RB Connect User Guide
for attorneys, paralegals, and secretaries
version 9.52

RB Connect User Guide

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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.**

Calendar

Request depos and other jobs, manage scheduled jobs, and upload files. View your calendar a month at a time in a calendar-page format or as a list for any date range.

Reference

- Job

Step-by-step instructions

- Viewing your calendar
- Requesting jobs

Order Transcript

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

Step-by-step instructions

- Requesting transcripts after the depo

Account Activity

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

Step-by-step instructions

- Viewing account activity
- Viewing invoice details
- Paying invoices online

Transcript Packages

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

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

Step-by-step instructions

- Viewing transcripts online

Repository

Repositories are where downloadable files are stored.

Step-by-step instructions

- Using repositories
- Searching repositories
- Downloading & viewing files

Reward Points

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

Step-by-step instructions

- Viewing reward points
- Redeeming reward points
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Support Tickets

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

Step-by-step instructions

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

Viewing your calendar

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

1. ## Set search criteria

   1. To see your scheduled depos and other jobs, click:

      - **Calendar** in the main menu.

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

   2. If viewing as calendar pages, the current month of jobs scheduled by all contacts at your firm 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:

      - **Contact**

        Default is ALL. To limit calendar to your jobs, click 🖼 then click your hyperlinked name in the **Lookup Contact** panel to select it.

      - **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. Default view is the current month.

        - **List** – Displays your calendar in a results grid. List view shows the most information about jobs in the results, plus it has the most search criteria so you can narrow results further.

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

        List View only
        Default is from today to 10 days in the future. Change date range, if desired (see Date Navigator).

      - **Job No.**

        List View only
        Enter the entire job number.

      - **Case**

        Enter part of a case's name.

      - **Witness**

        Enter part of a deponent's name.

2. ## View results

   1. Click 🔍. All jobs that fit the search criteria appear in the results pane/monthly calendar. Canceled jobs appear in red in List view, and in red and crossed-out in Calendar view. If viewing as Calendar pages, see Viewing monthly calendars.

   2. Click a hyperlinked job to:

      - View details.

- Reschedule the job.

- Upload files.

- Update its information.

- Confirm the job.

- Cancel the job.

3. To request a new job, see Requesting jobs.

Reference

- Job
- Dashboard
- Preferences
- Date Navigator

Step-by-step instructions

- Setting preferences
- Viewing monthly calendars
- Viewing job details
- Rescheduling jobs
- Uploading files
- Changing job requests
- Requesting job confirmations
- Canceling jobs
- Requesting jobs

Requesting jobs

You can set up a job with only the job date and time. Or submit a request with additional information, such as witness, case, job location, and bill to client. You can also upload related files.

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

1. **Start a new request**

   1. To make a new request, click **Calendar.**

   2. Click **Request New.** The Calendar > Request New Job window opens.

2. **Enter required job info**

   1. In the Calendar > Request New Job's **General** pane:

      - ***Job Date**

        Required.

        - **If this is a single job,** enter the date the job will take place in the field or click 🗓 to select date in Date Navigator.

        - **If this is a job with multiple dates,** see Creating recurring jobs.

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

        Required. Select times in pop-up lists.

   2. Scroll or jump to the **Ordering Firm** pane.

   3. **Ordering Firm** and **Scheduled By** are not editable. You can update:

      - ***Ordering Contact**

        Required. If you are not the person requesting the job, click 🖼. Then click the correct hyperlinked name in the **Lookup Contact** panel to select it.

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

   You can enter other job information, if desired. Scroll or jump to each pane:

   - **General**

     To enter basic job information, such as the witness, case, and job type, see Entering general job information.

   - **Job Location**

     To designate the job's location, see Entering job locations.

   - **Billing Information**

     - **Bill To Contact is the same as Ordering Contact** – Select Yes if you are responsible for the job's invoice.

     - **Direct Billing Notes** – Use this field if your firm is not the billing party. Any text entered here appears on the invoice along with Claim No., Name of Insured, and Date of Loss.

- **Client Matter No.** – This number, which consists of a number designating the client combined with a number designating the case, will be printed on the invoice. This number is required for electronic billing.

- **Claim No.** – If this job is part of an insurance case, enter the insurance claim number.

- **Files**

  To send files along with the job request, see Uploading files.

NOTE: Additional information pane

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

4. **Send job request**

   Click **Save.** Your request is sent automatically.

   If you made any errors or have additional information, you can update the request's information as long as its **Job Status** in the Calendar window is Request New. If the job status has changed and you need to make changes to the request, see Changing job requests.

   If you need to reschedule a job, see Rescheduling jobs.

   You can send additional files anytime, see Uploading files.

Reference

- Job
- Date Navigator

Step-by-step instructions

- Creating recurring jobs
- Entering general job information
- Entering job locations
- Uploading files
- Viewing your calendar
- Changing job requests
- Rescheduling jobs

Requesting transcripts after the depo

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

1. To back order a transcript, click **Order Transcript.**

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

   - ### Contact
     Default is ALL. To find transcripts for a specific person at your firm, click ▣. Then click a hyperlinked name in the **Lookup Contact** panel to select it.

   - ### Job No.
     To see transcript(s) for a specific job, enter its job number in the field.

   - ### Jobe Date From/Job Date To
     To see transcript(s) for jobs within a specific date range, see Date Navigator.

   - ### Case
     To see transcript(s) for a specific case, enter part of the case name into the field.

   - ### Witness
     To see transcript(s) for a specific witness, enter part of a deponent's name.

3. Click ⌕.

4. All billed jobs that fit your search criteria appear. Click **Request Order** next to the job you want a transcript for.

5. In the Order Transcript > Request Order window, if you have the option, enter information about your request.

6. Click **Submit.** Your request is automatically sent to our office, and in the Order Transcript screen, the **Request Order** button for the job you selected is removed.

7. You will receive an email to confirm that we have received and are processing your request.

NOTE: You cannot cancel a request online

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

Viewing account activity

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

1. To see and pay invoices, click:

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

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

2. In the Account Activity window, any invoices with outstanding balances are listed chronologically, oldest first.

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

   - **Contact**

     Default is ALL. To find invoices for a specific person, click ▦. Then click a hyperlinked name in the **Lookup Contact** panel to select it.

