RB Web 8 online office for attorneys, paralegals and secretaries

User Guide

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Program Basics

Logging in

Sign in to view your calendar, check account activity, download transcripts and make job requests. RB Web is password-protected. To access RB Web, you must use your user ID and password. If you do not have a user ID and password, or have forgotten them, contact us before attempting to sign in.

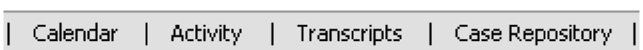
1. In the Log-In screen, enter your assigned user ID and password.

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

Program Basics

Navigating the site

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



NOTE

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

Program Basics

Exiting the site

Whenever you are logged in and have not clicked anything for 20 minutes, you are automatically disconnected from the site. Instead of letting your time expire, log out when you have finished by either:

- Clicking **Log Off** in the navigation bar to return to the Log-In screen, or

- Closing your browser window.

Calendar

Viewing your real-time calendar

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

1. Click **Calendar** in the navigation bar.

2. In the Calendar screen, your scheduled jobs for the current month appear. You can choose a **View Style** in the drop-down:

   - **Calendar** – To see scheduled jobs a month at a time.
   - **List** – To see jobs in a list format.

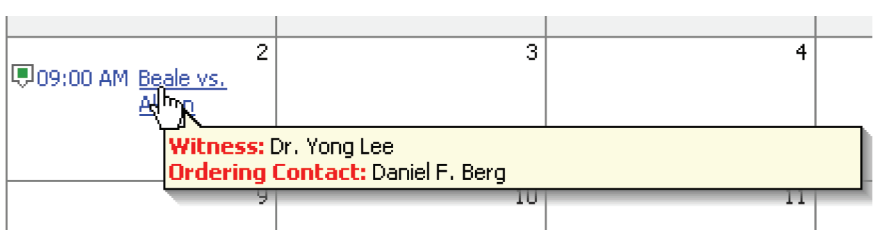
3. Limit the jobs shown by selecting one or more search filters in the **Search Criteria** pane:

   - **Job Date** (List View only)– To find jobs for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Case** – To find jobs for a specific case, enter part of the case name into the field.
   - **Witness** – To find jobs for a specific witness, enter part of a witness's name in the field.
   - **Ordering Contact** – To find jobs for a specific attorney, select one in the drop-down list. The default is ALL.
   - **Exclude Billed Jobs** – To see billed jobs also, select No in the drop-down. The default is Yes.
   - **Exclude Cancelled Jobs** – To exclude cancelled jobs, select Yes in the drop-down. The default is No.

4. Click **Search.**

5. If viewing in Calendar format, you can see the next month by clicking the right arrow button. View the previous month by clicking the left arrow button. Click the double arrow buttons to move the calendar one year at a time.

6. In Calendar format, pause the cursor over a case name to see its witness and attorney.



TIP

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

Calendar

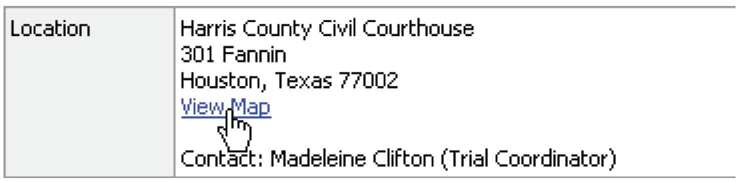
Viewing scheduled jobs' details

Review individual scheduled jobs in detail including driving directions by *MapQuest.*

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

2. In the Calendar Detail screen, the information for the job you clicked appears.

3. In the Location section, click **View Map** (highlighted in blue) to see *MapQuest* directions.



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

Calendar

Entering new job requests from scratch

If you are starting a new case, use the Request New Job form to make a job request. Quickly add details by filling in blanks, making selections in drop-downs and checking off boxes. Any selections not relevant to your request can be left blank. You will receive an instant email acknowledgement when you send in your request. If you are making a job request on a continuing case, see “Creating new requests from old jobs.”

1. In the Calendar screen, click **Request New Job.**

2. Under Job Information, enter the following applicable information:

   - **Job Date** – Click the calendar button and select a date in the Date Navigator. If this job is for multiple days, see “Creating recurring jobs.”
   - **Time** – Select a start time and an estimated end time in the drop-down.
   - **Job Type** – Select a job type in the drop-down.
   - **Case No.** – Enter the court-assigned case (cause) number.
   - **Case Name** – Enter the brief caption (e.g., Smith vs. Big Company).
   - **Witness** – Enter the witness’s name. You can enter more than one witness here. If you need more space than 80 characters, use the **Remarks** field below.
   - **Expert Type** – If the witness is an expert, select an expertise in the drop-down.
   - **Subpoenaed Witness** – If the witness has been subpoenaed, click the checkbox.
   - **Specialties** – Click the look-up button. In the Specialties window, click a blank checkbox to add a specialty. Click a marked checkbox to remove a specialty.
   - **Remarks** – Enter any additional requests, such as for a specific reporter or special equipment.

