RB Connect User Guide
for reporters and other resources
version 9.52

RB Connect User Guide

Table of contents

Program Basics

RB Connect is an online service that works within a browser on your desktop, laptop, or tablet. There is nothing to install on your own hardware.

Familiarize yourself with RB Connect with these basics first:

- **Log in**
- **Interface**
- **Help**
- **Personal options**

NOTE: Automatic time-out

RB Connect automatically times out after 20 minutes. Online timeouts are required for security reasons. RB Connect 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 desk.**

Jobs

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

Reference

- Job

Step-by-step instructions

- Viewing your calendar
- Viewing job details
- Acknowledging jobs
- 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.

Reference

- Task

Step-by-step instructions

- Viewing your outstanding tasks

Turn In

Submit finished jobs online, including witness information, parties and services ordered, and transcript and exhibit files, using the Turn In wizard that breaks down the process into 4 steps and includes onscreen instructions.

Reference

- Job

Step-by-step instructions

- Turning in jobs online

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 download, and print out your current and past payroll reports.

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, such as the word list, dictionary and exhibits, from the repository. You can upload files here to these jobs, or upload them during Turn In. This is also where you can access relevant files that the office has uploaded.

Reference

- Turn In

Step-by-step instructions

- Using repositories
- Searching repositories
- Downloading & viewing files
- Uploading files

Master Word List

You can compile a Master Word List for any or all ASCIIs belonging to the same case. You can export word lists as either PDFs or as text files.

Reference

- ASCII
- PDF

Step-by-step instructions

- Compiling your own word lists

Availability

View your assigned job times, open time slots and time off in monthly charts. Make online requests for time off. Then monitor the status of your requests.

Step-by-step instructions

- Viewing your schedule
- Requesting time off for a day or less
- Requesting time off over multiple days

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
- Replying to support ticket reponses
- Customizing messages
- Closing support tickets
- Re-opening support tickets

Your personal options

Update your contact information; view the dashboard; change your login name, password and other preferences; access the user guide; or log out of the program.

- **My Profile**
- **Dashboard**
- **Change Login Name**
- **Change Password**
- **Preferences**
- **User Guide**
- **Log Out**

Log in

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

RB Connect 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 interface

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

- **Modules & functions**
- **Function layout**
- **Date Navigator**
- **Repository**

Help

Contextual help is always available from the menu bar by clicking **Help.** The entire RB Connect 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, print assignment notifications, download and upload job files, check in at the job location, add information, and request assignments.

1. ## Set search criteria

   1. To see your jobs, click:

      - **Jobs** in the main menu.

      - **More >** in the **Top 10 Upcoming Jobs** header in the Dashboard.

   2. If viewing as calendar pages, the current month of your assigned jobs appear. If you want to limit what jobs appear or if you want to view jobs in a list, use the filters in the **Search By** pane:

      - **Type**

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

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

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

      - **View Style**

        Default is set in Preferences. See Setting preferences.

        - **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.

      - **Date Type**

        - **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. Change date range, if desired (see Date Navigator).

      - **Job No.**

        Assigned – List View only
        Enter the entire job number.

      - **Case**

        Enter part of a case's name.

      - **Ordering Firm**

        Enter part of a client firm's name.

2. ## View results

1. Click .

   - All jobs that fit the search criteria appear in the results pane/monthly calendar. Jobs are color coded by status. Refer to the **Job Status Color** key under the **Search By** pane for each color's meaning.

   - If viewing as Calendar pages, see [Viewing monthly calendars](#).

   - If viewing as Assigned in List View, listings include job number, date, job time range, and status; witness; task, task time range,date task was ordered, and date task was canceled; ordering client; and case.

   - If viewing as Client Of or Sales Rep in List View, listings are by client with totals for their scheduled and canceled jobs. To see the included jobs, click the hyperlinked **Ordering Firm.** Job listings include job number, date, time range, and status; witness; ordering contact; scheduling contact; and case.

2. Click a hyperlinked job to:

   - [View details](#)

   - [Add job to your external calendar](#)

   - [Print assignment notification/worksheet](#)

   - [Check in at the job location](#)

   - [Download files](#)

   - [Acknowledge/accept the job](#)

   - [Upload files](#)

   - [Set estimated pages & delivery date](#)

   - [Add personal notes about the job](#)

   - [Request assignment to your client's job](#)

Reference

- [Job](#)
- [Dashboard](#)
- [Client Of](#)
- [Sales Rep](#)
- [Preferences](#)
- [Date Navigator](#)

Step-by-step instructions

- [Requesting assignments](#)
- [Viewing your sales commission calendar](#)
- [Setting preferences](#)
- [Viewing monthly calendars](#)
- [Viewing job details](#)
- [Downloading & viewing files](#)
- [Uploading files](#)

Viewing job details

Review individual assigned jobs in detail including their current status, appearance attorneys and their requested services. Acknowledge the job. Add the job to your personal calendar.

Get directions, job worksheet, and job-related files. Contact resources who worked on the same case previously. Upload/download files. Check in at the job location. Enter information about the job.

Continued from [Viewing your calendar](#), [Viewing monthly calendars](#), [Viewing your outstanding tasks](#), or [Using your dashboard](#).

- ## View details

  After clicking into a job from your job calendar or dashboard, the current information for the job appears, grouped in panes. The following panes are non-editable:

  - **General:** The most essential information about the job. See [Viewing general job information](#).
  - **Ordering Client:** Basic information about the ordering party. See [Viewing ordering party information](#).
  - **Job Location:** Information about where the job is scheduled to occur. See [Viewing job locations](#).
  - **Parties:** Who is scheduled to attend and any services they have requested.
  - **Previous Resources:** If you have this option, it shows which resources were previously assigned to the same case. To contact a resource, click the corresponding email address highlighted in blue or call the listed phone number.

- ## Manage files

  - Scroll or jump to the **Repository** pane to:

    - Download files for the job. See [Downloading & viewing files](#).
    - Upload new files. See [Uploading files](#).
    - Request the deletion of old/unneeded files. See [Requesting file deletions](#).

  - If you have the option, scroll or jump to the **Related Files** pane to get additional files uploaded to the repository for the case. See [Downloading & viewing files](#).

- ## Update task

  - Scroll or jump to the **Task** pane to:

    - Accept/acknowledge the job. See [Acknowledging jobs](#)
    - Enter estimated pages, estimated delivery date, and personal notes about the job. See [Updating task information](#).

  - When you arrive at the job location, click **Check In** at the top of the window to record your arrival time in the job's Task pane and let your agency know you arrived. The **Check In** button is only active the day of the job; otherwise it is grayed out.

- ## Additional options

  - To add the job to your external calendar, click **Add To Calendar** at the top of the window and select your calendar format. Depending on your selection, RB9 will send the job to your Google, Outlook, Calendar, or Yahoo calender in the browser, or create a .ics file to import into other calendars.

  - If you would like a hard copy of the job assignment worksheet to take with you, click **Print Assignment Notification** at the top of the window. From the **Print Assignment Notification** panel, you can export the worksheet in a variety of formats or print it. See [Printing worksheets & statements](#).

Reference

- [Job](#)
- [Dashboard](#)
- [PDF](#)

Step-by-step instructions

- [Viewing monthly calendars](#)
- [Viewing your outstanding tasks](#)
- [Using your dashboard](#)
- [Viewing general job information](#)
- [Viewing ordering party information](#)
- [Viewing job locations](#)
- [Downloading & viewing files](#)
- [Uploading files](#)
- [Requesting file deletions](#)
- [Acknowledging jobs](#)
- [Updating task information](#)
- [Printing worksheets & statements](#)

Acknowledging jobs

Accepting a job online is quick and easy.

Continued from Viewing your calendar.

1. To accept an assigned job, click its hyperlink in Jobs or the Dashboard.

2. In the Jobs > Job window, scroll or jump to the **Task** pane.

3. Click **> Set Acknowledged Date.**

4. In the pop-up that appears, click **Yes.** The office is notified of your acknowledgment, and the current date and time are added to the pane under **Acknowledged Date.**

Reference

- Job
- Dashboard

Step-by-step instructions

- Viewing job details

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
- Acknowledging jobs
- Viewing your outstanding tasks

Viewing your outstanding tasks

See your tasks to be completed in a glance, and select one to turn in.

1. To view your outstanding tasks, click:

   - **Tasks in Progress** in the main menu.

   - **More >** in the **Top 10 Overdue Tasks** header in the Dashboard.

2. Assigned tasks that you have not turned in yet are listed by job number and include basic information such as the type of task and its current status in the listing in the main **Tasks in Progress** window. Sort tasks by any of the columns by clicking the column header. To view job details click a task's hyperlinked job number. See Viewing job details.

3. To turn in a task, click the radio button next to its job number in the main **Tasks in Progress** window, then click **Turn In.**

4. The first step of the turn-in wizard opens with basic job, task, and case information already entered. To begin turning in the task, see Entering basic job information.

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

Step-by-step instructions

- Viewing job details
- Entering basic job information

Turning in jobs online

Our Turn-in wizard guides you through a series of easy steps for entering billing information and uploading transcripts and related files. You do not have to turn in a job all at once. RB Connect remembers your saved entries so you can complete turn-in at a later time.

1. ## Find job

   1. To turn in a job, click **Turn In.**

   2. In the Turn In window, enter either:

      - ### Job No.

        Job number of job you are turning in.

      - ### Job Date From/Job Date To

        Date or date range of job you are turning in. See Date Navigator.

      ### TIP: Use Job Date From only

      If you don't know the job number, you can leave **Job Date To** blank for recent jobs and enter **Job Date From** only. RB Connect does not display any of your future scheduled jobs in Turn In.

      ### NOTE: Some jobs may not appear in Turn in

      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 Turn In list.

   3. Click .

   4. In the results returned, click the hyperlinked job number of the job you are turning in.

2. ## Enter basic information

   In Turn In > 1: Job, basic information about the job appears. To enter or update information, see Entering basic job information.

3. ## Add witnesses & upload files

   In Turn In > 2: Witnesses, enter information about witnesses and upload files. See Adding or updating witnesses.

4. ## Add ordering party

   In Turn In > 3: Invoices, enter ordering parties and generate invoices. See Adding ordering parties.

5. ## Add services

   After designating which party is ordering which witness, the next step is to enter service items for each order.

   1. First, use a predefined billing set and/or use the client's standing order of services to quickly add several service items at once. See Entering service items from billing sets & standing orders.

   2. Then enter other service items manually one at a time. See Adding or updating single service items.

   3. Quickly copy service items from one client to another. See Copying services to multiple invoices.

6. **Add attending parties**

If attorneys attended the deposition, but did not order transcripts at the time, enter them as job parties. See [Adding appearance attorneys](#).