   - **Account Status**

     Select an option in the drop-down:

     - **ALL** – To view both outstanding and paid invoices.

     - **Show Open Invoices Only** – Default. To view only outstanding invoices.

     - **Show Paid Invoices Only** – To view only paid invoices.

   - **Date Type**

     Select an option in the drop-down:

     - **Invoice Date** – Default. To see invoices by billed dates.

     - **Job Date** – To see invoices by scheduled job dates.

   - **Date From/Date To**

     Enter dates in these fields or click 📅 to select dates in the Date Navigator.

   - **Invoice No.**

     To see a specific invoice, enter its invoice number in the field.

   - **Job No.**

     To see the invoice for a specific job, enter its job number in the field.

   - **Case**

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

   - **Client Matter No.**

     To see invoices for a specific client matter number, enter the client matter number in the field.

4. Click 🔍.

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 or download its PDF version, see [Viewing invoice details](#).

- Pay an invoice, see [Paying invoices](#).

Reference

- [Dashboard](#)
- [Date Navigator](#)

Step-by-step instructions

- [Exporting & printing results](#)
- [Viewing invoice details](#)
- [Paying invoices online](#)

Viewing invoice details

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

1. To find an invoice, see Viewing account activity.

2. Click an invoice's hyperlinked invoice number to view information about the invoice or download its PDF version.

3. In the Account Activity > Invoice window, no fields are editable. You can view details, export results, download files, and pay the invoice. Scroll or jump to:

   - **Job**

     To see the invoice's related job number & date, status, case name & number, and ordering firm/contact.

   - **Invoice**

     To see the invoice's number, date, amount, current balance, late charges, finance charges, surcharges, paid date, sold to firm/contact, bill to firm/contact, name of insured, insurance claim number, client matter number, date of loss, reference number, and transcript information (witness name, page & volume information, and resource on the job).

   - **Payment History**

     To see any payments already credited to the invoice.

   - **Repository**

     To download the invoice PDFs. Check a file's box, then click .

4. To pay the invoice, see Paying invoices online.

5. To export and/or print the results in a pane, see Exporting & printing results.

Step-by-step instructions

- Viewing account activity
- Paying invoices online
- Exporting & printing results

Paying invoices online

Pay invoices (including COD invoices) online using credit cards.

1. To find an invoice or invoices to pay, see Viewing account activity.

2. In the Account Activity window's results pane, either:

   - Check the box next to each invoice you want to pay. Or check the **Pay** box at the top to select all of the listed invoices. Then click **Pay Invoice(s).**

   - Click the hyperlinked Invoice No. of an invoice you want to pay, then click **Pay Invoice** in the Account Activity > Invoice window.

3. In the **Credit Card Information** pane, enter your credit card details:

   - ***Card Type**

     Required. Select your credit card's category from the drop-down.

   - ***Card Number**

     Required. Enter the number issued to your credit card.

   - ***Expiration Date (month/year)**

     Required. Select the 2-digit month and the 4-digit year your card will expire in the drop-downs.

   - ***CVV**

     Required. Enter your credit card's 3- or 4-digit Card Verification Value code.

4. In the **Billing Information** pane, Click the **Same as my profile** slider to select Yes to have the fields filled with the information from your **My Profile** page (see Updating your contact information).

5. Edit the **Billing Information** fields, if necessary, to match your personal information on your credit card account:

   - ***First Name**

     Required. Your given name.

   - ***Last Name**

     Required. Your family name.

   - ***Email**

     Required. Your email address

   - ***Address**

     Required. Street address only of your credit card billing address. City, state and zip code have their own fields/drop-downs. 2nd line is optional.

   - ***City**

     Required. City of your credit card billing address.

   - ***State**

     Required. Abbreviation of the state of your credit card billing address. Select from the drop-down.

   - ***Zip**

     Required. Postal code of your credit card billing address.

6. In the **Invoices to pay** pane, you can check that you have selected the correct invoice(s) you wish to pay.

7. Click **Pay.**

Step-by-step instructions

- [Viewing account activity](#)

Viewing transcripts online

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

1. ## Find your transcripts

   1. **Connect > Transcript Packages**

   2. In Transcript Package's **Search By** pane, to find your transcript packages, click the **Contact** field's ▣. Then click your hyperlinked name in the **Lookup Contact** panel to select it.

   3. Click [🔍]. All of your transcript packages appear in the grid. If you want to refine your search, see Finding transcript packages.

2. ## View a transcript

   1. Click a transcript package's hyperlinked **File Name** in the search results.

   2. The transcript appears in the Transcript Packages window. You can move through the transcript in several ways:

      - Click the [◄] and [►] arrows to move page by page through the document.

      - Click the [◄◄] and [►►] arrows to jump to the beginning or end of the document.

      - Click **Search.** See Searching transcripts.

      - Click **Go To,** then enter a page number in the pop-up **Page No.** field and click [►]. The transcript will automatically advance to the page specified.

3. ## Work with the transcript

   1. If the transcript has attached exhibits, videos or other files, they will be listed in designated panes in the Transcript Packages window. To view files, check their boxes, then click [⬇] to download to your device for viewing.

   2. To highlight lines in the transcript see Highlighting transcript packages.

   3. To make notes on the transcript and attached files see Making notes in transcript packages.

   4. To export different versions of the transcript, including condensed, word list, and highlights/notes to your device, see Exporting transcripts.

   5. To view transcript details, such as the reporter's name, click **More > Properties.** The **Properties** panel appears with current information about the transcript in a read-only format.

   6. When finished, click **Close** in the **Properties** panel.

Step-by-step instructions

- Finding transcript packages

- [Searching transcripts](#)
- [Highlighting transcript packages](#)
- [Making notes in transcript packages](#)
- [Exporting transcripts](#)

Using repositories

Search for files in a repository. Download files for viewing, archiving, or emailing.

- ## 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.

Step-by-step instructions

- Searching repositories
- Downloading & viewing files

Searching repositories

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

1. To find your files, click:

   - **Repository** in the main menu.

   - **More >** in the **Top 10 Jobs with Recently Uploaded Files** header in the Dashboard.

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

   - ## Repository Type

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

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

   - ## Contact

     Case Repository only

     Default is ALL. To limit files to one contact, click 🖼 then click the hyperlinked name in the Lookup panel to select it.

