field, then scroll to a month, day, and year. Click **Set** to select the date.

   - **Job No.**

     To find invoices for a job, click in the field. Enter the job number using the keypad. Then click **Set**.

   - **Case**

     To find 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.

- **Witness**

  To find invoices for a specific witness, click in the field, then enter part of the witness's name 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, click ❯ on the related job listing. On the View Invoice page, all information is read only. Scroll down to **Pay Detail** to see the line items and their amounts that are included in the invoice.

Viewing pay statements

If you no longer receive a hard copy of the resource payroll report with each paycheck, view and print out your current and past payroll reports from RB Connect Mobile.

1. To find your pay statements, click ☰.

2. On the menu page, click **Pay Statement.**

3. In the Search By pane on the Pay Statement page, specify the following parameters:

   - **Year**

     Default is this year. To select a previous year, click in the field, then scroll to the desired year and click **Set.**

   - ***Pay Date**

     Required. Click in the field, then scroll to the desired pay date and click **Set.**

   - **Show Detail**

     To change from the default, click in the field, then scroll to the desired option and click **Set.**

     - **No** – Default.

     - **Yes** – To see invoices with details.

4. Click ⬇.

5. All of the invoices paid on the selected pay date appear in a report in a new window in your browser. Depending on your browser, you can save, print, or perform other functions on the report.

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**

  View a files or download it to save it on your device. Depending on your browser, you can also 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 shared files in your task repository, such as word lists or dictionaries from jobs in cases other reporters have worked on. Find non-job related files, such as employment agreements and contracts, in your personal repository.

1. To see your files, click ▤.

2. On the menu page, click **Repository.**

3. In the Repository window'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.

        Task – Default. Files tied to your tasks, jobs and cases. No other specific filter is required, but you must use at least one other when searching your task repository.

        Personal – Files not related to jobs/cases, such as contracts.

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

        Task repository only

        Default is current month. To find files for jobs scheduled for other dates, click in each field, then scroll to a month, day, and year. Click **Set** to select the date.

    - **Job No.**

        Task 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.

    - **Case**

        Task repository only

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

- **File Name**

  Personal repository only

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

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

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 .

   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

Viewing your time off

View your scheduled and requested time off in monthly charts.

1. To see your scheduled time off and the status of your time-off requests, click .

2. On the menu page, click **Availability.**

3. The current month appears on the Availability page with any time off scheduled or requested appearing in a list. To:

    - **View different months** – page through months by clicking and next to the month and year calendar title.

    - **View a time-off request** – Click the time-off date in the list. On the View Time-Off page, all information is read only. If you want to delete a future time-off item, click . Then click **Yes** in the popup that appears.

4. To request time off, see Requesting time off.

Step-by-step instructions

- Requesting time off

Requesting time off for a day or less

Make requests for a day off or for part of day off on your mobile device. Then monitor the status of your requests.

1. To request time off, click ▤.

2. On the menu page, click **Availability.**

3. The current month appears on the Availability page with any time off scheduled or requested appearing in a list.

4. To request time off, click ＋.

5. On the Request Time-Off page, enter your request:

   - **Date Type**

     Leave as default of "Once" for a request for a single day or less. (For multi-day requests, see Requesting time off over multiple days.)

   - ***Time-Off Reason**

     Required. Click in the field, then scroll to the reason for your request in the spinner. Click **Set** to select the reason.

   - ***Date**

     Required. To enter the date for which your time-off hours apply, click in the field, then scroll to a month, day, and year. Click **Set** to select the date.

   - **All Day**

     Leave checked to request an entire day off, otherwise uncheck the box and fill in the times below.

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

     Hours request type only

Required. To enter times, click in a time field, then scroll to the hour, minutes, and morning/afternoon. Click **Set** to select the time.

- **Remarks**

  Click in the field, then enter your explanation for your request using the keyboard. Click **Done** to exit the keyboard.

6. Click . Your request is automatically sent to our office. If your requested time off is:

- **Within our request black-out range –** You will see a pop-up denying your request and including the minimum number of business days in the future your requested time off can be. Click **OK.**

- **Outside our request black-out range –** Your request appears in the **Time-Off** pane on the Availability page with a "Pending" status. If you want to remove the request, click it. Then click on the View Time-Off page, and click **Yes** in the popup that appears.