7. **Finish turn-in**

When you have finished entering information and uploading files, generate and submit the billing sheet in Turn In > 4: Confirm & Finish. See [Submitting billing sheets online](#).

Reference

- [Date Navigator](#)

Step-by-step instructions

- [Entering basic job information](#)
- [Adding or updating witnesses](#)
- [Adding firms & contacts](#)
- [Adding ordering parties](#)
- [Entering service items from billing sets & standing orders](#)
- [Copying services to multiple invoices](#)
- [Adding or updating single service items](#)
- [Adding appearance attorneys](#)
- [Submitting billing sheets online](#)

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:

   - **Account Activity** in the main menu.

   - **More >** in the **Total Receivables** header in the Dashboard.

2. In the Account Activity window, click [icon] to see this month's invoices to be included in your upcoming pay and beyond, sorted by invoice number.

3. To view other activity, select one or more search filters in the **Search By** pane:

   - **Account Status**

     Select an option in the drop-down:

       - **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, enter dates in these fields or click [icon] to select dates in the Date Navigator.

   - **Job No.**

     To find invoices for a job, enter the job number into the field.

   - **Case**

     To find invoices for a specific case, enter part of the case name into the field.

   - **Witness**

     To find invoices for a specific witness, enter part of the witness's name into the field.

4. Click [icon] .

5. All potential matches to the information you entered appear in chronological order, oldest first. To:

   - Change the order of the invoices, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order.

   - Export and/or print the results, see Exporting & printing results.

   - View information about an invoice, click its hyperlinked invoice number. In the Account Activity > Invoice window, all information is read only. Scroll or jump down to **Pay Detail** to see the line items and their amounts that are included in the invoice. You can export/print pay details (see Exporting & printing results).

Step-by-step instructions

- Exporting & printing results

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 on RB Connect.

1. To find your pay statements, click **Pay Statement.**

2. In the Search By pane, specify the following parameters:

   - ***Pay Date**

     Required. Click ⬚. In the Lookup Pay Date popup, any pay dates that you were issued a paycheck for are listed. Click a hyperlinked **Pay Date** to select it.

   - **Show Detail**

     - **No** – Default.

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

3. Click 🔍.

4. All of the invoices paid on the selected pay date appear in a report. To view, print, or save the report, see [Exporting & printing reports](#)

Step-by-step instructions

- [Exporting & printing reports](#)

Using repositories

Search for files in a repository. Download files for viewing, archiving, or emailing. Upload files to share. Request files be deleted.

- ## Searching repositories

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

  See Searching repositories.

- ## Downloading & viewing files

  You must download a repository file to view it. You might also download files to archive elsewhere, or to email.

  See Downloading & viewing files.

- ## Uploading files

  Upload files when you add witnesses in Turn In or directly to the repository at any time.

  See Uploading files.

- ## Requesting file deletions

  If you upload the wrong file or no longer want to include a file in a job, you can request its removal.

  See Requesting file deletions.

Reference

- Turn In

Step-by-step instructions

- Searching repositories
- Downloading & viewing files
- Uploading files
- Requesting file deletions

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 find your files, click **Repository.**

2. In the Repository window's **Search By** pane, find files in specific repositories. Use filters to narrow your search:

   - **Repository Type**

     Task – Default. Files tied to your tasks, jobs and cases.

     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, change the date range (see Date Navigator). You can also leave one or both of these fields blank, but if they are both blank, you will have to use **Job No.** or **Case** to search by.

   - **Job No.**

     Task repository only

     Enter a job number to find files related to a single job.

   - **Case**

     Task repository only

     Enter part of the name of a case to find files related to that case.

   - **File Name**

     Personal repository only

     Enter part of the file name to find a particular file.

3. Click [🔍]. All jobs with files that fit the search criteria are listed. To save/view files, see Downloading & viewing files.

Reference

- Date Navigator

Step-by-step instructions

- Downloading & viewing files

Downloading & viewing files

To view a file, download it from a job or the Repository, then open it in the associated program.

1. ## Access file(s)

   - ### From the central repository

     To find files in **Repository,** see Searching repositories.

   - ### From a job

     In a Job window, scroll or jump to the **Repository** pane.

2. ## Download & view file(s)

   1. Check the box(es) of any file(s) you want to download/view. Then:

      - **In the repository,** click **Download.**

      - **In a job,** click in the **Repository** pane header. If you have the option, you can also download related case files from the **Related Files** pane.

   2. The file downloads and is saved on your device based on your browser preferences. After downloading, depending on your browser, the file(s) might automatically open in the program on your device associated with each file's file type. Otherwise, locate the file(s) on your device to open and view. If you download more than one file at a time, they will be saved together in a folder labeled with the download date on your device.

TIP: If only the first file of a multi-download appears, check the Trash

If you are using Safari v17 or higher version on MacOS, the default is to automatically open the first file of the zip file created for downloading. Safari puts the zip file in your Trash folder. Move the zip file out of the Trash folder to unzip and recover the rest of the files. If you prefer to not have Safari do this, go to **Safari > Settings > General** and uncheck the **Open "safe" files after downloading** box. Safari will then save zip files to your Downloads folder.

NOTE: Opening downloaded files

The file extension following the period in the file name (usually three letters like "doc" or "pdf") tells your computer which program to use to open the file. Sometimes though, when you try to open a file, a window appears asking which program to use to open the file. This happens when you do not have a *file association,* which means that either you do not have a program registered to open the file or you do not have a program that is capable of opening that type of file. You must install and/or register a program that can open these files.

Sometimes after installing a new program, the new program takes over opening certain types of files. If you want the files to open in a different program, you must change the file association of these types of files to your preferred program.

To find out how to register or change the file association, refer to your operating system's Help documentation.

Reference

- Jobs

Step-by-step instructions

- Searching repositories

Uploading files

Upload files you want to share for a job or when you add witnesses.

You can upload files of any type and size. However, we generally do not recommend uploading files over 100MB in size. Instead, break up large files into several smaller files before uploading.

Save time by uploading multiple files at a time.

1. ## Select file(s) to upload

    1. (If you are not automatically directed to the **Select Files** panel) in the **Repository** pane of jobs or the **Files** pane of the **Edit Witness** panel in Turn In, click .

    2. In the **Select Files** panel, you can upload files in 2 ways:

        - **Drag and drop** your file(s) into the dotted-border field.

        - **Click the dotted-border field,** then locate and select your file(s) from your computer.

    3. The file(s) you selected will appear above the dotted-border field. If you selected the wrong file to upload, click .

    4. Continue adding files if desired.

    5. When finished adding files to upload, click **Next.**

2. ## Set file options

    In the **New File(s)** panel, enter values for the uploaded file(s):

    - **File Type**
    Required. Select the category the file belongs to, such as ASCII or Exhibit, in the drop-down.

        ### NOTE: Stamp exhibits automatically

        If you have the option, you can stamp exhibits with sequential exhibit numbers automatically when uploading files during Turn In. See Stamping exhibits.

    - **Description**
    Any text entered here is searchable.

    ### TIP: Save time when uploading multiple files

    If you are uploading multiple files and all or some of them are the same file type, click **Set File Type.** Then in the **Set Value** panel, check the boxes of files that are the same file type (or check the header box to select all). Select their common file type in the **File Type** drop-down and click **OK.**

3. ## Upload file(s)

    In the **New File(s)** panel, click **Upload.** Then click **Save** in the **Edit Witness** panel.

NOTE: Removing files

If you uploaded the wrong file or no longer want to include a file, you cannot delete the file yourself, but can request that it be removed. See Requesting file deletions.

Reference

- Job

- ASCII

Step-by-step instructions

- Turning in jobs online
- Adding or updating witnesses
- Stamping exhibits
- Requesting file deletions

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.

PDF

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

Step-by-step instructions

- Printing PDFs from RB Connect
- Printing worksheets & statements
- Stamping exhibits
- Compiling your own word lists

Compiling your own word lists

You can export a Master Word List for all ASCIIs belonging to the same case, for several ASCIIs in a case, or for a single ASCII file. You can export word lists as either PDFs or as text files.

1. To create your own word list for a case, click **Master Word List.**

2. To find a case, use one or both search filters in the Master Word List's **Search By** pane:

   - **Case**

     Enter part of the case name into the field.

   - **Job No.**

     Enter the job number.

3. Click . All cases that meet the search criteria appear.

4. To find ASCII files related to a case, click the hyperlinked case name in the search results.

5. In the Master Word List > Case window, all case-related ASCII files appear in the **ASCII Files** pane. To select the file(s) for your master word list:

   - **Single file**

     Check the box next to the job number of the file you want to create a word list for.

   - **Multiple files**

     Check the boxes next to the job numbers of all files you want in your word list.

   - **All files shown**

     Check the box in the **ASCII Files** header.

6. Click **Create Master Word List.**

7. In the Create Word List pop-up, select the file format of your word list:

   - **PDF**

     Click the radio button, then click **Next.** To customize the Master Word List PDF, see Customizing PDF word lists.

   - **Text**

     Click the radio button, then click **Next.** In the **Create Master List >Text** panel, **Word Count** default is No. If you want to include a word count (the number of times each word appears in the transcripts) in the word list, choose Yes in the drop-down.

8. Click **Export.** The master word list is created and exported to your desktop.

Reference

- PDF

Step-by-step instructions

- Customizing PDF word lists

Viewing your schedule

View your assigned job times, open time slots in your regular schedule, and scheduled time off in monthly charts. View time-off requests and their status at a glance.

1. To see your schedule, click **Availability.**

2. At the top of the screen, any pending time-off requests are listed in the **Time-Off** pane. Your current month's time sheet appears in the **Availability** pane as a list of days, and each column represents one hour over a 24-hour period.

    - **Yellow bars** represent your regular work schedule hours that have not been assigned yet.

    - **Blue bars** represent assigned jobs.

    - **Red bars** represent time-off.

3. To view different months:

    - Page through months using the left and right arrows next to the month and year calendar title at the top of the Availability window.

      ◄ 📅 September, 2018 ►

    - Jump to another month in the same year by clicking the month name and selecting a different month in the drop-down.

    ### TIP: Jump to different years using the drop-down

    If you want to see a month in another year, click the month name at the top of the Availability window, then click the left and right arrows next to the year at the top of the drop-down to reach the desired year, FInally, click the month in the drop-down.

    If you want to jump to a different year, click the year in the drop-down. It changes to the current 10-year span. Click the desired year in the drop-down, then click the desired month.

    If you want to jump to a different decade, click the year in the drop-down to change it to the current 10-year span, then use the left and right arrows in the drop-down to find the desired decade, select the year, and then the month.