   - ## Case Name

     Case Repository only

     Enter part of the name of the case.

   - ## Case No.

     Case Repository only

     Number of the case.

   - ## Job No.

     Case Repository only

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

   - ## Witness

     Case Repository only

     Enter part of the witness name.

   - ## File Type

     Case Repository only

     Default is ALL. Click 🖼 to select specific type(s) to search. See Lookup panel.

   - ## File Name

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

   - ## Word Search Type

     Case Repository only, may not be available

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

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

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

- **Words to search for**

  Case Repository only, may not be available

  Enter text you want to find. Minimum number of characters for a search is 3, and minimum number of characters in a word to be searched is 2.

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

  Case Repository only

  Enter dates for the time period of a scheduled job for which you want to find associated file(s) in these fields or click 🗓 to select dates in the [Date Navigator](#).

  Upload Date From/Upload Date To

  Case Repository only

  Enter dates when the file was uploaded to the repository in these fields or click 🗓 to select dates in the [Date Navigator](#).

3. Click 🔍. All files that fit the search criteria are listed.

   - If you searched for a word or phrase, the result shows the first paragraph in any text-searchable files where the search word/phrase appears.

   - To save/view files, see [Downloading & viewing files](#).

NOTE: Not all files are text-searchable

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

Reference

- [Dashboard](#)
- [Lookup panel](#)
- [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 your dashboard

     Click a hyperlinked job number in the **Top 10 Jobs with Recently Uploaded Files.**

   - ### 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.** If the **Select Invoice to Pay** popup appears, you must pay the invoice first before you can download the file. Click **Next** in the popup and follow the instructions in Paying invoices online.

      - **In a job,** click in the **Repository** pane header. Then follow your browser's download instructions.

   2. The file downloads and is saved on your device based on your browser preferences. Depending on your browser, the file might also automatically open in the program on your device associated with each file's file type. Otherwise, locate the file 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

- Job

Step-by-step instructions

- Searching repositories
- Paying invoices online

Viewing reward points

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

1. To view your points, click **Reward Points.**

2. In the Reward Points window, **Current Points Statement** provides an overview of your points. You can quickly check:

   - **Current Balance**

     Your currently redeemable points, which are calculated from paid invoice amounts minus any already redeemed or transferred points.

   - **Pending Points**

     Points of all posted invoices that haven't been paid yet. When an invoice is paid, points earned on that invoice are automatically moved from **Pending Points** to **Current Balance** and are redeemable.

   - **Points Earned**

     Amount displayed includes all redeemable points earned since account was opened, including those already redeemed or transferred.

   - **Points Spent**

     Amount shown is all redeemed and transferred points since account was opened.

3. The list beneath **Current Points Statement** defaults to all activity in the last month. To view different activity, make selections in the **Search By** pane:

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

     Required. Defaults to the past 30 days. To view a different time period enter or select dates in the Date Navigator.

   - **Activity Type**

     Default is ALL. To view specific types of point activity, click 🖾. Then uncheck the **Activity Type** box in the **Lookup Activity Type** panel to clear all selections and check individual box(es) to select specific activity type(s):

     - **Earn** – Points accrued through services ordered and paid for.

     - **Adjustment** – Points added or subtracted by an administrator.

     - **Transfer** – Points gifted to or from another person (see Transferring reward points).

     - **Redeem** – Points you have applied to rewards (see Redeeming reward points).

4. Click 🔍. The list shows all points activity that matches your search criteria in chronological order, oldest transaction first. You can re-arrange the order by clicking any of the headers:

   - **Activity Type** – Categories of point transactions.

   - **Activity Date** – Dates transactions occurred.

   - **Invoice No.** – The numbers of invoices that earned points.

   - **Points** – Number of points involved in each transaction. Redemptions and transfers to other people are listed as negative numbers.

- **Status** – Pending displays until transaction is completed. Completed appears for any transfers you made, or when other transactions have been finished.

- **Remarks** – Redeemed point transactions display any information entered in the **Remarks** field when making the request (see Redeeming reward points). Transferred point transactions display whether points were given to or received from a particular party's name (see Transferring reward points).

5. To redeem points, see Redeeming reward points.

6. To transfer points, see Transferring reward points.

Reference

- Date Navigator

Step-by-step instructions

- Redeeming reward points
- Transferring reward points

Redeeming reward points

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

1. If not already in the Reward Points window, click **Reward Points.**

2. To redeem your outstanding points, click **Request Redeem.**

3. The **Current Points Statement** pane appears at the top of the Reward Points > Request Redeem window for your reference. You can request points redemption up to the total displayed under **Current Points.**

4. In the **Request Redeem** pane,

   - ***Redeem Method**
     Required. Choose a redemption type in the drop-down, such as Cash or Gift Certificate.

   - ***Points to Redeem**
     Required. Enter the number of points you want to redeem.

   - **Deliver To**

     Select the address in the drop-down you want your reward sent to.

     - **Use the firm address** – Default. Your company address as listed in your profile.

     - **Use the home address** – Your personal address in our records.

     - **Manually type the delivery address in Remarks** – Select this option to send your reward to a different address.

   - **Remarks**

     Enter any special instructions in regards to this request in this field, plus the delivery address if you selected in the **Deliver To** drop-down:

     - **Use the home address,** and you are not sure we have your correct address.

     - **Manually type the delivery address in Remarks.**

5. Click **Save.** Your request is sent to our office, the Reward Points > Request Redeem window closes, points requested are deducted from your **Current Points** total, and your request is listed in the activity grid below the **Current Points Statement** in the Reward Points window.

Step-by-step instructions

- Viewing reward points

Transferring reward points

Transfer points to other people in your firm.

1. If not already in the Reward Points window, click **Reward Points.**

2. To redeem your outstanding points, click **Transfer Points.**

3. The **Current Points Statement** pane appears at the top of the Reward Points > Transfer Points window for your reference. You can request point transfers up to the total displayed under **Current Points.**

4. In the **Transfer Points** pane:

   - ***Transfer To**
   Required. Choose the person you want to gift points to in the drop-down.

   - ***Points to Transfer**
   Required. Enter the number of points you want to give to the person.

5. Click **Save.** The Reward Points > Transfer Points window closes, points transferred are deducted from your **Current Points** total, and the transfer is listed as completed in the activity grid below the **Current Points Statement** in the Reward Points window.