NOTE: Follow time-off request status online

You can check the status of your requests on the Availability page. If you have the option to use online Support Tickets, you can use them to correspond with the office about your request. See Asking for help & other information.

Reference

- Support Tickets

Step-by-step instructions

- Viewing your schedule

- Requesting time off over multiple days

- Asking for help & other information

Looking up firms

Look up a firm's street address and get driving directions. Find phone numbers and call from the same screen. Find contact information for the firm's employees and send them email.

1. To find information about firms, click ▤.

2. On the menu page, click **Firms.**

3. In the Firms page's **Search By** pane, no search filter is required, but you must use at least one:

   - **Firm Name**

     Click in the field, then enter part of the firm's name using the keyboard. Click ⌄ to move to the next field or click **Done** to exit the keyboard.

   - **City**

     Click in the field, then enter part of the firm's city using the keyboard. Click **Done** to exit the keyboard.

4. Click 🔍. All firms that meet the search criteria appear on the Firms page.

5. Click a firm to get driving directions or other information about the firm and its contacts.

6. On the View Firm page, the firm's contact information appears, including a list of employees and their email addresses.

   - **To get driving directions** – Click the hyperlinked address in the **Address** field, then scroll to a service (Google Maps, MapQuest Maps, or Bing Maps) and click **Set.** The location map appears in a separate window where you can access directions.

   - **To call the firm** – Click a hyperlinked phone number, then click **Call** in the popup.

To send an email – Click the email address in the **Contacts** pane for the contact (person who works at the firm) you want to correspond with to open your email program with the **To** and **From** fields already filled in with the selected contact and your email addresses.

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.

Step-by-step instructions

- Updating your password

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**

  View current jobs, and upload files.

- **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 ❯ next to 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

    - 🗑 Delete

    - ✕ 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 keyboard or 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.

Continued from Viewing your calendar.

1. 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 ▼.

2. In the **Search By** pane, no filter is required, but you can narrow your search results by entering text and making selections:

   - **Type**

     To select a type, click in the field. Then scroll to the desired option and click **Set** to select it.

     - **Assigned** – Default. Jobs that have been assigned to you.

     - **Client Of** – Jobs that you will receive a commission from and that you can request to handle if not already assigned to. See Requesting assignments.

     - **Sale Rep** – Jobs that you will receive a commission from. See Viewing your sales commission calendar.

   - **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. Default is the current month and any jobs in the month that fit the **Type** selected appear.

     - **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.

- **Date Type**

  To change date type, click in the field. Then scroll to the other option and click **Set** to select it.

  - **Job Date** – Default. Scheduled job date.

  - **Order Date** – Date a write-up was ordered for a previously billed non-transcribed job.

- **Date From/Date To**

  List View only
  Default is from today to all future job dates. To change date range, click in eacj 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.**

- **Ordering Firm**

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

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

Reference	Step-by-step instructions
• Job	• Requesting assignments
• Client Of	• Viewing your sales commission calendar
• Sales Rep	• Setting preferences
• Preferences	• Viewing job details

Viewing your sales commission calendar

If you are a sales representative or account executive, you can see who is scheduling jobs with your company and how many they scheduled or canceled, plus view their jobs' details.

1. To view your clients' jobs, click **Jobs.**

2. In the **Search By** pane:

   - **Type**

     Select Sales Rep in the drop-down.

   - **View Style**

     Select List in the drop-down.

   - **Date From/Date To**

     Default is from today to all future job dates. Change date range, if desired.

   - To narrow results further, see Viewing your calendar.

3. Click . All of your clients with jobs that fit the search criteria appear in the list. Jobs are grouped by ordering firm and show each firm's total scheduled and canceled jobs for the date range selected.

4. To see a firm's jobs, click the hyperlinked firm name. The listing expands to show the related jobs.

5. To see a job's, click its hyperlink. In the Jobs > Job window, the information for the job you clicked appears.

Reference

- Job

Step-by-step instructions

- Viewing your calendar

Viewing general job information

Find the most essential information about the job, such as when the job is scheduled to occur.

1. Continue from Viewing job details.

2. In the **General** pane on the View Job page, no fields are editable, but you can find:

   - **Job No.**

     Assigned job's number in our system

   - **Job Date**

     Scheduled job date

   - **Start Time/End Time**

     Time range for your assigned job

   - **Status**

     Where the job is in our workflow

   - **Job Type**

     Category of job

   - **Time Zone**

     Applicable time zone for the **Start Time/End Time** range

   - **Adjust clock for daylight saving changes**

     If box is checked, the clock tracks time based on the Daylight Savings Time calendar.