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

Step-by-step instructions

- Requesting time off

Requesting time off for a day or less

Quickly make an online request for a day off or for part of day off. Then monitor the status of your requests.

1. To request time off, click **Availability.**

2. Any pending time-off requests are listed in the **Time-Off** pane. Click **Request Time-off.**

3. In Availability > Request Time-off, 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. Select the general reason for your request in the drop-down.

   - ***Date**

     Enter the date for which your time-off hours apply or use the Date Navigator.

   - **All Day**

     Leave as Yes unless you want to request only a part of the day off, then click to select No and enter the time range in the ***Start Time/*End Time** fields or click ⏱ to select times in their pop-up lists *(required).*

   - **Remarks**

     Enter an explanation, if needed, for your request.

4. Click **Save** to send your request.

   - **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.**

   - **If your requested time off is outside our request black-out range:** Your request appears in the **Time-Off** pane with a Pending status. If you want to remove the request, click **Cancel.** In the alert that appears, click **Yes.**

NOTE: Follow time-off request status online

You can check the status of your requests in the **Time-Off** pane. 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

- Date Navigator
- Support Tickets

Step-by-step instructions

- Requesting time off over multiple days
- Viewing your schedule
- Asking for help & other information

Requesting time off over multiple days

Make online requests for time off over a set of days at once. 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 online.

1. To request time off, click **Availability.**

2. Any pending time-off requests are listed in the **Time-Off** pane. Click **Request Time-off.**

3. In Availability > Request Time-off, enter your request:

   - **Date Type**

     Select "Recurring" for a request to take off more than one day or the same time period on more than one day. (For requests for a single day or less, see Requesting time off for a day or less.)

   - ***Time-Off Reason**

     Required. Select the general reason for your request in the drop-down.

   - **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 select Yes for the day(s) of the week you are requesting under **Weekdays.**

   - **All Day**

     Leave as Yes unless you want to request only part of the days off, then click to select No and enter the time range in the ***Start Time/*End Time** fields or click 🕐 to select times in their pop-up lists *(required).*

   - **Remarks**

     Enter an explanation, if needed, for your request.

4. Click **Save** to send your request.

   - **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.**

   - **If your requested time off is outside our request black-out range:** Your request appears in the **Time-Off** pane with a Pending status. If you want to remove the request, click **Cancel.** In the alert that appears, click **Yes.**

NOTE: Follow time-off request status online

You can check the status of your requests in the **Time-Off** pane. 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

- Date Navigator
- Support Tickets

Step-by-step instructions

- Viewing your schedule

Looking up firms

Look up a firm's street address and get driving directions. Find contact information for the firm's employees and send them email.

1. To find information about firms, click **Firms.**

2. In the **Search By** pane, no search filter is required, but you must use at least one:

   - **Firm Name**

     Enter part of the firm's name into the field.

   - **City**

     Enter part of the firm's location into the field.

3. Click . All firms that meet the search criteria appear, including their address and firm type.

4. To get driving directions or contact information for a firm, click its hyperlinked **Firm Name** in the search results.

5. In the View Firm window, the firm's contact information appears, including a list of employees and their contact information. All information is read-only.

   - **To get driving directions** – Click in the Address section and choose a map service (Google Maps, MapQuest Maps, or Bing Maps). The location map appears in a separate window where you can access directions.

   - **To send an email** – Copy the email address in the **Contacts** pane for the contact (person who works at the firm) you want to correspond with to use in your email program.

Asking for help & other information

If you have the option, you can ask questions and make requests online with Support Tickets. After making an inquiry, you can track its resolution and continue the discussion with us online.

1. To make an inquiry, click **Support Tickets.**

2. In the Support Tickets window, any unresolved inquiries are listed (see Following up on support tickets). To start a new ticket, click **New.**

3. In the Support Tickets > New Ticket window, enter the following information:

   - ***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. If you want to format your message, or add hyperlinks and images, see Customizing messages.

4. Click **Send.**

5. To see answers and respond, see Following up on support tickets.

Step-by-step instructions

- Following up on support tickets
- Customizing messages

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 **Support Tickets** in the main menu.

2. In the **Search By** pane, **Ticket Status** defaults to Open with any currently unresolved tickets listed.

    - **Ticket Status**

        - **Open** – Default. Support issues that have not been resolved yet. 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.

        - **Closed** – Tickets you have determined are resolved and rated the performance, or that were otherwise closed. Closed tickets include:

            - **Closed:** You have finished with the issue and rated our response.

            - **Solved:** We have determined that the issue is resolved.

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

        Closed Status only

        Enter a date or date range to see tickets initiated within those dates. See Date Navigator.

3. Click . All of the support tickets that meet the specified search condition(s) from the newest to the oldest appear.

4. Click the hyperlinked **Ticket No.** of a ticket you want to follow up on.

5. Your follow-up options:

    - To view comments & reply to a ticket, see Replying to support ticket reponses.

    - To close a ticket and rate our response, see Closing support tickets.

    - To re-open a closed ticket to continue the discussion, see Re-opening support tickets.

Reference

- Date Navigator

Step-by-step instructions

- Asking for help & other information
- Replying to support ticket reponses
- Closing support tickets
- Re-opening support tickets

Replying to support ticket reponses

View and reply to responses on support tickets.

1. To find a ticket, see Following up on support tickets.

2. In the View Ticket window, any responses to the **Problem/Question** are listed under **Threads.**

3. To continue the conversation, click **Reply.**

4. In the **Reply** panel, enter your follow-up comment in ***Message** *(required).* If you want to format your message, or add hyperlinks and images, see Customizing messages.

5. Click **Save** to send your message.

Step-by-step instructions

- Following up on support tickets
- Customizing messages
- Asking for help & other information

Customizing messages

Customize the appearance of the body of messages. Add images, tables, and hyperlinks to messages.

Continued from Asking for help & other information and Following up on support tickets.

- ## Customize appearance

  In the ***Problem/Question** pane, select text to be customized, then:

  - **B** **Bold**

    Toggle the selected text's weight between the default and bold.

  - *I* **Italic**

    Toggle the selected text's style between the default and italic/oblique.

  - U **Underline**

    Underline selected text, including word spaces, with a single line.

  - **Align Text Left**

    Have selected text line up on left margin only.

  - **Center Text**

    Have selected text align to a midpoint.

  - **Align Text Right**

    Have selected text line up on right margin only.

  - **Justify Text**

    Have selected text line up on both left and right margins.

  - **Insert Unordered List**

    Mark each paragraph of selected text with a bullet.

  - **Insert Ordered List**

    Number each paragraph of selected text.

  - **Indent**

    Move the selected text in from the margin in increments.

  - **Outdent**

    Move the selected text out to the margin in increments. (Will not extend past the margin.)

  - (inherited f... ▼ **Select Font Family**

Scroll up or down the list of fonts and typefaces to select a different font for the selected text.
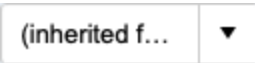
- (inherited f... ▼) **Select Font Size**

Scroll up or down the list of default font sizes to select a different size for the selected text.

- [A ▼] **Color**

Select a color in the default palette as the color for the selected text.

- [◊ ▼] **Background Color**

Select background color in the drop-down for the text area of selected text.

TIP: Insert cursor to change entire section

Instead of highlighting a word or paragraph, depending on what customization is selected, you can simply click to insert the cursor inside the word/paragraph, then apply the customization to the whole

word/paragraph at once. For example, click within a word, then click [B] and the entire word will be bolded.

Click within a paragraph, then click [≣] and the entire paragraph will be indented.

Insert content

In the ***Problem/Question** pane, insert the cursor where you want to add content, then enter text or click:

- [⊖] **Insert Hyperlink**

In the Insert Hyperlink popup that appears:

1. **Web address** – *Required.* Enter the URL address you want to link.

2. **Text** – The URL will appear in the email as a hyperlink unless you enter text you want to be the hyperlink instead.

3. **ToolTip** – Enter text you want to appear as a hint when the cursor is over the hyperlink.

4. **Open link in new window** – Check this box to have the URL appear in a new browser window when clicked.

5. Click **Insert.**

- **To edit the hyperlink,** insert the cursor, then click [⊖].

- **To remove the hyperlink,** insert the cursor, then click [⊖]. The text will remain, but will no longer link to a URL.

- [⊞] **Create a Table**

In the Create a Table popup, either:

- Drag across and down through the boxes to select the number of rows and columns for your table. A 100%-width table with the selected parameters will be created.
- Click **Table Wizard** to enter table parameters in the Table Wizard popup.

- [🖼] **Insert Image**

1. Navigate to an image file (.png, .jpg, or .jpeg) on your device. Then click the new image to select it.

2. Click **Choose.**

Step-by-step instructions

- [Following up on support tickets](#)

Closing support tickets

When an issue has been resolved or you no longer need it to be an active inquiry, close its ticket and rate our response. You can always re-open the ticket at a later date if you want to continue the conversation.

1. To find a ticket, click **Support Tickets** in the main menu.

2. In the **Search By** pane, **Ticket Status** defaults to Open with any currently unresolved tickets listed. If you need to restrict results, see Following up on support tickets.

3. Click the hyperlinked **Ticket No.** of a ticket you want to close.

4. In the Support Tickets > View Ticket window, click **Close Ticket.**

5. In the **Close Ticket** panel, click one of the radio buttons to rate the exchange. Then click **Save.**

6. The ticket's status changes from Open to Closed.

Step-by-step instructions

- Following up on support tickets
- Re-opening support tickets

Re-opening support tickets

You can re-open closed ticket at a later date if you want to restart the conversation.

1. If you should want to re-open a ticket and continue the conversation thread, find the ticket in your closed support tickets (see Following up on support tickets) and click its hyperlinked **Ticket No.**

2. In the Support Tickets > View Ticket window, click **Reopen Ticket.**

3. In the **Reply** panel, enter your comment/question in ***Message** *(required).* If you want to format your message, or add hyperlinks and images, see Customizing messages.

4. Click **Save** to send your message.

Step-by-step instructions

- Following up on support tickets
- Customizing messages

My Profile

Update your contact information at any time.

Step-by-step instructions

- Updating your profile

Dashboard

The Dashboard is your home page that appears every time you sign into RB Connect. It displays general information for you under Announcements, plus:

- Upcoming scheduled jobs assigned to you

- Your overdue tasks

- Total outstanding amount owed to you

Personalize the look of your dashboard by rearranging the layout. Click hyperlinks in your dashboard to get more info and download files.

TIP: Access functions from your dashboard

Click **More >** in the header of a Dashboard pane to access the related function, e.g., clicking **More >** in the **Total Receivables** header opens the Account Activity window where you can look up what invoices have been paid to you already, what invoices are outstanding, and what will be included in your next paycheck.