Step-by-step instructions

- Viewing reward points

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 ![search icon]. 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 transcript notes or the body of messages. Add images, tables, and hyperlinks to messages.

Continued from Making notes in transcript packages, Asking for help & other information and Replying to support ticket reponses.

- ## Customize appearance

  In the **New Note** panel (Transcript Packages) or the ***Problem/Question** pane (Support Tickets), select text to be customized, then:

  - **Bold**

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

  - **Italic**

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

  - **Underline**

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

  - **Align Text Left**

    Support tickets only

    Have selected text line up on left margin only.

  - **Center Text**

    Support tickets only

    Have selected text align to a midpoint.

  - **Align Text Right**

    Support tickets only

    Have selected text line up on right margin only.

  - **Justify Text**

    Support tickets only

    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.)

- **Select Font Family**

  Support tickets only

  Scroll up or down the list of fonts and typefaces to select a different font for the selected text.

- **Select Font Size**

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

- **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 and the entire word will be bolded.

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

- ## Insert content

  Support tickets only

  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.**

Reference

- Transcript Packages

Step-by-step instructions

- Making notes in transcript packages
- Replying to support ticket reponses

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:

- Your top upcoming scheduled jobs with us
- Uploaded files from recent jobs
- Outstanding payables

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

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 Payables** header opens the Account Activity window where you can look up and pay invoices.

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 request, 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 2 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.

- ## Calendar

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

- ## Order Transcript

  Request transcripts on jobs you were already billed for.

- ## Account Activity

  View and pay invoices.

- ## Transcript Packages

  Work on transcripts online.

- ## Repository

  Download files.

- ## Support Tickets

  Get help and maintain a paper trail of the process.

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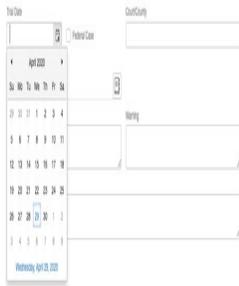
NOTE: Required fields
Fields and options that include ***** in their labels require an entry/selection before you can save your work.

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.
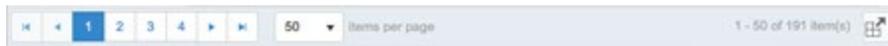
  - ### Arrow keys

    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.
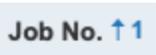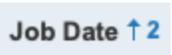
- **Ascending/descending sort order**

  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 ⊞ or ⊞ in lower right corner can be exported as an *Excel* file by clicking the icon and selecting **Export to Excel.** Some grids will also have the option, **Export to CSV,** which will export the grid as a CSV (Comma-Separated Values) file.

- ## To print results

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

- ## To save results

  Each time you click ⊞ or ⊞ 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.

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.
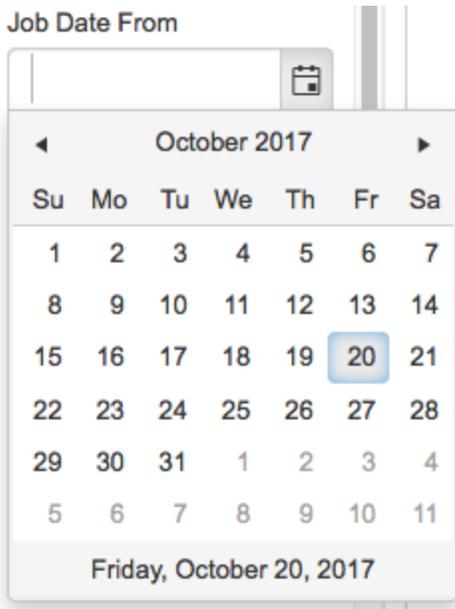
Reference

- 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.
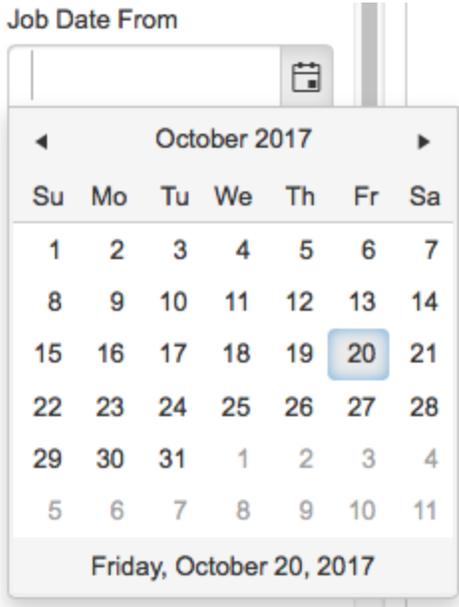
- ## Select another date

   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 scheduled 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, upload/download files, update information, request confirmation, cancel or reschedule the job, or copy the job to create new job(s). 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 job details

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

1. Continue from Viewing your calendar, Viewing monthly calendars, or Using your dashboard.

2. After clicking into a job from your job calendar or dashboard, you can view information about the job but not edit it.

3. In the top bar of the window, you can:

   - **Add the job to your calendar app.** Click **Add to Calendar >** [your calendar app: Google, Outlook, Calendar, or Yahoo]. Follow your browser/calendar app's instruction for saving the job in the app.

   - **Copy it to create a new job.** Instead of starting jobs from scratch each time, copy job information into a new job, then update it. Click **Copy & New.** The current job closes and all of the job information copies to a new **Request New Job** page except the job date and times. See Requesting jobs for information on filling these fields and submitting your request.

   - **Reschedule the job.** If the job date has changed, see Rescheduling jobs.

   - **Update the job information.** If other aspects of the job have changed, you can either edit the job (if its **Status** is "Request New") or submit your changes for our staff to update it. See Changing job requests.

   - **Request job confirmation.** If you want to check that your job request was received by our office, click **More > Request Confirm.** The job's **Status** changes to "Request Confirm," and our office receives your request.

   - **Cancel the job.** See Canceling jobs.

4. In the **General** pane, view basic information:

   - **Job No.**

     Our reference number for the job.

   - **Job Date**

     Requested/scheduled date for the job.

   - **Status**

     Current phase job is in.

   - **Start Time/End Time**

     Job's scheduled time range.

   - **Adjust clock for daylight saving changes**

     If Yes is selected, communications will adjust if necessary to have the correct time.