3. Under Location Information, click the **Same Location as Ordering** checkbox if the job is going to be at your office. Otherwise, enter the location name, address and contact information.

4. Under Ordering Information, enter the following applicable information:

   - **Contact** – If needed, select a different contact in the drop-down.
   - **Ordered By** – Enter your full name.
   - **Request Services** – Click the look-up button. In the Services window, click a blank checkbox to add a service. Click a marked checkbox to remove a service.

5. Under Billing Information, click the **Same as Ordering** checkbox if your office will be billed. Otherwise, enter the following applicable information:

   - **Direct Billing Notes** – Enter the name and complete billing address of the third party to be billed, such as an insurance company.
   - **Client Matter No.** – Enter your reference or file number.
   - **Claim No.** – Enter the insurance claim number.
   - **Name of Insured** – Enter the name of the insured.
   - **Date of Loss** – Enter the date of loss (accident), or click the calendar button next to the field and select a date in the Date Navigator.

6. Under Attachments, click **Browse** to select a file (such as notice) to send with the request if desired. You can attach up to three files to each job request.

7. Click **Save.** You will receive an instant email acknowledgement of your request. Or click **Cancel** to return to the Calendar screen without saving your request.

Calendar

Creating recurring jobs

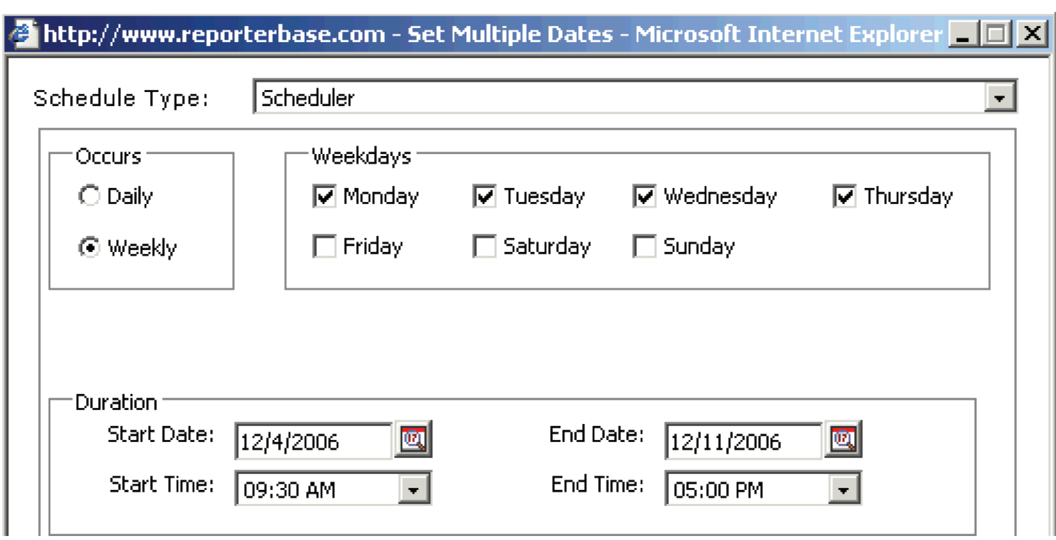
If you have a series of similar jobs occurring over a range of days, such as trials, save time by using the Create Jobs wizard.

1. In the New Job screen under Job Information, next to **Job Date,** click **Set Multiple Dates.**

2. Click the look-up button next to the **Job Date** field.

3. In the Set Multiple Dates window, enter the following information:

   - **Schedule Type** – Select Fixed Dates in the drop-down to enter job dates manually one at a time. Otherwise, leave Scheduler as the default.
   - **Occurs** – Select Daily to create jobs for every day including Saturday and Sunday. Select Weekly to select the days of the week.
   - **Weekdays** – Select the days of the week.
   - **Duration** – Enter the start date, end date, start time and end time.



4. Click **OK.**

5. Continue with the rest of Step 2 in “Entering new job requests from scratch.”

Calendar

Creating new requests from old jobs

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

1. In the Calendar screen, search for a previous job, then click its job number or case name (highlighted in blue) to display details.