NOTE: Only Announcements appear in IE browsers

If you want to see and access the other panes in the Dashboard, switch to Google Chrome, Safari, Firefox, or Microsoft Edge as your browser.

Reference

- Account Activity

Step-by-step instructions

- Using your dashboard

- Arranging your dashboard

Change Login Name

Your access to RB Connect might be by your email address or a login name we assigned to you. If we assigned you a login name, you can change this login name at any time.

Step-by-step instructions

- Updating your login name

Change Password

When you are first given access to RB Connect, 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.

Step-by-step instructions

- Setting personal preferences

User Guide

This interactive manual covers all of the functions in RB Connect.

- To access the user guide from its table of contents, click **[your name] > User Guide.**
- To jump to the section of the manual that is relevant to the function you are currently using, click **Help** in the header of the function window.

Log Out

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

IMPORTANT: Save your work
If you do not finish something, such as a job turn-in, before logging out, be sure to save your work first. RB Connect does not automatically save your work for you.

Step-by-step instructions

- Logging out

Logging in

You can use RB Connect 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**
     Enter your work email address or the login name assigned to you.

  2. **Password**
     Enter the password assigned to you.

  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).

  ### 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). 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's Log-in page.

1. On the log-in page, click **Forgot Password.**

2. On the Forgot Password web page, enter your **Login Email** or **Login Name.**

3. In the ***Type the code from the image** field, enter the characters that appear above the field. If you are having difficulty recognizing the characters:

   - Click [🔊] to hear the characters pronounced.

   - Click [↻] to see a different set of characters.

4. Click **Submit.** In the popup that appears, click **OK.**

5. 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.

6. On the Reset Password page, enter a strong password in ***New Password** and ***Confirm New Password** *(both required),* then click **Submit.**

TIP: Avoid account lock-outs

If you attempt to log into RB Connect 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 account.

NOTE: Changing your password

In addition to the **Forgot Password** option, you can change your password within RB Connect 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. Depending on the device:

   - **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 and press **Enter** or **click OK.**

   - **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

Modules & functions

All functions are organized into menus at the top of the web page, grouped by module. Functions are accessible by clicking next to module names.

- ## **Jobs**

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

- ## **Turn In**

  .

- ## **Account Activity**

  View invoices.

- ## **Pay Statement**

  .

- ## **Repository**

  Download files.

- ## **Master Word List**

  .

- ## **Availability**

  .

- ## **Support Tickets**

  Get help and maintain a paper trail of the process.

Reference

- Function layout

Function layout

Functions are laid out in <u>windows</u>, which are divided into <u>panes</u>, with supplemental options in fly-out <u>panels</u>.

- ## Windows

  When you select a function, it opens in the main browser window with a labeled tab at the top. If you open additional functions in this window, they will overlay the existing functions and their labeled tabs will appear at the top of the window.

  - Switch to any open function by clicking its tab.
  - Close a function window by clicking its tab label's X or clicking **Close.**

- ## Panes

  Different aspects of each function appear in their own panes in the function's main browser window. The default view of any function displays all of its related panes.

  - To hide a pane, click 🗖 next to the pane's label.
  - To view a hidden pane, click ⊞ next to the pane's label.
  - Click ▼ next to the window's label and select:
    - Collapse ALL to hide all panes.
    - Expand ALL to view all panes.
    - An individual pane label to jump to that pane.

- ## Panels

  Function options that are accessed by buttons to the right of a field or pane label have their own panels that drop down, pop up or fly out to the right.

NOTE: Required fields
Fields and options that include ***** in their labels require an entry/selection before you can save your work.

TIP: Tab between fields & other shortcuts
Fields in panes and panels are designed so that you can move between them and make some selections without a mouse:

- Use the **Tab** key to move forward from field to field. (<u>Lookup fields</u> are skipped when tabbing.)
- To move backward, use **Shift + Tab.**
- To make a selection in a drop-down, enter the first letter of the selection. If more than one selection begins with the first letter (for example, states that begin with C), pressing the letter key again will advance through the choices that begin with the same letter.

Reference

- Modules & functions
- Lookup panel

Step-by-step instructions

- Searching in RB Connect
- Sorting rows
- Resizing columns
- Entering dates
- Accessing results
- Exporting & printing results

Searching in RB Connect

You search your online database through the **Search By** pane in general function windows or a **Search By** field in a Lookup panel.

Both work similarly:

1. ## Set search parameters

   Use the filters or checklist to enter your search parameters.

   - **Search By panes** have multiple filters to narrow a search.

   - **Lookup panels** have only one filter, the **Search By** field, or they have a checklist of options.

2. ## Get results

   Click ⌕. Any information in the database that meets your search criteria is displayed in a **Results pane**.

   Click the hyperlinked text of your desired result to select it.

Job No.	Job Date	Start Time	End Time	Status	Witn
→ 123527	10/26/2017	9:00 AM	5:00 PM	New	Cliff

Reference

- Search By pane
- Lookup panel
- Results pane

Search By pane

Most main functions include a Search By pane that contains multiple filters to restrict a search.

In most cases, you must set at least one filter in a Search By pane before clicking 🔍. Any filters marked with a red asterisk (*****) must have an entry.

Search filters:

- ### Text-entry fields

  Blank fields with white backgrounds are data-entry fields that you can enter text into directly to search. You can enter full or partial words to search (minimum of 3 characters).

  To view all entries for a single search field, enter 3 percentage signs (%%%) in the field.

- ### Drop-down lists

  Drop-downs display a default option. Click the field's ▼ to select a different option in the drop-down.

- ### Date Navigator

  Click a date field's 📅 to set a date using the perpetual calendar. See Entering dates.

- ### Grayed-out fields

  You cannot type any text in these fields. Instead, click its icon (⛏ or 🖼) to change the information displayed or to delete it. See "Drop-down lists" above or Lookup panels.

- ### Multiple search criteria

  You can apply search filters either one at a time or in combination with each other.

- ### Clear search criteria

  To clear all search criteria at once, click **Search By > Clear All.**

Reference

- Date Navigator
- Lookup panel
- Results pane

Lookup panel

Some sub-functions or panes within windows have their own search capability called Lookup. When you click 🖻
next to a field, a Lookup panel appears. Depending on the field, the Lookup panel's search function is:

- ## Lookup list

  List of search options related to the field. Default is usually ALL. You can select single or multiple items:

  - **Click the Lookup panel's title box** to select all items/clear all checkmarks at once.
  - **Click individual list items' boxes** to select/clear them.

- ## Lookup search filter

  Two-step search function:

  1. ### Search By
     Select a search option in the drop-down.

  2. ### Search Criteria
     Depending on the function, you either:

     - **Enter text in the field** to search for in the database. You must enter at least 3 consecutive characters in a search field. To find all listings, type %%%.

     - **Click in the field,** then select from the drop-down list. Repeat to select more than one filter to search with. Click **X** to delete a filter.

- ## View results

  Click **OK** in lists or in search filters to see entries that match your search criteria.

Reference

- Search By pane
- Results pane

Results pane

When you search for information in RB Connect, it is presented in the results pane as 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.

- ## Locking column

  In some results panes, the leftmost column that contains hyperlinked entries remains visible when scrolling to the right in the results grid.

- ## Record Navigator

  When the results of a search are too numerous to fit in one page, use the Records Navigator at the lower left of the results page to locate the record you want.

  - ### Arrow keys

    Use ◀ and ▶ to page back and forth through the results.

  - ### Skip arrow keys

    Use ⏮ and ⏭ to go to the first or last page.

  - ### Items per page

    Select a number in the drop-down to limit the number of entries displayed per page.

    The lower right side of the pane lists the number of entries in the returned results.

- To view results differently, see Sorting rows and Resizing columns.

Reference

- Search By pane
- Lookup panel

Step-by-step instructions

- Sorting rows
- Resizing columns
- Accessing results
- Exporting & printing results

Sorting rows

The initial results view returned is listed in alphabetical or numeric order of the hyperlinked information in each result. You can sort the information in the data grid by a single column or set of columns in either ascending or descending order.

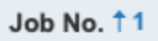- **Ascending/descending sort order**

  The default sorting column is indicated by ↑ in the header. Click the column header to switch to descending sort order. Indicator changes to ↓ and rows re-sort.

- **Sort by a different column**

  To change which column results are sorted by, click the heading of the column you want to sort the rows by. Click the column header again to toggle the sort order between ascending and descending.

- **Sort by multiple columns**

  To sort rows by multiple columns, click the column you want as the first sort variable, then Ctrl-click (Windows OS) or command-click (Mac OS) to select the second sort variable. RB9 numbers the sort indicators for your reference, for example: Job No. ↑1 | Job Date ↑2 . Repeat to select as many columns to sort by as you wish. To toggle the sorting order of a column within the selected set, click the column header while holding down the Ctrl/command key. To disable multiple column sorting, click any column header.

Reference

- Results pane

Resizing columns

You can adjust the width of any column in a data grid. To change a column's width, move the cursor to the divider at the right edge of the column header. The cursor changes to a horizontal double arrow, which you can drag (in either direction) to resize the column.

Reference

- Results pane

Accessing results

To access an individual result in a results pane, click the hyperlinked text in its results row:

Job No.	Job Date	Start Time	End Time	Status	Witn
➜ 123527	10/26/2017	9:00 AM	5:00 PM	New	Cliff

Reference

- [Results pane](#)

Exporting & printing results

While you can use your browser's print function to print screens from RB Connect, if you want to:

- Save information from a search.

- Create a report from search results.

- Print the information in a single pane or panel.

Use the export function to export the data to *Excel* or as a CSV (Comma-Separated Values) file to open in other applications instead.

- ## To export results

  Any pane or panel that has in lower right corner can be exported to *Excel* or as a CSV (Comma-Separated Values) file by clicking the icon. A file will be automatically created in the format selected.

- ## To print results

  If you want to print out results, click and export to *Excel.* You can clean up the results in *Excel,* then print from there.

- ## To save results

  Each time you click and choose an export format, a file is automatically created with a generic name based on the function you exported from and saves it in your Downloads folder. To ensure that you can find the results later, rename the file to something more meaningful and move the file to a folder you designate for the purpose of storing these types of files.

Printing worksheets & statements

Reports, such as worksheets and pay statements, that RB Connect generates cannot be edited in RB Connect. You can export them to various formats or print them.

Generated reports display in a WYSIWYG format with tools in the window header.

To:

- ## Go to the beginning

- Click ◀◀ .

- ## Go back one page

  Click ◀ .

- ## Jump to a specific page

  Type over the number in the page field, 2 /3 , with the number of the page you want. Then press Enter or Return.