   - **Time Zone**

     Job's time zone.

   - **Job Type**

     Category of job requested.

   - **Witness**

     Witness's name(s).

- **Subpoenaed Witness**

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

- **Expert Type**

  If applicable, the witness's expertise.

- **Specialties**

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

- **Case**

  If applicable, the case name.

- **Case No.**

  If applicable, the case number.

- **Confirmation Notes**

  Any additional job request information not included elsewhere on the form.

5. Scroll or jump to **Ordering Firm** pane to see basic contact information we have for the job:

- **Ordering Firm**

  Name of the firm responsible for ordering the job.

- **Ordering Contact**

  Name of the ordering contact.

- **Phone**

  Ordering firm's main number.

- **Fax**

  Ordering firm's facsimile number.

- **Scheduled By**

  Name of contact who requested job with us.

6. Scroll or jump to **Job Location** pane to see where job will take place and get directions:

- **Location**

  Name of location for job.

- **Address**

  Street address of job location.

- **City**

  Job location's city.

- **State**

  Job location's state.

- **Zip**

  Job location's postal code.

- **Phone**

  Job location's main phone number.

- **Directions**

  Our instructions for getting to job location.

- **Location Notes**

  Any other information you need to know about the job location.

7. 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

8. Scroll or jump to **Billing Information** pane to review basic billing information:

   - **Bill To Firm**

     Company that will pay the invoice for the job.

   - **Bill To Contact**

     Person at **Bill To Firm** responsible for handling the job's invoice.

   - **Claim No.**

     If this job is part of an insurance case, the insurance claim number.

9. Scroll or jump to **Parties** pane to see who is scheduled to attend/ordered services from the job. Each party listed includes their firm name and email address in our files.

10. Scroll or jump to **Repository** pane to add/view/download files:

    - To add files to the job, see Uploading files.

    - To view/download files, see Downloading & viewing files.

NOTE: Additional information pane
There might be an additional pane with information you provided about the job request.

Reference
- Job
- Dashboard
- Date Navigator
- Preferences

Step-by-step instructions
- Viewing monthly calendars
- Using your dashboard
- Requesting jobs
- Rescheduling jobs
- Changing job requests
- Canceling jobs
- Uploading files
- Downloading & viewing files

Creating recurring jobs

If you have a series of regularly scheduled jobs, save time by scheduling the jobs in advance with **Set Multiple Job Dates.** Select every day or specific days of the week within a time frame, and RB Connect automatically sets up the jobs.

1. ## Start new job

   1. To make multiple job requests at once, click **Calendar.**

   2. In the Calendar window, click **Request New.**

2. ## Enter job dates

   1. In the Calendar > Request New Job window, click **Set Multiple Job Dates.**

   2. In the **Set Job Dates** panel, select how you want to schedule the jobs in the **Type** pane:

      - **Scheduler**

        Default wizard adds dates within a range automatically.

        1. **Occurs:** Select Daily to create jobs for every day including Saturday and Sunday. Select Weekly to select the days of the week.

        2. **Weekdays:** If Weekly selected in **Occurs,** workdays are automatically selected and weekends are not. If desired, click to change any day's selection.

        3. **Duration:** Enter the ***Start Date** and ***End Date**.

      - **Fixed Dates**

        Add dates one at a time.

        1. In the **Job Date** pane, enter a date in the field or select a date in the Date Navigator.

        2. Click **Add New Date** and select another date.

        3. Repeat until you have entered all the dates.

   3. Click **Save.** The specified parameters appear in the **Job Date** field.

3. ## Enter job information

   1. Finish adding required job information:

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

        Required. Enter times or click ⏰ to select times in pop-up lists. If times will vary, you can update individual requests after saving.

   2. To enter other job information, see Requesting jobs.

   3. Click **Save.** Identical job requests are created for the specified dates, and you will receive an automatic email confirming the job requests. If any of the jobs varies, such as having a different start time, you can update the request's information as long as its **Job Status** in the Calendar window is Request New.

Reference

- [Job](#)
- [Date Navigator](#)

Step-by-step instructions

- [Requesting jobs](#)
- [Entering general job information](#)
- [Entering job locations](#)
- [Entering additional job information](#)

Entering general job information

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

1. Continue from Requesting jobs.

2. In the **General** pane, enter information/make selections:

   - ***Job Date**

     Required.

     - **If this is a single job,** enter the date the job will take place in the field or click 📅 to select date in Date Navigator.

     - **If this is a job with multiple dates,** see Creating recurring jobs.

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

     Required. Select times in pop-up lists for the job time range.

   - **Time Zone**

     Change if the job will take place in a different time zone than your default. Your default time zone is set in Preferences.

   - **Adjust clock for daylight saving changes**

     Click to select Yes so that request communications will have the correct time.

   - **Witness**

     Deponent's name. If you have more than one witness being deposed, you can either enter all of their names in one job, separated by commas, or create mutiple jobs, one for each witness.

   - **Subpoenaed Witness**

     Click to select Yes if deponent has been summoned to appear.

   - **Expert Type**

     If applicable, select the witness's expertise in the drop-down.

   - **Job Type**

     Select the category of job being requested in the drop-down.

   - **Case**

     If applicable, enter the case name.

   - **Case No.**

     If applicable, enter the case number.

   - **Specialties**

     If the job requires specific expertise or knowledge, click 🔲 and check the boxes of any required specialties.

   - **Confirmation Notes**

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

   - **NOTE: Additional information pane**

     To minimize the amount of information you enter in **Confirmation Notes,** there might be an additional

pane with fields and options you can use instead to give us more information about the job request.

3. When finished with general information:

- If you are not the ordering contact, click ***Ordering Contact's** ▣. In the Lookup Contact pane, click the hyperlinked name of the ordering contact.

- To enter job location information, see [Entering job locations](#).

- To attach files to the job request, see [Uploading files](#).

- If you don't have other information, click **Save.**

Reference

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

Step-by-step instructions

- [Creating recurring jobs](#)
- [Entering job locations](#)
- [Uploading files](#)

Entering job locations

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

If you have a hybrid meeting with some attendees in the same location and others participating via Zoom you can include that dual information here.

1. Continue from Requesting jobs.

2. In the **Job Location** pane, enter information:

- **Same Location as Ordering Firm**

   Click to select Yes to select the ordering firm's office (listed in **Ordering Firm** pane) as the location. If you select Yes you do not have to fill in any other location information.