   - **Witness**

     Witness's name(s)

   - **Subpoenaed Witness**

If box is checked, the witness has been summoned to appear.

- **Expert Type**

  If applicable, the witness's expertise

- **Case**

  If applicable, the case name

- **Case No.**

  If applicable, the case number

- **Specialties**

  If the job requires specific expertise or knowledge, any required specialties are noted.

- **Resource Notification Notes**

  Any additional job information not included elsewhere on the form

Reference

- [Job](#)

Step-by-step instructions

- [Viewing your calendar](#)

- [Viewing ordering party information](#)

- [Viewing job locations](#)

- [Viewing task information](#)

Viewing ordering party info

See basic information about the ordering client.

1. Continue from [Viewing job details](#).

2. In the **Ordering Client** pane on the View Job page, no fields are editable, but you can find:

- **Ordering Firm**

  Client firm ordering the job

- **Ordering Contact**

  Person at client firm who ordered the job

- **Phone**

  Client's phone number

- **Fax**

  Client's facsimile number

- **Scheduled By**

  Person at client firm who scheduled the job

- **Firm Calendar Notes**

  Notes about the firm in relation to the job

- **Contact Calendar Notes**

  Notes about the contact in relation to the job

Step-by-step instructions

- [Viewing your calendar](#)

- [Viewing general job information](#)

- [Viewing job locations](#)

- [Viewing task information](#)

Viewing job locations

Review information about the job location and get directions.

1. Continue from Viewing job details.

2. In the **Job Location for In-room Participants** pane on the View Job page, no fields are editable, but you can find:

   - **Location**

     The location's name or other identifier

   - **Address**

     Job location's street address

     To view the job location on a map in a new window and get directions, click the hyperlinked text in the **Address** field. Then scroll to the desired map service and click **Set.**

   - **City**

     Job location's city name

   - **State**

     Job location's state

   - **Zip**

     Job location's zip code

   - **Phone**

     Job location's phone number

   - **Directions**

     Instructions for finding the location

   - **Location Notes**

     Notes about the location in relation to the job

3. If the job is a remote or hybrid meeting you will find Zoom meeting information under **Location for Remote Participants:**

- **URL**

    Web address for the Zoom meeting

- **Notes**

    Zoom meeting ID and passcode plus dialup numbers for the meeting

Reference

- [Job](#)

Step-by-step instructions

- [Viewing general job information](#)

- [Viewing ordering party information](#)

- [Viewing task information](#)

Viewing task information

Review information about the assigned task.

1. Continue from Viewing job details.

2. In the **Task** pane on the View Job page, no fields are editable, but you can find:

    - **Task**

        Type of work involved in the job

    - **Order Date**

        Date the job is scheduled to take place

    - **Due Date**

        When you are required to complete the task

    - **Start Time/End Time**

        Blank unless the time range for your assigned task is different from the job's **Start Time/End Time** in the **General** pane. See Viewing general job information.

    - **Notified Date**

        Date you were given the task

    - **Acknowledged Date**

        When you accepted the job. If you haven't acknowledged the job yet, click ⋯ > **Set Acknowledged Date.** Then click **Yes** in the popup.

    - **Cancelled Date**

        Date job was canceled

    - **Turn In/Completed Date**

        Date job was entered into production process, and production staff marked your task completed

- **Estimated Pages**

  Your estimate, after taking the depo, of how many pages the transcript will be. To update this information, click ⋯ **> Set Estimated Pages & Delivery Date.** Then click **Estimated Pages** and use the keypad to enter the number of pages and click **Set.** Then click 💾 to save.

- **Estimated Delivery Date**

  Your estimate, after taking the depo, of when you will finish the transcript. To update this information, click ⋯ **> Set Estimated Pages & Delivery Date.** Then click **Estimated Delivery Date** and scroll to the desired date and click **Set.** Then click 💾 to save.