- ## Page forward

  Click ▶ .

- ## Go to the end

  Click ▶▶ .

- ## Save file

  Click ⬇ ▾ and select an export file type:

  - ### Acrobat (PDF) file

    File format that preserves a file's text formatting and images

  - ### CSV (comma delimited)

    [Comma-Separated Values] text file format that uses commas to separate field entries

  - ### Excel 97-2003

    Binary file format [BIFF8] to use in *Excel.*

  - ### Rich Text Format

    [RTF] document file format that retains some of a file's text formatting

  - ### TIFF file

    [Tagged Image File Format] file format for storing images

  - ### Web Archive

    [MHTML (short for MIME HTML, which is short for Multi-Purpose-Internet-Mail-Extensions Hypertext-Markup-Language)] cross-platform file format for web pages that saves linked files too, such images.

- ## Print

  Click 🖶. See [Printing PDFs from RB Connect](#).

- ## Zoom in

  Click 🔍.

- ## Zoom out

  Click 🔍.

- ## Toggle between full-page & page width

  Click 🖼.

- ## Search contents

  Click 🔍. In the popup window that appears, enter text to search for in **Find,** then press the Enter or Return key. Any instances of the text that are found will appear listed under **Result # of #** and highlighted in the report. Jump to a particular instance in the report by clicking it in the list. If you search for different text in the same report, you can click ▼ next to the **Find** field and select a previous search string to search again.

You cannot edit these documents. If an invoice, statement, or report is incorrect, you must generate it again.

Reference
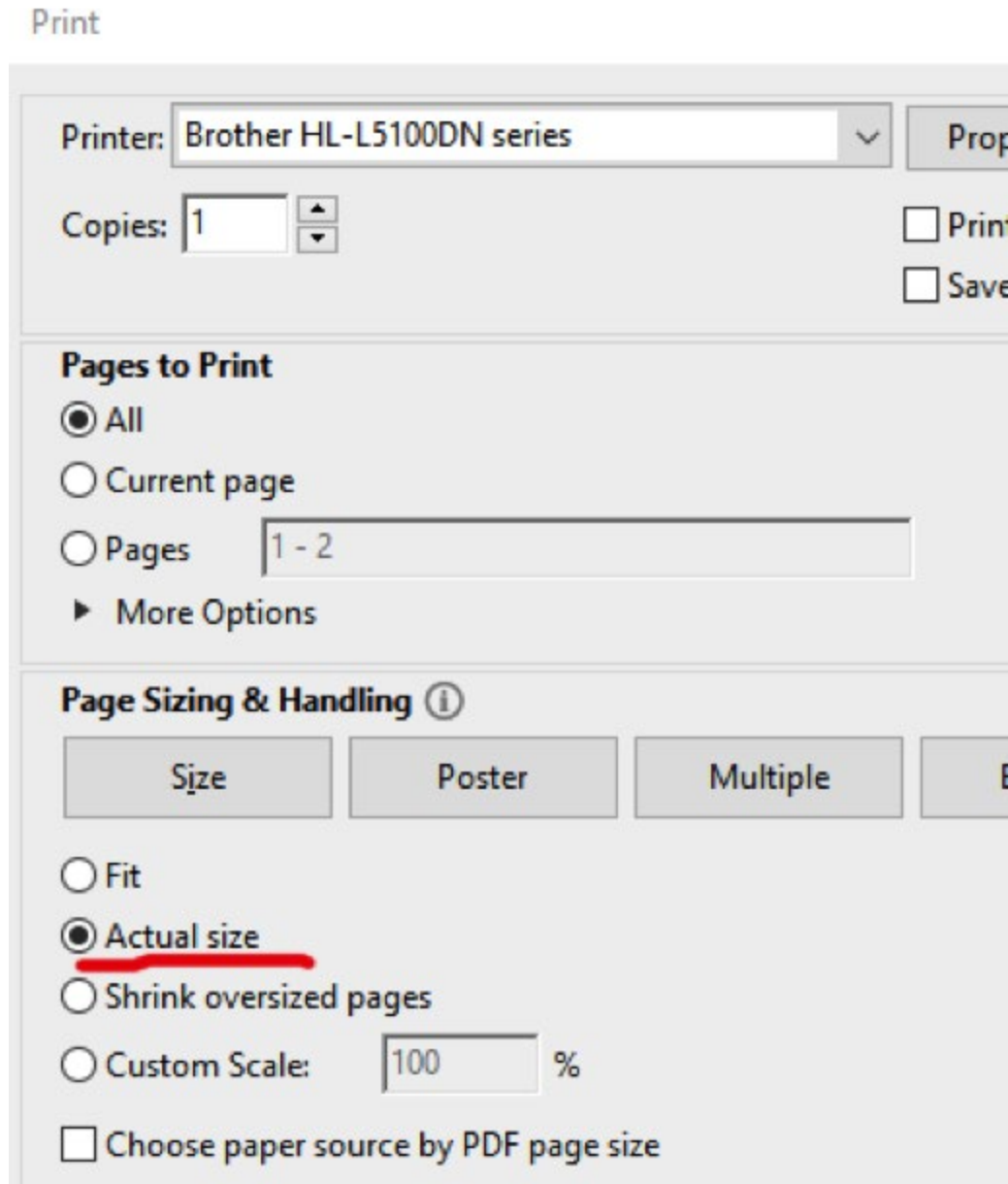
- [PDF](#)

Step-by-step instructions

- [Printing PDFs from RB Connect](#)

Printing PDFs from RB Connect

When printing PDF documents, select the following settings to have the documents print correctly:

- **Downloaded PDF**

    In *Adobe Acrobat's* Print popup, select Actual size in **Page Sizing & Handling.**

- **Directly from browser**

    In the brower's Print window, set **Scale** to 100. (Terminology might differ based on the browser.)

Print

Total: 61 sheets of paper

Print	Cancel

Destination — 🖨 Brother HL-L5100DN se...

Change...

Pages — ⦿ All

◯ e.g. 1-5, 8, 11-13

Copies — 1

Paper size — Letter ▼

Quality — 300 dpi ▼

Scale — ☐ Fit to page

100

Options — ☐ Two-sided

TIP: Use Chrome for printing PDFs

The best browser for RB Connect printing is Chrome because you can print directly from the browser. In Firefox, Edge, or Safari, you have to download PDF first, then print.
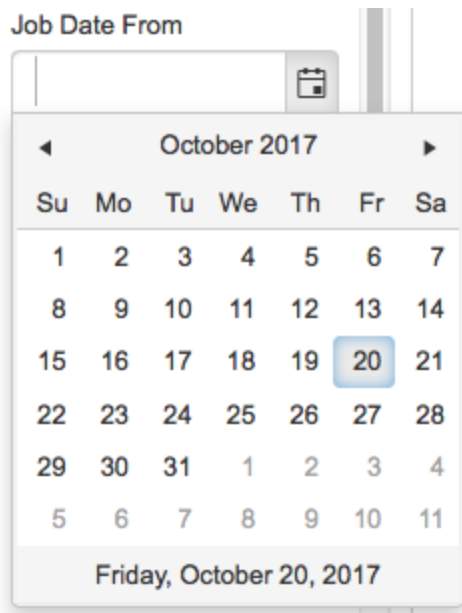
Reference

- [PDF](#)

Step-by-step instructions

- [Printing worksheets & statements](#)

Date Navigator

Every date field in RB Connect has a perpetual calendar, called **Date Navigator,** accessed by clicking 📅. It provides a quick and easy way to add or change dates.
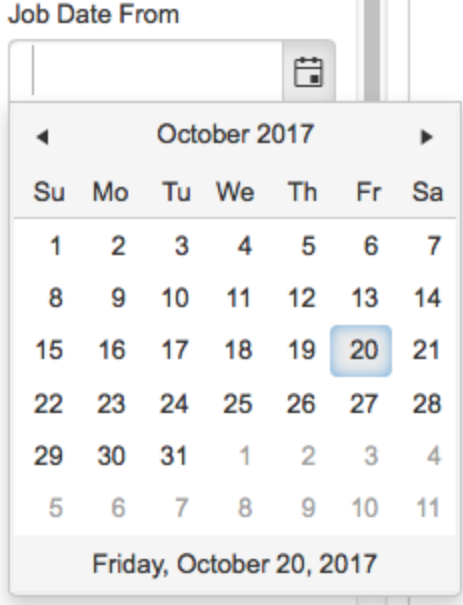
Job Date From

			October 2017			▶
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Friday, October 20, 2017

Reference

- Search By pane

Step-by-step instructions

- Entering dates

Entering dates

Instead of typing in dates, use the Date Navigator attached to every date field to view and select dates.

- ## Select another date

  Click the date you want.

- ## Move to the previous month

  Click ◄.

- ## Move to the next month

  Click ►.

- ## Choose a different month

  Click the month name, then select from the twelve months that appear.

- ## Choose another year

  Click the month name. Then click ◄ or ► next to the year.

TIP: Change dates using your keyboard

You can also change dates by using the keyboard to type the date in the field instead of using the Date Navigator. Use MM/DD/YYYY format.

Viewing monthly calendars

Use the Calendar view style to see your jobs in a month-by-month calendar with brief descriptors of the jobs. A bar at the bottom of each day's box lists additional jobs for the day.

1. Continue from Viewing your calendar.

2. To view more information:

   - Roll over a hyperlinked listing to pop up additional basic information about the job.

   - Click a hyperlinked listing to see complete information about the job, add it to your external calendar, acknowledge the job, print worksheets, upload/download files, enter information related to the job, or check in at the job location. See Viewing job details.

   - Click on the bar at the bottom of a day's box to pop up a window listing all of the day's jobs in a List view style format. Click a hyperlinked listing in the popup to access the job, or click **Close** to return to the calendar page.

   - Page back and forth through months by clicking ◀ or ▶ at the top of the calendar. Return to the current month by clicking **Today.**

   - Jump to a particular month by clicking the month name and selecting a new month in the Date Navigator.

   - If the whole monthly calendar is not visible, use the scroll bars to view hidden sections.

   ### NOTE: Calendar view style customization

   You can customize what identifying information appears in the popup job descriptions, and set a maximum number of jobs to display per day in Preferences.

Reference

- Job
- Date Navigator
- Preferences

Step-by-step instructions

- Viewing job details
- Setting personal preferences

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 (see Date Navigator).

   - 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 export and/or print the list, see Exporting & printing results.

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

Reference

- Job
- Date Navigator

Step-by-step instructions

- Viewing your calendar
- Exporting & printing results

Viewing general job information

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

Continued from [Viewing job details](#).

1. In the **General** pane, no fields are editable, but you can find:

- **Job No.**

  The assigned job's number in our system.