- **Location**

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

- **Address**

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

   Click [icon] > **Google Maps/MapQuest Maps/Bing Maps** to view job location on a map in a new window.

- **City**

   Default is set in Preferences. If the job location is in a different city, enter the zip code first to have the city name automatically entered here.

- **State**

   Default is set in Preferences. If the job location is in a different state, enter the zip code first to have the state name automatically entered here.

- **Zip**

   Enter zip code in this field and click [icon]. You do not need to enter the **City** or **State.** They will automatically populate based on the zip code.

- **Phone**

   If the job is not at the ordering firm's office, enter the location's phone number

- **Directions**

   If the job is not at the ordering firm's office, enter any helpful instructions for finding the location. If this will be a hybrid meeting enter that information here.

TIP: Remote location information in RB Connect

If you want to request a Zoom meeting: Enter Zoom as the **Location.**

If you want to schedule a hybrid meeting: Enter the physical location's information in the **Location** fields and include a note in the **Directions** field that you want a simultaneous Zoom meeting set up.

Once scheduled, if a job is a remote or hybrid meeting you will find Zoom meeting information in the **Job Location** pane under **Location for Remote Participants:**

- **URL**

   Web address for the Zoom meeting

- **Notes**

  Zoom meeting ID and passcode plus dialup numbers for the meeting

3. When finished with location information:

   - To enter basic job information, such as the witness, case, and job type, see Entering general job information.

   - To attach files to the job request, see Uploading files.

   - If you don't have other information, click **Save.**

Step-by-step instructions

- Creating recurring jobs
- Entering general job information
- Uploading files
- Viewing your calendar
- Changing job requests
- Rescheduling jobs

Uploading files

Send job-related files along with job requests, or at anytime.

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. Continue from Requesting jobs or search for the job you want to upload files to (see Viewing your calendar).

    2. Click the job's hyperlinked **Job No.**

    3. In the **Files** pane of new job requests or the **Repository** pane of existing jobs, click .

    4. 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.

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

    6. Continue adding files if desired.

    7. 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.

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

3. ### Upload file(s)

    In the **New File(s)** panel, click **Upload.**

Reference

- Job
- ASCII

Step-by-step instructions

- Viewing your calendar

Rescheduling jobs

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

1. To search for the job you want to reschedule, see Viewing your calendar.

2. Click the job's hyperlinked **Job No.**

3. In the Calendar > Job window, click **Reschedule.**

4. In the **Reschedule Job** panel, enter:

   - ***New Job Date**

     Required. Enter the date the job will take place in the field or click 📅 to select date in Date Navigator.

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

     Required. Select times in pop-up lists.

   - ***Reason**

     Required. you are changing the Job Date

5. Click **OK.** You will receive an instant email acknowledgement of your request, the original job's status changes to Request Cancel, and a new job is added to your calendar with the status of Request Confirm. If you have files associated with the new job date, upload them in the new job's **Files** pane (see Uploading files.)

Reference

- Job
- Date Navigator

Step-by-step instructions

- Viewing your calendar
- Uploading files

Changing job requests

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

1. To search for the job you want to change, see Viewing your calendar.

2. Click the job's hyperlinked **Job No.**

3. In the Calendar > Job window, click **More > Request Change Job Info.**

4. In the **Request Change Job Info** panel, check the box(es) of field(s) to update, and make the change(s). See Requesting jobs, Entering general job information, and Entering job locations.

5. When finished updating the job information, click **Submit.** Our office will receive an alert notifying us of your request. When we update the job, you will receive an email confirmation.

NOTE: Upload files to jobs anytime

You do not need to request a job change to add files to a job in your calendar. You can upload files anytime to a job's **Repository** pane. See Uploading files.

Reference

- Job

Step-by-step instructions

- Entering general job information
- Entering job locations
- Uploading files
- Viewing your calendar
- Rescheduling jobs

Requesting job confirmations

If you want to check that your job request was received by our office, you can send a confirmation request with the click of a button and receive an automatic confirmation email.

1. If not already in the job's detail window, search for the job you want to request confirmation of (see Viewing your calendar).

2. Click the job's hyperlinked **Job No.** in the Calendar window.

3. In the Calendar > Job window, click **Request Confirm.** Our office will receive an alert notifying us of your request confirmation. When we accept your request, the job's **Status** changes to Request Confirmed. You should also receive an automatic email acknowledgement or other confirmation.

Reference

- Job

Step-by-step instructions

- Viewing your calendar

Canceling jobs

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

1. To search for the job you want to cancel, see Viewing your calendar.

2. Click the job's hyperlinked **Job No.**

3. In the Calendar > Job window, click **More > Request Cancel.**

4. In the **Request Cancel** panel, enter the reason for canceling the job in ***Reason.**

5. Click **OK.** You will receive an instant email acknowledgement of your request, and the job's **Status** changes to Request Cancel.

Reference

- Job

Step-by-step instructions

- Viewing your calendar

ASCII

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

PayPal

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

Step-by-step instructions

- Paying invoices

Finding transcript packages

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

Continued from [Viewing transcripts online](#).

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

   - ## Contact

     Default is ALL. To find transcript packages for one person, click ⬚. Then click the hyperlinked name in the **Lookup Contact** panel to select it.

   - ## Job No.

     Enter the number of the job associated with the transcript package.

   - ## Witness

     Enter part of a deponent's name.

   - ## Case Name

     To see transcript packages for a specific case, enter part of the case name into the field.

   - ## Job Date From/Job Date To

     Enter a date range that includes the scheduled job (see [Date Navigator](#)).

   - ## Word Search Type

     May not be available

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

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

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

   - ## Words to search for

     May not be available

     Enter text you want to find. Minimum number of characters for a search is 3, and minimum number of characters in a word to be searched is 2.

2. Click 🔍. All files that fit the search criteria appear in the grid.

Reference

- [Lookup panel](#)
- [Date Navigator](#)

Searching within transcripts

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

Continued from Viewing transcripts online.

1. In the Transcript Packages window, click **Search.**

2. Enter your search word(s) in the popup field and click .

3. **Page Mode** changes to **Word Mode,** the transcript jumps to the first instance of the text, highlights it, and displays the number of instances the text appears above the number of pages in the transcript at the top of the screen. Use:

   - and arrows to page through other instances of the searched text.

