RB Web Mobile apps for attorneys, paralegals and secretaries

User Guide

Table of Contents

Program Basics

Logging in 1

My Web

Changing your user ID & password 1

Reviewing & updating your personal information 2

Accessing your non-case files 2

Calendar

Viewing your calendar 3

Invoices

Viewing your account 4

Transcripts

Viewing transcripts 5

Repository

Reviewing case-wide documents 6

Support

Asking for help & other information 7

Program Basics

Logging in

Sign in to our app with your user ID and password. After your initial sign-in, you do not have to sign in again unless you change your user ID and/or password. If you do not have a user ID and password, or have forgotten them, contact us before attempting to sign in.

My Web

Changing your user ID & password

You can change your user ID and password at any time.

1. Select **My Web.**

2. To change your user ID, select **Change ID.**

3. Your current user ID appears above the **New ID** field. Enter your new ID and select **Save.**

4. To change your password, select **Change Password.**

5. Enter your current password in the **Current Password** field. Enter your new password in the **New Password** and **Confirm Password** fields, and select **Save.**

WARNING

If you change your user ID and/or password, we will not have a record of your new user ID/password. Keep a copy of your new user ID/password in a safe place. If you lose your user ID/password, we can issue you a new one.

My Web

Reviewing & updating your personal information

Use the My Web area to update your contact information with us, such as your phone numbers and email addresses.

1. Select **My Web.**

2. To change your contact information, select **My Profile.** You can change the information in any field in the My Info section and leave any field blank except required fields. Required fields appear in red with an asterisk (*) after the field label.
   - **Email** – Enter the email address you want us to use for all email correspondence with you, except:
   - **Confirmation Email** – If you prefer to have automatic confirmation emails sent to another party, such as a secretary, enter the new email here. If you leave this field blank, no confirmation emails will be sent.
   - **Billing Email** – If you prefer billing emails to be handled directly by your billing department or other person, enter the new email here. If you leave this field blank, no billing emails will be sent.

3. Select **Save.**

TIP

You can enter multiple email addresses in any of the email fields if you separate the addresses with commas.

My Web

Accessing your non-case files

In addition to storing your transcripts, other case files and invoices, we can also store files related to transactions between our firms and with you individually. Examples of these types of files include our rate sheets and contracts. You can access these files anytime in the My Web area.

1. Select **My Web.**

2. To see a list of files we maintain with:
   - Your firm – select **Firm Repository.**
   - You individually – select **Attorney Repository.**

3. To view a file, select it in the list, then select **Download**.

4. To track your file viewing, select **Mark as Reviewed** for any files you have viewed. The date and time replaces **Mark as Reviewed.** To clear tracking for any file, **select Clear Review Mark,** then **OK.**

Viewing your calendar

You can view all of your requested jobs, their current status and individual job details on your smart phone. If you are on route to a deposition or other proceeding and need directions, you can get directions to the scheduled location from within a job listing.

1. Select **Calendar** to display all of your requested jobs for the current month.

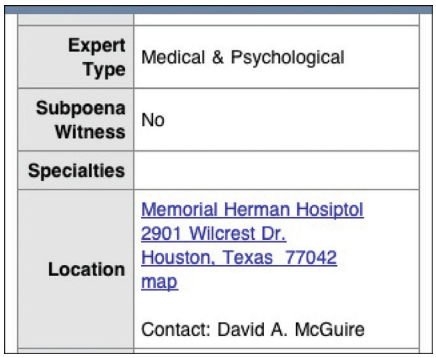
Calendar

2. Today's date is highlighted, and if there are any jobs today, they are listed below the calendar. Navigate to other months by using the arrows at the top of your calendar.

3. Dates with scheduled jobs are marked with a dot. Select a marked date to view its scheduled job(s).

4. To see a scheduled job's details, select it.

5. In Location, select **[location name] map** to view the location on a map and get driving directions.



Viewing your account

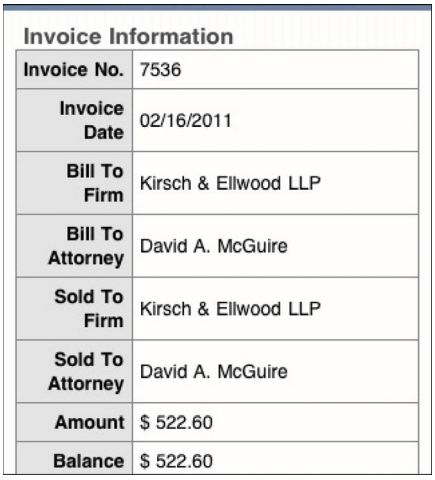
You can look up billed amounts and outstanding balances of current and past invoices on your smart phone.