- **Job Date**

  The scheduled job date.

- **Status**

  Shows you where the job is in our workflow.

- **Start Time/End Time**

  Job time range.

- **Time Zone**

  The applicable time zone for the **Start Time/End Time** range.

- **Adjust clock for daylight saving changes**

  If Yes is selected, the clock tracks time based on the Daylight Savings Time calendar.

- **Witness**

  Witness's name(s).

- **Subpoenaed Witness**

  If Yes is selected, the witness has been summoned to appear.

- **Expert Type**

  If applicable, the witness's expertise.

- **Job Type**

  Category of job.

- **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	Step-by-step instructions
• [Job](#)	• [Viewing your calendar](#)

Viewing ordering party information

See basic information about the ordering client.

1. Continue from Viewing job details.

2. In a job's **Ordering Client** pane, 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 job locations

Review information about the job location and get directions.

1. Continue from Viewing job details.

2. In a job's **Job Location** pane, no fields are editable, but you can find:

   - **Location**

     Job location's name or other identifier

   - **Address**

     Job location's street address

     Click > **Google Maps/MapQuest Maps/Bing Maps** to view job location on a map in a new window and get directions.

   - **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

Step-by-step instructions

- Viewing your calendar

Updating task information

Review information about the assigned task and add your own notes.

1. Continued from Viewing job details.

2. In a job's **Task** pane, you can look up information about the task involved in the job and update some fields:

- **Task**

  Uneditable. Type of work involved in the job.

- **Order Date**

  Uneditable. Date the job is scheduled to take place.

- **Due Date**

  Uneditable. When you are required to complete the task.

- **Start Time/End Time**

  Uneditable. Time range scheduled for the task. 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**

  Uneditable. Date you were given the task.

- **Acknowledged Date**

  Uneditable. When you accepted the job. See Acknowledging jobs.

- **Cancelled Date**

  Uneditable. Date job was canceled.

- **Turn In/Completed Date**

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

- **Estimated Pages**

  Uneditable. Your estimate, after taking the depo, of how many pages the transcript will be. To enter your estimate, see Setting transcript estimates.

- **Estimated Delivery Date**

  Uneditable. Your estimate, after taking the depo, of when you will finish the transcript. To enter your estimate, see Setting transcript estimates.

- **Check In Date**

  Uneditable. Date and time recorded when you clicked **Check In** at the top of the window upon arrival at the job location.

- **Task Status**

  If you have the option to update the task's status, click > **Change Task Status.** In the **Change Task Status** panel:

  1. Select the new status in the *****Status to be** drop-down *(required).*

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

3. Click **Save.**

- **Remarks**

  Uneditable. Notes entered by in-house staff about the task.

- **Personal Notes**

  To enter your notes about the job for your own reference, click **> Set Personal Notes.** In the **Set Personal Notes** panel, enter notes about the job that are relevant to you, such as what you wore to the job, in the field. These notes are for your reference only and cannot be accessed by anyone else. Click

  Save. You can edit and update the notes at any time by clicking **> Set Personal Notes** again.

Step-by-step instructions

- [Viewing your calendar](#)
- [Viewing general job information](#)
- [Acknowledging jobs](#)
- [Setting transcript estimates](#)

Setting transcript estimates

Enter information about the transcript for the production staff to plan for.

1. Continue from Updating task information.

2. In a job's **Task** pane, Click > **Set Estimated Pages & Delivery Date.**

3. In the **Set Estimated Pages & Delivery Date** panel, enter:

   - **Estimated Pages**

     The number of pages you estimate the transcript will be.

   - **Estimated Delivery Date**

     The date you estimate you will turn in the transcript. See Date Navigator.

4. Click **Save.**

Reference

- Date Navigator

Step-by-step instructions

- Viewing your calendar
- Updating task information

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

Entering basic job information

The first step in turning in a job is to enter or update some basic information about the job.

Continued from Turning in jobs online and Viewing your outstanding tasks.

1. In the **Job** pane of Turn In > 1: Job, not all fields are editable. Enter or edit the following information, if applicable:

   - **Case**

     If this option has been enabled by the office, you can edit the case name.

   - **Case No.**

     If this option has been enabled by the office, you can edit the case number.

   - **Rush**

     Click to select Yes if this is a rush job.

   - **Notes**

     Enter special notes about this job for the office. Do not enter notes for each witness here. (See Adding or updating witnesses.)

     NOTE: Additional information fields

     Any additional fields that may appear below **Notes** are editable.

2. Click **Next** to save your changes and go to the next screen, Turn In > 2: Witnesses, to add witnesses and upload files. See Adding or updating witnesses.

Step-by-step instructions

- Adding or updating witnesses

Adding or updating witnesses

Enter information about witnesses and upload files. There is no limit to the number of witnesses you can enter for each job.

Continued from Entering basic job information.

1. In Turn In > 2: Witnesses, the **New Witness** panel automatically opens if no witnesses have been added yet for this job. Otherwise, witnesses that have been added already are listed in the **Witnesses** pane.

    1. To add witness information and upload related files:

        ▪ **Existing witness**

        Click the hyperlinked witness name. If the office has already posted an invoice for this witness, you will be able to view the witness details, but not update them.

        ▪ **New witness**

        If the **New Witness** panel did not open automatically, click in the **Witnesses** pane header.

    2. In the **New Witness/Edit Witness** panel's **General** pane, enter/update any field:

    - ***Witness**

      Required. Deponent's name.

    - **Witness Email**

      Deponent's email address.

    - ***Pages**

      Required. Number of pages in the transcript.

    - **Begin Page No./End Page No.**

      Default is 1 and the total number of pages. Changing beginning page number automatically changes end page number.

    - **Volume/Last Exhibit Marked**

      Volume number default is 1. If the deposition is part of an on-going case and the witness will be deposed more than once, you can keep track of the volume number and last exhibit number in these fields for future reference.

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

      Record the times the job began and finished by either entering the times or clicking 🕐 to select them from the drop-downs.

    - **Read & Sign**

      If this option has been enabled by the office, you can indicate that the witness read and signed the transcript by clicking to select Yes.

    - **Read & Sign Date**

      If this option has been enabled by the office, you can enter date the signed transcript was given to you.

    - **Send Original To**

      Location of the original transcript. If the original remains in the office, leave it blank.

Notes

Provide detailed instructions for the production and billing departments for this witness.

- **Exhibits (Are there exhibits?)**

    Default is No. Click the slider to select Yes if there are exhibits.

- **Exhibits (Who retains the exhibits?)**

    If you selected Yes, enter the name of who is the designated custodian of the exhibits.

2. Click **Save. New Witness** panel changes to **Edit Witness** and the **Select Files** panel appears.

3. To upload related files, see Uploading files.

4. Repeat for any additional witnesses.

5. Click **Next** to save the witness(es) and go to the next screen, Turn In > 3: Invoices, to add parties to the job. See Adding ordering parties.

NOTE: Additional information fields

Any additional fields that may appear below **Notes** in the **New Witness** panel are editable.

Step-by-step instructions

- Entering basic job information
- Uploading files
- Adding ordering parties

Looking up firms

Find client firms in our database to have their company information automatically filled in. If you cannot find an ordering or attending party in our database, you can add them.

Continued from Adding ordering parties and Adding appearance attorneys.

1. When the **Lookup Firm** panel opens automatically, enter a partial firm name in **Search Criteria,** then click

    .

2. Click the client firm's hyperlinked **Firm Name (a/k/a)** in the results to select the firm. If the firm's name does not appear, see Adding firms & contacts.

NOTE: Searching firms by alternate names

If you commonly refer to the client firm by another name, you can search by that alias (a/k/a = Also Know As). Aliases appear in parentheses after the firm name in search results.

Step-by-step instructions

- Adding firms & contacts
- Adding ordering parties
- Adding appearance attorneys

Adding firms & contacts

If a firm or contact does not appear in RB Connect search results and you have the option, you can add them when turning in jobs.

Continued from [Looking up firms](#).

1. ## Add firm

   1. When adding an invoice or job party to a job during Turn-In, if the **Sold To Firm** (attending party) or **Bill To Firm** (party who will be responsible for paying any invoices for services ordered on this job) you want to add does not appear in the **Lookup Firm** panel's search results, click **New** in the **Lookup Firm** panel's header.

   2. In the **New Firm & Contact** panel, enter text or make selections in the **Firm** pane:

      - ***Firm Name**

        Required. The name of the firm you are adding.

      - **Address**

        Firm's street address or post office box.

      - **City**

        Firm's city.

      - **State**

        Firm's state.

      - **Zip**

        Firm's postal code.

      - **Phone**

        Main phone number for the firm.

      - **Fax**

        If the firm has a fax number.

2. ## Add contact

   1. There are 2 ways to add a new contact when adding an invoice or job party during Turn-In:

      - **When adding a new firm** – In the **New Firm & Contact** panel, you can add a contact when you add a firm.

      - **Add contact to an existing firm** – In the **New Invoice/New Job Party** panel, click ⊞ next to a **Contact** field. Then add the contact in the **New Contact** panel.

   2. Enter text or make selections in the **Contact** pane.

      - ***First Name**

        Required. Given name of the person you are adding.

      - **Mi.**

Person's middle name or initial.

- ***Last Name**

  Required. Person's family name.

- ***Full Name**

  Required. Click ▼ and select one of the variations of the person's name in the drop-down.

- **Salutation**

  Select the person's title, i.e., how they want to be addressed, in the drop-down.

- **Gender**

  Person's gender classification.

- **Phone**

  Preferred phone number for the person.

- **Fax**

  If the person has a fax number.

- **Email**

  Person's business email address.

3. ## Save entity

   Click **Save.**

TIP: If you do not have the option to add entities online...

If you do not have the option to add firms and contacts via RB Connect, you can include this information in the **Notes** field of Turn In > 1: Job, or upload a file with this information in Turn In > 2: Witnesses.

Reference

- Sold To vs. Bill To

Step-by-step instructions

- Looking up firms

Adding ordering parties

After entering witnesses and uploading files, the next step is to enter parties. For each ordering party entered here, RB9 will generate one invoice. You can enter one ordering party at a time, or select multiple parties at once from the job, case, or previous turn-ins.

If there were attorneys present who did not order at the time, you can add them as job parties, so they can be followed up with later.

Continued from Adding or updating witnesses.

1. In Turn In > 3: Invoices, depending on the job and previous entries, either:

   - The **Prefill Parties** panel opens automatically, so you can prefill/select ordering parties from the job, case and/or previous jobs. Each section appears only if there are relevant parties. Check the box(es) of parties who are ordering services, then click **Next.**

   - The **Lookup Firm** panel opens automatically if there are no applicable prefill parties, so you can select ordering parties from our database. See Looking up firms.