   - and arrows to jump to the first or last instance of the text in the transcript.

NOTE: Search is not case sensitive

You can enter a word with any combination of upper and lower case letters, and the Transcript Packages viewer will find all instances of the word regardless of capitalization.

Highlighting transcript packages

You can highlight lines in transcripts then export highlighted text to work with offline. You can set up multiple highlight colors to visually group content into categories in the transcript package, then export highlights by color to view their content offline.

Continued from Viewing transcripts online.

- ## Add highlights

  1. To highlight a line of text in the Transcript Packages window, click the ✐ at the end of the line.

  2. The line's background changes to the default highlight color. To remove highlighting click the highlighted line's ✐ .

  3. If you want to use a different highlight color, click **More > Highlight Colors.** In the **Highlight Colors** panel click a different color then click **Set Default.**

     ### TIP: Set up your own highlight colors

     You can set up multiple highlight colors in Transcript Packages to help you differentiate content. If you want to use different colors than listed in the **Highlight Colors** panel see Adding & removing highlight colors.

- ## Search highlights

  1. To find highlighted text in a transcript, click **Page Mode** at the top of the screen then select **Highlight Mode** in the drop-down.

  2. In the popup that appears, ALL is the default. To only search highlighted text of a particular color, click its radio button. Click **OK.**

  3. The Transcript Packages window displays:

     - First page of the transcript that has highlighted text.

     - Red arrow at the beginning of the first line of highlighted text.

     - Number of highlighted lines in the transcript above the number of pages in the transcript (in parentheses) at the top of the screen.

  4. Use the directional arrows to see other instances of highlighted text.

- ## Export highlights

  To export highlights, see Exporting transcripts.

Step-by-step instructions

- Adding & removing highlight colors
- Exporting transcripts

Adding & removing highlight colors

If you want to use different colors for highlighting lines in your transcripts than the colors listed in the Highlight Colors panel — or you no longer want a particular color option — you can manage your color highlights in Transcript Packages. You can also change your default highlight color.

1. To add or remove a color option for highlighting Transcript Packages, click **More > Highlight Colors.**

2. In the **Highlight Colors** panel, if you want to:

- ### Add a color

    1. Click **New.** In the **New Highlighting Color** panel, click the *Color field's ▼ .

    2. In the dropdown color picker, either:

        - Click a color swatch to select it.

        - Click then either:

            - Enter the desired color's 6-digit hexidecimal code in the **HEX** field.

            - Click the basic hue you want on the rainbow scale at the right side, then click the color you want in the large lightness and saturation square above the **HEX** field. The color appears in the *Color field.

    3. To save the color click **Apply.**

    4. Enter identifying text for the highlight in *Label.

    5. If you want this new color to be your default highlight color, click the **Default** slider to select Yes.

    6. Click **Save.**

- ### Remove a color

    You can remove any highlight colors except the default.

    1. Check the box(es) of color(s) you want to delete.

    2. Click **Delete.**

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

- ### Update the default color

    You can change the default color at any time. If you want to delete the default color, pick a different default, then you can delete the previous default.

    1. Check the desired default color's box.

    2. Click **Set Default.**

    3. Click **Close.**

Making notes in transcript packages

You can make notes on transcripts then export your notes to work with offline.

Continued from [Viewing transcripts online](#).

1. To add a note to a line of text in the Transcript Packages window, click the at the end of the line.

2. In the **New Note** panel, enter your note. To format the text, see [Customizing messages](#).

3. Click **Save.** changes to .

4. To find notes, click **Page Mode** at the top of the screen, then select **Notes Mode** in the drop-down.

5. The Transcript Packages window displays:

   - First page of the transcript that has a linked note.

   - Red arrow at the beginning of the first line of text with a linked note.

   - Number of lines in the transcript with notes above the number of pages in the transcript (in parentheses) at the top of the screen.

6. Use the directional arrows to find other notes.

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

8. In the **View Note** panel, if you make any changes or delete the information, click **Save.** Otherwise, click **Cancel** to close the panel.

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

Step-by-step instructions

- [Customizing messages](#)
- [Exporting transcripts](#)

Exporting transcripts

You can export transcripts from Transcript Packages in several formats, including AMICUS, PDF/A, condensed, highlights, and word list.

Continued from Viewing transcripts online.

1. To export the transcript or related content to your desktop, click **Export.** In the **Export** panel, click the radio button for the type of file you want to export:

   - **AMICUS**

     Default. Specific ASCII file format.

   - **Full-page Transcript**

     To create an RB-PDF Transcript, including PDF/A versions, click **Next.** To change any settings in the **Export – Full-page Transcript** panel, see Customizing full-page transcript preferences.

   - **Condensed Transcript**

     To create a reduced size RB-PDF Transcript, click **Next.** To change any settings in the **Export – Condensed Transcript** panel, see Setting condensed transcript preferences.

   - **Word Index**

     To create a list of words appearing in the transcript with page references, click **Next.** To change any settings in the **Export – Word Index** panel, see Setting word index & word list preferences.

   - **Word List**

     To create a list of words appearing in the transcript with the number of times each word appears, click **Next.** To change any settings in the **Export – Word List** panel, see Setting word index & word list preferences.

   - **Highlights**

     To export a file of highlighted text in the transcript, click **Next.** In the **Export – Highlights** panel, ALL is selected by default. To only include one category of highlighted text, click its radio button. (See Highlighting transcript packages.) The exported file lists the highlighted text and includes the page, line, and highlight label for each line listed.

   - **Notes**

     File of notes made on the transcript and attached files. (See Highlighting transcript packages.)

2. Click **Export** to save the file to your device.

Reference	**Step-by-step instructions**
• AMICUS	• Customizing full-page transcript preferences
• RB-PDF Transcript	• Setting condensed transcript preferences
• Condensed Transcript	• Setting word index & word list preferences
• Word Index	• Highlighting transcript packages
• Word List	

Customizing full-page transcript preferences

Customize the appearance of a PDF transcript.

Continued from [Exporting transcripts](#).

In the **Export – Full-page Transcript** panel of the Transcript Package window, update defaults and make selections:

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

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

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

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

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

  - **None** – No border.

  - **Double** – Two-lines border.