2. In the Calendar Detail screen, click **Copy & New** (at the bottom of the screen).

3. Every field is copied from the selected job except **Job Date, Time** and **Witness.** Enter a new job date, time and witness. Make any other changes to reflect your new request.

4. Click **Save.** You will receive an instant email acknowledgement of your request. Or click **Cancel** to return to the Calendar screen without saving your request.

Calendar

Changing job requests

Until our office acknowledges your request by changing its status from "*Request New*" to "*In Progress*," you can make any necessary changes, except the job date. You cannot change the job date by editing the request. To change the job date, you must cancel the request and copy it as a new request. (See "Canceling online job requests.") If we have already changed a request's status to "In Progress" and you need to revise it, please contact our office.

1. In the Calendar screen, search for a previous request, then click its job number or case name (highlighted in blue) to display details.

2. In the Calendar Detail screen, make any necessary changes, then click **Save.** Or click **Cancel** to return to the Calendar screen without saving your request.

Calendar

Canceling online job requests

If a job is cancelled, send us a cancel request. If a job is being rescheduled, you must cancel the existing job first, then copy it as a new request. (See "Creating new requests from old jobs.")

1. In the Calendar screen, search for the job you want to cancel. Click its job number or case name (highlighted in blue) to display details.

2. In the Calendar Detail screen, click **Request Cancel** (at the bottom of the screen).

Activity

Viewing account activity

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

1. Click **Activity** in the navigation bar.

2. In the Activity screen, your current invoices (billed during the last 10 days) appear, sorted by invoice number. Search for invoices by selecting one or more search filters in the **Search Criteria** pane:

   - **Invoice Date** – To see invoices for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Client Matter No.** – To see invoices for a specific client matter number, enter the client matter number in the field.
   - **Case** – To see invoices for a specific case, enter part of the case name into the field.
   - **Job Date** – To see invoices for specific job dates, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Contact** – To find invoices for a specific attorney, select one in the drop-down list.

3. Click **Search.**

4. All potential matches to the information you entered appear. To change the order of the invoices, click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order.

5. Click an invoice number (highlighted in blue) for more details.

6. In the Invoice Detail screen, if you see the **Files** section, you can view or download the <u>original</u> invoice by clicking the download (arrow) button.

7. Click **Back** (located at the bottom of the screen) to return to the Activity screen.

Transcripts

Downloading transcripts

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

1. Click **Transcripts** in the navigation bar.

2. In the Transcripts screen, any available transcripts for jobs taken in the past month appear. Search for transcripts by selecting one or more search filters in the **Search Criteria** pane:

   - **Uploaded Date** – To see transcripts for different time periods, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Case** – To find transcripts on a specific case, enter part of the case name into the field.
   - **Witness** – To find a specific witness, enter part of the witness’s name in the field.
   - **Job Date** – To find transcripts for a specific job date range, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.
   - **Contact** – To find transcripts for a specific attorney, select one in the drop-down list.

3. Click **Search.**

4. All potential matches to the information you entered appear. Click the plus (+) sign in front of the witness name to see the associated files available for download.

	Witness	Job Date
+	Dr. Yong Lee	11/27/2006
+	William H. Gates	11/27/2006

5. Click the download (arrow) button next to the file you want to download.

TIP

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

Case Repository

Reviewing case-wide documents

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

1. Click **Case Repository** in the navigation bar.

2. In the Case Repository screen, search for a case by selecting one or more search filters in the **Search Criteria** pane:

   - **Case Name** – Enter part of the case name into the field.
   - **Case No.** – Enter part of the case (cause) number.
   - **Contact** – Select an attorney in the drop-down list.

3. Click **Search.** All potential matches to the information you entered appear. Click the case name to see all of the associated files for the case.

4. In the Files screen, search for a file by selecting one or more search filters in the **Search Criteria** pane:

   - **File Type** – Select a file type in the drop-down list.
   - **File Description** – Enter part of the description.
   - **Uploaded Date** – To find files uploaded for a specific period, enter new beginning and end dates, or click the attached calendar buttons and select dates in the pop-up Date Navigators.

5. Click **Search.**

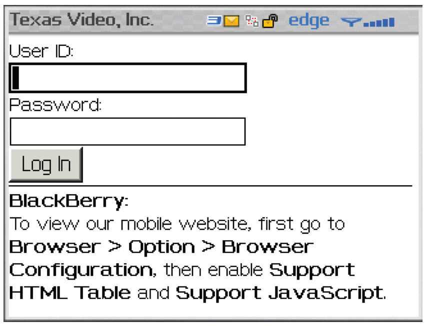
6. Click the download (arrow) button next to the file you want to view or download.