- **Check In Date**

  Date and time recorded when you clicked ⋯ **> Check In** upon arrival at the job location

- **Task Status**

  Current stage of the task. If you have the option to change task status, click ⋯ **> Change Task Status.** Then:

  1. Click in the ***Status to be** field *(required)* and scroll to the new status, then click **Set** to select it.

  2. Enter any notes about the status change in **Remarks.**

  3. Click 💾 to save.

- **Remarks**

  Notes entered by in-house staff about the task

- **Personal Notes**

  Any notes you entered about the job that are relevant to you, such as what you wore to the job. These notes are for your reference only and cannot be accessed by anyone else. To add notes click ⋯ **> Set Personal Notes.** On the Set Personal Notes page click in the field and use the popup keyboard to enter your notes. When finished click 💾 to save your notes.

Reference

- Job

- Task

Step-by-step instructions

- Viewing your calendar

- Viewing general job information

- Viewing ordering party information

- Viewing job locations

Client Of

Client Of refers to resources who have their own clients, whose jobs they can cover. For example, reporters who brought clients with them when they joined an agency. These are different from sales reps, who make sales and handle clients, but don't cover jobs.

Reference

- Sales Rep

Step-by-step instructions

- Viewing your calendar

- Requesting assignments

Sales Rep

Sales Rep refers to resources who are sales representatives or account executives for the company. Sales reps are different from Client Of resources who have their own clients whose jobs they can cover.

Reference

- Client Of

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.

Requesting time off over multiple days

Make requests for time off over a set of days at once on your mobile device. You can request whole days off, for example when you are planning a vacation, or you can request set time periods over multiple days, for example when you are taking a course. Then you can monitor the status of your requests on your device.

1. To request time off, click ▤.

2. On the menu page, click **Availability.**

3. The current month appears on the Availability page with any time off scheduled or requested appearing in a list.

4. To request time off, click ＋.

5. On the Request Time-Off page, enter your request to take off more than one day or the same time period on more than one day:

   - **Date Type**

     Click in the field, then scroll to "Recurring" and click **Set** to select it. (For requests for a single day or less, see Requesting time off for a day or less.)

   - ***Time-Off Reason**

     Required. Click in the field, then scroll to the reason for your request in the spinner. Click **Set** to select the reason.

   - **Occurs**

     Click the radio button for the kind of recurring time-off:

     - **Daily** – Default. For time-off over a consecutive set of days.

     - **Weekly** – For time-off on the same day(s) of the week. If you select "Weekly," then check the boxes for the day(s) of the week you are requesting under **Weekdays.**

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

  Required. To enter your time-off date range in these fields, click in a date field, then scroll to a month, day, and year. Click **Set** to select the date.

- **All Day**

  Leave checked to request an entire day off, otherwise uncheck the box and enter times below.

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

  Hours request type only

  Required. To enter times, click in a time field, then scroll to the hour, minutes, and morning/afternoon. Click **Set** to select the time.

- **Remarks**

  Click in the field, then enter your explanation for your request using the keyboard. Click **Done** to exit the keyboard.

6. Click 📩. Your request is automatically sent to our office. If your requested time off is:

   - **Within our request black-out range –** You will see a pop-up denying your request and including the minimum number of business days in the future your requested time off can be. Click **OK.**

   - **Outside our request black-out range –** Your request appears in the **Time-Off** pane on the Availability page with a "Pending" status. If you want to remove the request, click it. Then click 🗑 on the View Time-Off page, and click **Yes** in the popup that appears.

NOTE: Follow time-off request status online

You can check the status of your requests on the Availability page. If you have the option to use online Support Tickets, you can use them to correspond with the office about your request. See Asking for help & other information.

Reference

- Support Tickets

Step-by-step instructions

- Viewing your schedule

- Asking for help & other information

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, update your personal contact information as needed by clicking in a field and using the keyboard, 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.)

Address

Your street address.

- **City**

  Your city or town.

- **State**

  Your state, province, or territory.

- **Zip**

  Your postal code.

- **Main Phone**

  Your preferred phone number or landline.

- **Alt. Phone**

  An additional phone number you want us to have.

- **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](#)

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.**

Setting preferences

Customize your job request defaults.

1. In RB Connect, click ☰ .

2. On the menu page, click **Personal > Preferences.**

3. 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.

4. If you want to reverse the app's lightness and darkness, click **Use Dark Mode.**

   - **No** – Default dark on light.

   - **Yes** – Reverse/light on dark mode.

5. To save your revised preferences, click 💾 .

Reference

- [Jobs](#)

Step-by-step instructions

- [Viewing your calendar](#)

Preferences

Set preferences to customize your experience in RB Connect Mobile.

Step-by-step instructions

- Setting personal preferences