- **Border Thickness**

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

- **Timestamp Location**

  Select where timestamps appear on each page of the transcript.

- **Show divide line for numbers**

  Select Yes if you want to separate line numbers from the transcript contents with a vertical rule line.

- **Make line number outside the box**

  Select Yes if you want to place line numbers outside borders. (Choosing this option sets all borders to single width.)

- **Font Name**

  Select a typeface in the drop-down.

- **Font Bold**

  Select Yes if you want to use the boldface version of the font selected in **Font Name.**

- **Q&A Bolding**

  - **Questions Only** – Default. Questions in their entirety will be displayed in boldface.

  - **None** – No questions or answers will appear in boldface.

  - **Letter Q Only** – Initial letter Q will appear in boldface, but question contents will not.

  - **Answers Only** – Answers in their entirety will be displayed in boldface.

  - **Letter A Only** – Initial letter A will appear in boldface, but answer contents will not.

  - **Questions and Answers** – Everything in Q&A format will appear in boldface.

  - **Letter Q and A** – Both initial letters Q and A will appear in boldface, but question and answer contents will not.

- **Q&A Color**

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

1. Click the color field and in the popup color picker either:

   - Edit the 6-digit hexidecimal code.

   - Click the basic hue you want on the rainbow scale at the bottom, then click the color you want in the large lightness and saturation square.

2. Click **Apply.**

- **PDF Format**

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

Reference

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

Step-by-step instructions

- [Exporting transcripts](#)

Setting condensed transcript preferences

Customize the appearance and basic options of a condensed transcript.

Continued from Exporting transcripts.

In the **Export – Condensed Transcript** panel of the Transcript Package window, update defaults and make selections:

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

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

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

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

  - **Single** – Default. One-line border.
  - **None** – No border.
  - **Double** – Two-lines border.

- **Border Thickness**

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

- **Timestamp Location**

  Select where timestamps appear on each page of the transcript.

- **Show divide line for numbers**

  Select Yes if you want to separate line numbers from the transcript contents with a vertical rule line.

- **Font Name**

  Select a typeface in the drop-down.

- **Q&A Bolding**

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

- **Q&A Color**

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

  1. Click the color field and in the popup color picker either:

     - Edit the 6-digit hexidecimal code.

     - Click the basic hue you want on the rainbow scale at the bottom, then click the color you want in the large lightness and saturation square.

2. Click **Apply.**

- **Layout**

  - **2 columns x 2 rows (4 per page)** – Default.
  - **2 columns x 1 rows (2 per page)** – Print 2 ASCII pages to a single page in landscape mode only.

- **Page Order**

  - **Vertical** – Default. The reduced-size pages will appear on the page reading from top down, then left to right.
  - **Horizonal** – The reduced-size pages will appear on the page reading from left to right, then top down.

- **Page Number Position**

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

- **Font Scale Mode**

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

- **Do not condense first X pages**

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

- **Do not condense last X pages**

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

- **PDF Format**

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

Reference

- RB-PDF Transcripts
- Condensed transcripts
- PDF/A

Step-by-step instructions

- Exporting transcripts

Setting word index & word list preferences

Customize the appearance and basic options of a word index or word list.

Continued from Exporting transcripts.

In the **Export – Word Index** or **Export – Word List** panel of the Transcript Package window, update defaults and make selections:

- ## Margin Top/Margin Bottom/Margin Left/Margin Right

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

- ## Border Top/Border Bottom/Border Left/Border Right

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

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

  - **None** – No border.

  - **Double** – Two-lines border.

- ## Border Thickness

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

- ## Font Name

  Select a typeface in the drop-down.

- ## Font Size

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

- ## Columns

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

- ## Show Word Count

  Word List only

  Select Yes to include the number of times each word in the list appear in the transcript.

Reference

- RB-PDF Transcripts
- Word Index
- Word List

Step-by-step instructions

- Exporting transcripts

Amicus

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

Reference

- RB-PDF Transcripts
- ASCII

Step-by-step instructions

- Exporting transcripts

Condensed Transcript

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

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Exporting transcripts

RB-PDF Transcripts

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

Reference

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

Step-by-step instructions

- [Exporting transcripts](#)

PDF

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

Reference

- RB-PDF Transcript
- PDF/A

Step-by-step instructions

- Exporting transcripts

PDF/A

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

Reference

- RB-PDF Transcript
- PDF

Step-by-step instructions

- Exporting transcripts
- Customizing full-page transcript preferences

Word Index

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

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Exporting transcripts

Word List

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

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Exporting transcripts

Linked exhibits

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

Reference

- RB-PDF Transcript

Step-by-step instructions

- Exporting transcripts

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. **Firm Info** fields are uneditable. If any of this information is incorrect, contact our office. In the **My Info** pane, 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.

   - ***Main Phone**

     Required. Your firm's phone number.

   - **Direct Phone**

     Your phone number at the firm.

   - **Mobile Phone**

     Your cell phone number.

   - **Mobile Vendor**

     Your cell phone service provider.

   - **Fax**

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

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.

- ### To 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.**

- ### To personalize your dashboard:

  See Arranging your dashboard.

- ### To view upcoming scheduled jobs:

  - **Individual job listed** – Click the hyperlinked job number and see Viewing job details.
  - **Other jobs/all jobs** – See Viewing your calendar.

- ### To download files:

  - **Files for job listed** – See Downloading & viewing files.
  - **Files for other jobs/all jobs** – See Searching repositories.

- ### To view/pay invoices:

  See Viewing account activity.

Step-by-step instructions

- Arranging your dashboard
- Viewing job details
- Viewing your calendar
- Downloading & viewing files
- Searching repositories
- 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 of 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 **Calendar** 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. ## Set new job preferences

   1. In the **New Job** pane:

      - **Default City**

        Enter the name of the city where most of your jobs take place.

      - **Default State**

        Select the **Default City's** state, province, or territory in the drop-down.

      - **Default Time Zone**

        Select your time zone in the drop-down.

      - **Adjust clock for daylight savings changes**

        Click to select Yes if you want the job clock to change with daylight savings time.

4. **Save preferences**

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

Reference

- [Results pane](#)
- [Calendar](#)

Step-by-step instructions

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

Logging out

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

1. To log out, click **[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 request, before logging out, be sure to save your work first. RB Connect does not automatically save your work for you.