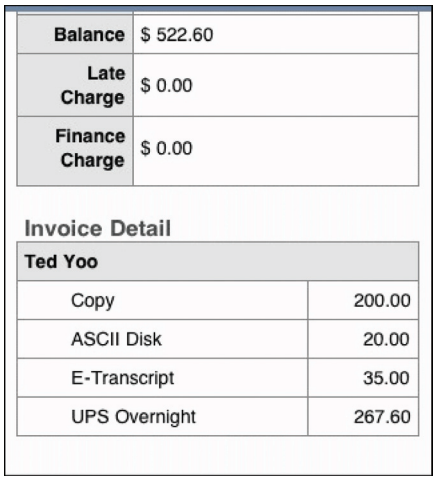
1. Select **Activity.**

2. Search for invoices by using one or more search filters:
   - **Invoice Date From/To** – To see invoices for different time periods, select new beginning and end dates.
   - **Case Name** – To see invoices for a specific case, enter part of the case name into the field.
   - **Account Status** – To view only open invoices or only paid invoices, select that choice in the list.
   - **Attorney** – To find invoices for a specific attorney, select one in the list.

3. Select **Search.**

4. Any invoices that match your search criteria appear. View any invoice's details by selecting it from the list.





Viewing transcripts

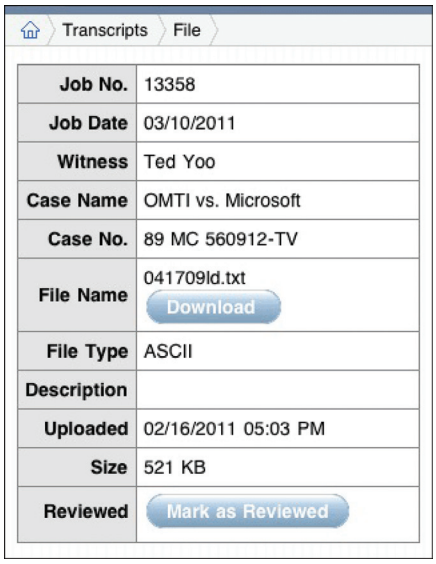
Download and view your transcripts on your smart phone.

1. Select **Transcript.**

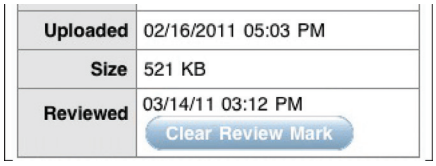
2. Search for transcripts by using one or more search filters:
   - **Case Name** – To find transcripts on a specific case, enter part of the case name.
   - **Witness** – To find a specific witness, enter part of the witness's name.
   - **Job Date To/From** – To find transcripts for a specific job date range, select new beginning and end dates.
   - **Attorney** – To find transcripts for a specific attorney, select one in the list.

3. Select **Search.**

4. All potential matches to the information you entered appear. To view a transcript, select it in the list, then select **Download** next to **File Name.**



5. To track your file viewing, select **Mark as Reviewed** for any files you have viewed. The date and time replaces **Mark as Reviewed.** To clear tracking for any file, **select Clear Review Mark,** then **OK.**



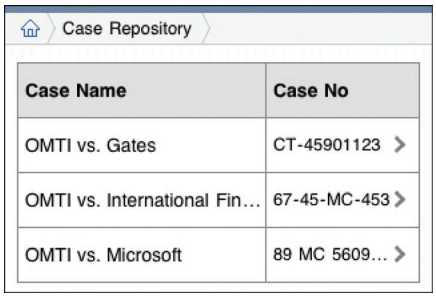
Reviewing case-wide documents

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

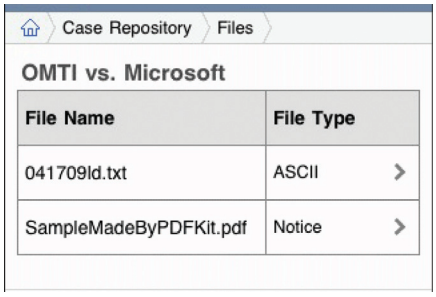
1. Select **Repository.**

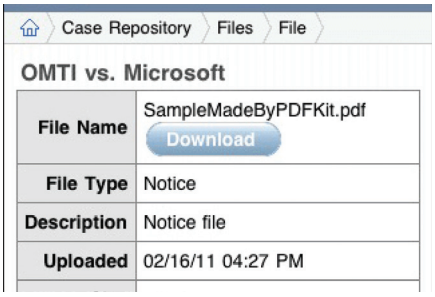
2. Search for a case by using one or more search filters:
   - **Case Name** – Enter part of the case name into the field.
   - **Case No.** – Enter part of the case (cause) number.
   - **Attorney** – Select an attorney in the list.