RB Web Mobile

Accessing your calendar on a wireless device

You can view all of your requested jobs, their current status and individual job details by connecting to your regular RB Web URL address over a *BlackBerry,* PDA, or web-enabled cell phone. RB Web automatically detects the device and displays your information correctly. If you are on route to a deposition or other proceeding and need directions, you can get *MapQuest* directions with a single click.

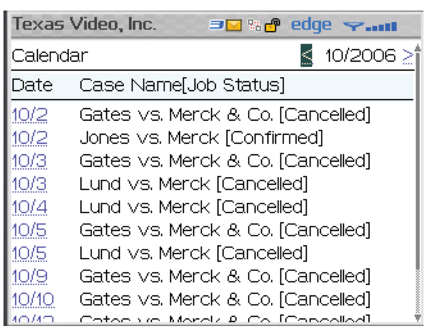
1. After entering RB Web's URL into your wireless device, the Log-in page appears. Enter your user ID and password, then click **Log In.**

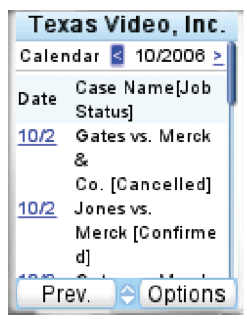


BlackBerry Log-in

Cell Phone Log-in

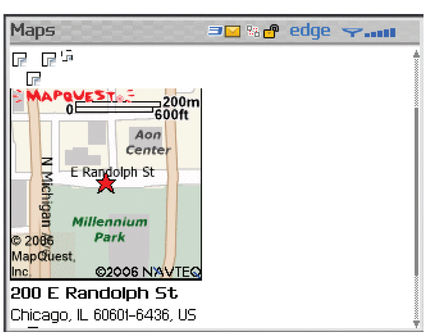
2. After logging in, click **Calendar** to display all of your requested jobs for the current month. Navigate to other months by clicking the arrows at the top right of your screen.





3. Click an underlined date to view its job information.

4. In the Job Information screen, click **View Map** to go to *MapQuest* and get directions to location.

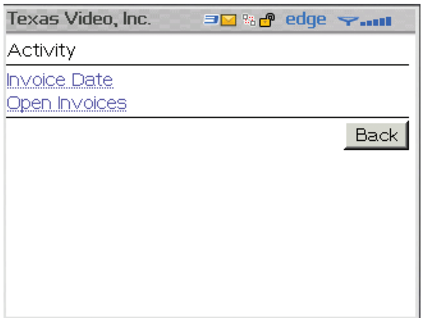


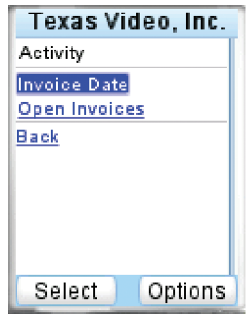
RB Web Mobile

Viewing your account on a wireless device

You can look up billed amounts and outstanding balances of current and past invoices by connecting to your RB Web via a *BlackBerry,* PDA, or web-enabled cell phone.

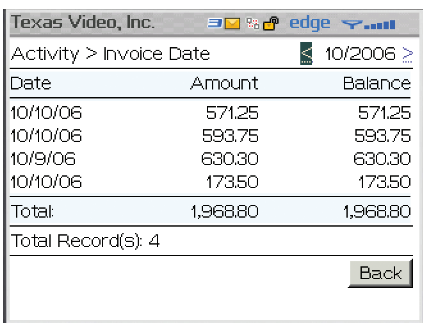
1. After logging into your regular RB Web URL on your wireless device, click **Activity.** Links for **Invoice Date** and **Open Invoices** appear.

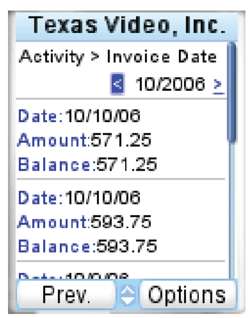




BlackBerry Activity screen **Cell Phone Activity screen**

2. On the Activity screen, click **Invoice Date** to see all of your invoices for the current month. Navigate to other months by clicking the arrows at the top right of your screen.





3. On the Activity screen click **Open Invoices** to view all of your open invoices with their balances.