   ## NOTE: More than one ordering party?

   If you already added a firm to bill and want to create additional invoices, click ➕ in the **Invoices** pane header. The **Lookup Firm** panel opens automatically. See Looking up firms.

2. The **New Invoice** panel opens automatically with the ordering party information filled in. Update information if necessary:

   - **Original**

     Click to select Yes if this is the original client.

   - ***Sold To Firm**

     Required. Client who ordered the job.

   - ***Sold To Contact**

     Required. Person at client firm who ordered the job.

     If ordering contact is other than the default contact shown, select the correct contact in the drop-down.

     If the contact does not appear in the drop-down and you have the option, click ➕. See Adding firms & contacts.

   - **Bill To is same as Sold To**

     Click to select No if invoices are to be sent to a different firm and/or contact than in the ***Sold To Firm** and ***Sold To Contact** fields.

   - ***Bill To Firm**

     Required. Company that will pay the invoice for the job (uneditable if **Bill To is same as Sold To** is Yes). Click 🔲 and search for the firm. See Looking up firms.

   - ***Bill To Contact**

     Required. Person at **Bill To Firm** responsible for handling the job's invoice (uneditable if **Bill To is same as Sold To** is Yes).

     If Bill To Contact is other than the default contact shown, select the correct contact in the drop-down.

If the contact does not appear in the drop-down and you have the option, click ⊞. See [Adding firms & contacts](#).

- ***Selected witness(es) to order**

  Required. Default is all listed witnesses are selected. Uncheck any witnesses the **Sold To Contact** is not ordering transcripts or other services for.

3. Click **Save.** The invoice appears in the **Invoices** pane and the ordering party is added to the **Job Parties** pane of Turn In > 3: Invoices.

4. Add services ordered to the invoice. See [Entering service items from billing sets & standing orders](#).

5. **If you have attending attorneys who did not order any services at this time,** add them to the **Job Parties** pane. See [Adding appearance attorneys](#).

6. When you have no more invoices, services, or attending parties to add, click **Next** to save your changes and go to the next screen, Turn In > 4: Confirm & Finish. See [Submitting billing sheets online](#).

Reference

- [Prefill](#)
- [Sold To vs. Bill To](#)

Step-by-step instructions

- [Looking up firms](#)
- [Adding firms & contacts](#)
- [Entering service items from billing sets & standing orders](#)
- [Adding appearance attorneys](#)
- [Submitting billing sheets online](#)

Adding appearance attorneys

If attorneys attended the deposition, but did not order transcripts at the time, you can enter them as job parties if you have a Job Parties pane in Turn In > 3: Invoices.

Continued from [Adding ordering parties](#), [Entering service items from billing sets & standing orders](#), [Copying services to multiple invoices](#), or [Adding or updating single service items](#).

1. If there are attending parties who did not order services (aka appearance attorneys), click ➕ in the **Job Parties** pane.

2. Search for the attending party in the **Lookup Firm** panel. See [Looking up firms](#).

3. The default information for the firm selected populates the **New Job Party** panel. Update the information about the attendance-only party, if needed:

   - ***Firm**

     Required. If the firm selected as the ordering party is incorrect, click 🖼 and search for the correct firm. See [Looking up firms](#).

   - ***Contact**

     Required. If the default contact is incorrect, select the attorney or other person at the firm who placed an order in the drop-down. If the person does not appear in the list and you have the option, click ➕ to add the contact. See [Adding firms & contacts](#).

   - **Party Type**

     - **Unknown** – Default. You do not know which side the party is on.

     - **Same Side** – As ordering party.

     - **Opposing Side** – Of ordering party.

   - **Presence**

     - **Present** – Default.

     - **Not Present** – Party to the case/job, but did not attend the deposition.

     - **Unknown** – Party to the case/job, but you do not know if they attended the deposition.

   - **Bill To is same as Sold To**

     Click to select Yes if the attending party listed in ***Firm/*Contact** will be responsible for paying any invoices for services ordered on this job. Otherwise, leave this as No. You can select a different firm and/or contact in the **Bill To Firm** and **Bill To Contact** fields.

   - **Bill To Firm**

     If the firm responsible for paying invoices related to this job is not the attending party, use this field. Click 🖼 if field is blank or 🔽 **> Lookup Firm** if you want to change the firm listed, and search for the firm that is responsible for paying the invoice. See [Looking up firms](#).

   - **Bill To Contact**

     Select the person at the firm who is responsible for paying the invoice in the drop-down. If the person does not appear in the list and you have the option, click ➕ to add the contact. See [Adding firms & contacts](#).

4. Click **Save.** The appearance attorney appears in the **Job Parties** pane of Turn In > 3: Invoices.

5. Repeat to add additional appearance attorneys to the **Job Parties** pane. When you have finished adding appearance attorneys, click **Next** to save your changes and go to the next screen, Turn In > 4: Confirm & Finish, to review the billing sheet generated and submit the job. See Submitting billing sheets online.

Reference

- Sold To vs. Bill To

Step-by-step instructions

- Adding ordering parties
- Entering service items from billing sets & standing orders
- Copying services to multiple invoices
- Adding or updating single service items
- Looking up firms
- Adding firms & contacts
- Submitting billing sheets online

Stamping exhibits

If you have the option, you can stamp PDF exhibits with sequential exhibit numbers automatically. Only exhibits in the PDF format can be stamped in RB Connect.

Continued from [Uploading files](#).

IMPORTANT: Prepare exhibit files before uploading

To be able to apply numbered exhibit stamps in RB9, exhibit files must be set up correctly before uploading:

- Files must be in PDF format.

- File names must be numbered consecutively.

- If there is any text other an a number in the file name, the number must appear last.

1. If the **Add Exhibit Stamp** slider appears in the top of the **New File(s)** panel when you select Exhibit as the **File Type,** you can have RB Connect automatically stamp and number the exhibit(s) for you. Click to select Yes, then click **Upload.**

2. In the **Set File Name Pattern** panel's ***File Name Pattern** field (required), enter the common portion of the file names of the exhibits being uploaded and include the character "?" at the end where the numbers occur. For example, if you are naming exhibit files Exhibit 1, Exhibit 2, enter Exhibit ?.

3. In the ***Exhibit Stamp** pane, exhibit stamp templates are listed with where they will be placed on exhibit pages (Position), which pages they will appear on (Occurance), and a preview of the stamp. Click the radio button of the stamp you want to apply to exhibits.

4. Click **OK.** The **Set File Name Pattern** panel will close, exhibits will upload, and the **New File(s)** panel will close. Any uploaded exhibits that are in PDF format will have a numbered exhibit stamp automatically applied. You can continue uploading files or if you have no more files to upload, click **Save** in the **Edit Witness** panel.

Reference

- [PDF](#)

Step-by-step instructions

- [Turning in jobs online](#)

Entering service items from billing sets & standing orders

After designating which party is ordering which witness, the next step is to enter service items for each order. Instead of entering one service item at a time, you can use a predefined billing set and/or use the client's standing order of services to add several service items at once.

If you have ever ordered a combo meal at a fast food joint or a bento box lunch at a Japanese restaurant, then you already understand what billing sets are: Pre-set groups of items that speed up the selection process because you only have to choose the set, not all the individual items.

If clients have standing orders of service items they usually want from every job, those items will appear below billing sets.

With both billing sets and standing orders, you can pick and mix items from each group for each job.

Continued from Adding ordering parties.

1. ## Select invoice & witness

    1. In Turn In > 3: Invoices, to add multiple requested services to an invoice at once, click ⊠ **> Prefill Services** in the invoice's **Actions** column.

    2. In the **Prefill Services** panel, the witness you entered in Step 2 is automatically selected in the ***Select witness(es) to prefill service** pane *(required).* If you entered multiple witnesses, they are all selected, uncheck any witness that you do not want to prefill services for at this time.

2. ## Select items from billing sets

    1. Select a **Billing Set** in the drop-down.

    2. All of the service items contained in the selected billing set appear in the pane below. Check the box next to each service item you want to add. Or check the **Service Item** box in the header to select all.

    3. Enter a different amount in **Units,** if desired, for each service item selected. Amount cannot be zero (0).

3. ## Select items from standing orders

    1. In the **Preferred Services** pane, all of the ordering party's standing requests, if any, appear. Check the box next to each service item you want to add. Or check the **From** box in the header to select all.

        Service items are grouped by where the request originated:

        - ### Contact
            The party's standing orders for all jobs.

        - ### Case
            The party's standing orders for jobs on this case.

        - ### Job
            The party's standing orders for this case only.

    2. Enter a different amount in **Units,** if desired, for each service item selected. Amount cannot be zero (0).

4. Click **Save.**

5. Service items selected appear in a pane under the witness name in the invoice. To:

    - **Delete a service item from an order,** check its box, then click ⊖ in the **Invoices & Services** pane's

header. Click **Yes** in the RB9 popup.

- **Update an order's service item,** click the hyperlinked service item name. In the **Edit Service** panel, make changes in the service item fields and click **Save.**

- **Add a service item to an order,** see Adding or updating single service items.

- **Copy service items to other invoices,** see Copying services to multiple invoices.

6. When finished entering service items, add appearance only attorneys (see Adding appearance attorneys). Or if there were no appearance attorneys, click **Next** to save your changes and go to the next screen, Turn In > 4: Confirm & Finish, to review the billing sheet generated and submit the job. See Submitting billing sheets online.

TIP: No billing sets? Add services manually

If you do not see any choices in the **Billing Set** drop-down, your office does not offer billing sets for turn-in. Instead, you must enter service items manually. (See Adding or updating single service items.)

Step-by-step instructions

- Adding ordering parties
- Adding appearance attorneys
- Adding or updating single service items
- Copying services to multiple invoices
- Submitting billing sheets online

Copying services to multiple invoices

Quickly copy service items from one client to another.

Continued from Entering service items from billing sets & standing orders or Adding or updating single service items.

1. In Turn In > 3: Invoices, to copy service items from one invoice to others, click ⏷ **> Copy Services To** in the invoice's **Actions** column.

2. In the **Copy Services To** panel, the invoice you selected to copy services from appears at the top. The other invoices are listed under *****Copy To.** Check the boxes of invoices you want to duplicate service items in, or check the box at the top to select all invoices listed.

3. Click **Copy.** All service items from the original invoice are copied to the selected invoices and appear in the **Invoices & Services** pane.

4. To remove items from an invoice not ordered by that client, check the box(es) of the service item(s), then click ⊖ at the top of the **Invoices & Services** pane.

5. In the popup that appears, click **Yes.** If there are additional service items to add to any invoice, see Adding or updating single service items.