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



4. To view a file, select it in the list, then select **Download**.





5. To track your file viewing, select **Mark as Reviewed** for any files you have viewed. The date and time replaces **Mark as Reviewed.** To clear tracking for any file, **select Clear Review Mark,** then **OK.**

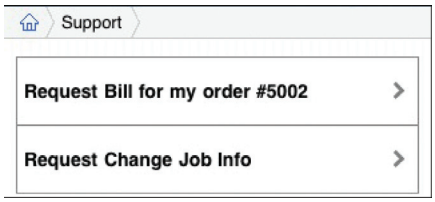
Asking for help & other information

If you have the option, you can make requests other than automated ones with Support Tickets. After making an inquiry, you can track its resolution and continue the discussion with us in the Support area.

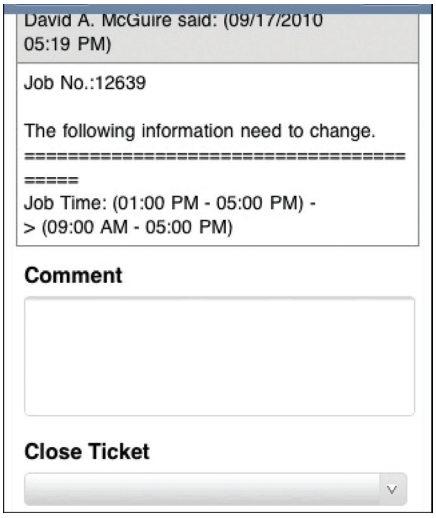
1. To make or track an inquiry, select **Support.**

Support

2. Any outstanding support issues are listed. To track progress on an issue, select it.



3. In the support ticket screen, you can:
   - Review the issue's history.
   - Enter a new comment in the **Comment** field.
   - Close the ticket by selecting a support resolution rating in the list.



4. Select **Save** to update the issue's history. Or select **Cancel** to return to the list without sending your update.

5. To start a new support ticket, select **New.**

6. In Support > New Ticket, enter the following information:
   - **Subject** (required) – A descriptive title for your inquiry makes it easier to track if you have multiple inquiries.
   - **Description** (required) – A detailed description will help us understand your inquiry and resolve it sooner.

7. Select **Save.** Or select **Cancel** to return to the list without sending your request.

Monitoring your reward points

If you have the option, you can check how many points you have available currently and in the future. Plus, you can look up your previous point history.

1. Select **My Points.**

2. Select Current Statement to see an overview of your points account as well as other relevant information, such as contact information. In the overview, you can 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 since account was opened** – Amount displayed includes all redeemable points earned including those already redeemed or transferred.
   - **Points spent since account was opened** – Amount shown is all redeemed and transfered points.

3. To see which invoices have posted, any adjustments made and any redemptions applied, select **History.**

4. Enter dates in the **Activity Date From/To** fields to specify a time range to display and select **Search.**

5. In the results that appear, you can view:
   - **Activity Type** – Point transactions are designated as Earn, Redeem, or Transfer.
   - **Date** – Date the transaction occurred.
   - **Transaction Details** – Earned point transactions display Invoice # & Date, transferred point transactions display whether points were given to or received from a particular party's name, and redeemed point transactions display the type of redemption, such as cash.
   - **Points** – Number of points involved in the transaction.
   - **Status** – Pending displays until the associated invoice has been paid.

My Points

Redeeming reward points

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

1. To redeem your outstanding points, select **Request Redemption.**

2. Choose a redemption type in **Redeem Method** (required) list, such as Cash or Gift Certificate.

3. In **Points to Redeem** (required), your total outstanding points appear. Enter a different number if you want to redeem any amount less than the total.

4. In **Deliver To,** select the address in the list you want your reward sent to.

5. Enter any special instructions in regards to this request in the **Notes** field, such as a delivery address if you selected Manually type the delivery address in Notes in the **Deliver To** drop-down above.

6. Select **Save** to send your request.

TIP

The dollar equivalent for points appears next to the **Points to Redeem** field. Use this number to calculate the dollar amount of your redemption request.

My Points

Transferring reward points

Transfer points to other people in your firm.

1. To give points to someone else in your firm, select **Transfer Points.**

2. Select someone in your firm to receive your points in **Transfer To** (required).

3. Enter number of points to transfer in **Points to Transfer** (required). You can transfer any number of points up to your current outstanding amount displayed as the default here from your account to anyone else's in your firm.

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