6. When finished entering service items, add appearance only attorneys (see Adding appearance attorneys). Or if there were no appearance attorneys, click **Next** to save your changes and go to the next screen, Turn In > 4: Confirm & Finish, to review the billing sheet generated and submit the job. See Submitting billing sheets online.

Step-by-step instructions

- Entering service items from billing sets & standing orders
- Adding or updating single service items
- Adding appearance attorneys
- Submitting billing sheets online

Adding or updating single service items

If your office does not provide billing sets of service items or you have any service items that do not fit into the normal billing sets, add them manually.

Continued from Entering service items from billing sets & standing orders.

1. In Turn In > 3: Invoices, to enter service items one at a time, click ⏷ **> New Service** in the invoice's **Actions** column.

2. In the **New Service** panel, enter the following applicable information:

   - ***Service Item**
     Required. Select the service item in the drop-down.

   - ***Units**
     Required. Enter the number of units. The default is "1."

   - **Split %**
     If several parties are sharing the cost of this service item, enter the percentage allocated for this party (e.g., "50.000" for one half or "33.333" for one third).

   - **Remarks**
     Enter any comments concerning this service item.

3. Click **Save.** The service item appears in a pane under the witness name in the invoice.

4. Repeat for any other service items. When finished entering service items, add appearance only attorneys (see Adding appearance attorneys). Or if there were no appearance attorneys, click **Next** to save your changes and go to the next screen, Turn In > 4: Confirm & Finish, to review the billing sheet generated and submit the job. See Submitting billing sheets online.

TIP: Save time by copying services from one invoice to others

If you have multiple clients ordering the same services, you can quickly copy services from one client to others instead of adding services to each invoice individually. See Copying services to multiple invoices.

Step-by-step instructions

- Entering service items from billing sets & standing orders
- Adding appearance attorneys
- Submitting billing sheets online
- Copying services to multiple invoices

Submitting billing sheets online

When you have finished entering information and uploading files for a job in RB Connect, generate the billing sheet, save a copy for your files if desired, and send your finished report to the office.

Continued from Adding ordering parties, Entering service items from billing sets & standing orders, Adding or updating single service items, Copying services to multiple invoices, or Adding appearance attorneys.

1. In Turn In > 4: Confirm & Finish, review the billing sheet generated from your input. Click **Back** if you want to make any changes.

2. To keep a copy for your records, see Exporting & printing reports.

3. Click **Finish.** The office is notified of your turn-in immediately, and today's date appears in the job's **Turn-In Date** field.

Step-by-step instructions

- Adding ordering parties
- Entering service items from billing sets & standing orders
- Adding or updating single service items
- Copying services to multiple invoices
- Adding appearance attorneys
- Exporting & printing reports

Prefill

When you **prefill** an invoice, you automatically add related parties and/or service items, saving time and reducing the chance of incomplete invoices.

Sold To vs. Bill To

Sold To Firms and **Sold To Contacts** are parties that order a job and/or related services. **Bill To Firms** and **Bill To Contacts** are parties who will be responsible for paying invoices for the services ordered. **Sold To** and **Bill To** can be the same firm/contact on a job.

Step-by-step instructions

- Adding firms & contacts
- Adding ordering parties
- Adding appearance attorneys

Requesting file deletions

If you uploaded the wrong file or no longer want to include a file, you can request it be removed.

1. ## Access file(s)

   If you are not already in a Job window:

   - ### From the central repository

     To find files in **Repository,** see Searching repositories.

   - ### From a job

     In a Job window, scroll or jump to the **Repository** pane.

2. ## Request file deletion

   1. In the **Repository** pane, check the box(es) of file(s) to be deleted, then click **> Request to delete files.**

   2. In the **Request to delete files** panel that appears, the files you selected are listed. Enter your request explanation in ***Reason** *(required).*

   3. Click **Send.** The panel closes, and RB Connect notifies the office of your request.

Reference

- Job

Step-by-step instructions

- Searching repositories
- Turning in jobs online
- Viewing job details

Customizing PDF word lists

When exporting a Master Word List as a PDF, you can customize its appearance.

Continued from Compiling your own word lists.

1. In the **Create Master List > PDF** panel, select formatting options for the PDF:

   - **Margin**

     To change how far from the edge of the paper the word list appears, enter new numbers in the appropriate fields.

     Top – Default is 0.75 inches.

     Bottom – Default is 0.50 inches.

     Left – Default is 1.25 inches.

     Right – Default is 0.50 inches.

   - **Border**

     Top/Bottom/Left/Right – Default is Single line. You can choose None to remove the line or Double to multiply the line in any or all of the drop-downs.

     Thickness – Default is 0.50 points. For a thicker or thinner line, select a number in the drop-down.

   - **Font**

     Font Name – Default is Courier. To choose a different type face, select one in the drop-down.

     Font Size – Default is 12 points. To choose a different type size, select one in the drop-down.

   - **Others**

     Columns – Default is 4 columns per page. To have the words listed in more or fewer columns, choose a number in the drop-down.

     Word Count – Default is No. If you want to include a word count (the number of times each word appears in the transcripts) in the word list, choose Yes in the drop-down.

2. Click **Export.** The master word list is created and exported to your desktop.

Reference

- PDF

Step-by-step instructions

- Compiling your own word lists

Updating your contact information

You can update your profile at any time.

1. To update your contact information, click **[your name on the screen]** 🔽 **> My Profile.**

2. In the My Profile window, click **Edit.**

3. Update fields as needed:

- ***First Name**

  Required. Your given name.

- **Mi.**

  Your middle name or initial.

- ***Last Name**

  Required. Your family name.

- ***Full Name**

  Required. Instead of entering text here, enter your name in the other fields first, then select one of the full name variations from the drop-down next to this field.

- ***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.)

- **Salutation**

  Select your title, i.e., how you want to be addressed, in the drop-down.

- **Address**

  Street address only. City, state and zip code have their own fields/drop-downs.

- **City/State/Country/Zip**

  You do not need to enter the city or state. Enter the postal code (zip code) in **Zip,** then click the field's 🖼. The other address fields will be automatically populated.

- **Main Phone**

  The primary phone number you wish to be reached at.

- **Alt. Phone**

  Your secondary phone number, if any.

- **Mobile Phone**

  Your cell phone number.

- **Mobile Vendor**

  Your cell phone service provider.

- **Fax**

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

4. Click **Save.**

Step-by-step instructions

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

Using your dashboard

Personalize the look of your dashboard by rearranging the layout. Click hyperlinks in your dashboard to get more info, download files, and pay invoices.

- ## Access your dashboard

  - Your dashboard appears as your welcome screen every time you log into RB Connect.

  - You can access your dashboard within RB Connect by clicking **[your name] > Dashboard.**

- ## Personalize your dashboard

  You can rearrange your dashboard's layout and resize individual panes. See Arranging your dashboard.

- ## View upcoming jobs

  Top 10 Upcoming Jobs displays your next 10 scheduled jobs including basic information such as the date and your start time. For more information about:

  - **Individual job listed** – Click the hyperlinked job number and see Viewing job details.

  - **Other jobs/all jobs** – See Viewing your calendar.

- ## View overdue tasks

  Top 10 Overdue Tasks displays your 10 oldest outstanding tasks including basic information such as the due date and witness name. For more information about:

  - **Individual task listed** – Click the hyperlinked job number and see Viewing job details.

  - **Other task/all task**s – See Viewing your outstanding tasks.

- ## View outstanding invoices & next paycheck amounts

  Total Receivables displays the total amount outstanding due to you and the number of outstanding invoices. For more information about monies due to you see Viewing account activity.

Step-by-step instructions

- Arranging your dashboard
- Viewing job details
- Viewing your calendar
- Viewing your outstanding tasks
- Viewing account activity

Arranging your dashboard

Personalize the look of your dashboard by rearranging the layout and resizing individual panes.

- ## To change the width of a pane

  Click and drag the right side of the pane. When you release, the pane will snap to the currently visible right border line. Depending on how large or small you make a pane, the rest of the panes in the dashboard will automatically rearrange themselves.

- ## To change the height of a pane

  Move the cursor to the bottom of the pane. When the cursor transforms into a double-headed arrow, click and drag up or down to resize the pane vertically.

- ## To rearrange the order of the panes

  Click and drag a pane header to its desired location. If placement is allowed, an empty box will appear in the location that is the same size as the pane, and other panes will automatically rearrange themselves in response. When you release, the pane will align itself inside the box.

- ## To save your customized layout

  Click **Save Layout.** Then click **OK** in the popup that appears.

Step-by-step instructions

- [Using your dashboard](#)

Updating your login name

If you sign into RB Connect with a login name instead of your email address, you can change your login name at any time.

1. To update your login name, click **[your name on the screen]** ▼ **> Change Login Name.**

2. In the Change Login Name window, your current login name is displayed. To change your login name, enter a new one in ***New Login Name.**

3. Click **Save.**

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 **[your name on the screen]** 🔽 **> Change Password.**

   2. In the Change Password window, enter your password or select it from the drop-down in ***Current Password** *(required).*

2. ## Create a new password

   1. Enter your new password in both ***New Password** and ***Confirm New Password** *(required).*

   2. Click **Save.**

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 what your windows look like and what information your job request defaults are.

1. ## Set general preferences

   1. To set preferences, click **[Your name on the screen]** 🔽 **> Preferences.**

   2. In the **General** pane in the Preferences window:

      - ### Default row count for grid

        Select a default from the drop-down for how many rows to display in result grids. Higher row counts will cause results to take longer loading.

      - ### Use Dark Mode

        Default is No. Click to select Yes to set your RB Connect to reverse/light on dark mode.

2. ## Set calendar preferences

   In the **Jobs** pane:

   - ### Default View Style

     Choose how your calendar appears.

     - **Calendar** – Displays a month's worth of jobs at once in a calendar-page format, making it easy to see how many jobs you have scheduled for each day.

     - **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.

   - ### Maximum jobs per day in Calendar View

     Your monthly calendar displays as many settings per day as possible up to the number selected here.

     If there are more jobs scheduled for a day than the maximum set here, the day's space includes a note of the number of additional settings for the day, which are accessible by clicking the note.

   - ### Line Data for Calendar View

     In these 2 drop-downs, select which type of information you want to appear on the monthly calendar to identify jobs.

3. ## Save preferences

   To save your revised preferences, click **Save.**

Reference

- Results pane
- Jobs

Step-by-step instructions

- Viewing your calendar

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 **[your name on the screen]** ▼ **> Log Out.**

2. In the popup that appears, click **Yes.**

IMPORTANT: Save your work

If you do not finish something, such as a job turn-in, before logging out, be sure to save your work first. RB Connect does not automatically save your work for you.