This document package includes the reference guides you will need to access your GrayRobinson desktop from a remote location. This package is comprehensive; you will not need to use all the instructions that are included. Below are some scenarios; pick the one that pertains to you.

1. **If you are a staff member and have never worked remotely before:**

   a. Start with document No. 1 (*How to Enroll in Duo*) to enroll your mobile phone with Duo. Duo is what the firm uses for multi-factor authentication, which provides extra security when you connect to the office remotely.

   b. Next, go to document No. 3 (*Initial Installation for Citrix Remote Access) to* install the Citrix receiver on your home computer.

   c. Finally, use document No. 4 (*Citrix Login)* to access Outlook, FileSite, Power PDF, Aderant and more.

2. **If you are an attorney who has never worked remotely before and you have your GR laptop with you:**

   a. Start with document No. 1 (*How to Enroll in Duo*) to enroll your mobile phone with Duo. Duo is what the firm uses for multi-factor authentication, which provides extra security when you connect to the office remotely.

   b. Next, go to document No. 2 (*Using Your GR Laptop to Connect to the Office (VPN)).* Using the VPN (virtual private network) provides access to all of the applications you have at the office.

3. **If you are an attorney who has never worked remotely before and you DO NOT have your GR laptop with you:**

   a. Start with document No. 1 (*How to Enroll in Duo*) to enroll your mobile phone with Duo. Duo is what the firm uses for multi-factor authentication, which provides extra security when you connect to the office remotely.

   b. Next, go to document No. 3 (*Initial Installation for Citrix Remote Access) to* install the Citrix receiver on your home computer.

   c. Finally, use document No. 4 (*Citrix Login)* to access Outlook, FileSite, Power PDF, Aderant and more.

4. **If you are an attorney who has worked remotely before and you have your GR laptop with you:**

   a. Use document No. 2 (*Using your GR Laptop to Connect to the Office (VPN))* to connect to the office remotely. Using the VPN (virtual private network) provides access to all of the applications you have at the office.

5. **If you are an attorney who has worked remotely before and you DO NOT have your GR laptop with you:**

   a. Use document No. 4 (*Citrix Login)* to access Outlook, FileSite, Power PDF, Aderant and more.

6. **If you are an attorney who has a GoToMyPC account:**

    a. Use document No. 5 (*GoToMyPC Login)* to access your office desktop.

Also, this package includes instruction on how to use Citrix from a Mac computer and how to forward your extension to your cell or other phone.

How to Enroll Duo Security

GRAY | ROBINSON
ATTORNEYS AT LAW

Follow these steps to register your phone and install the Duo Mobile application on your smartphone or Apple/Android tablet.
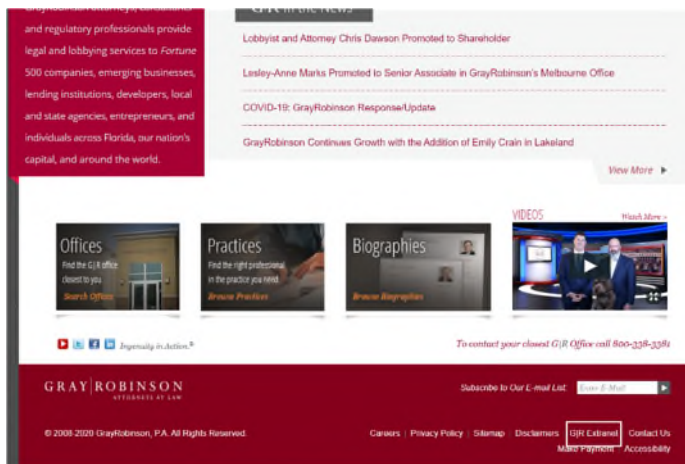
Install Duo Mobile

On your smartphone, go to the App Store (iPhone) or Google Play (Android) and search for the **Duo Mobile** app. Install the app on your smartphone.

Enroll Your Smartphone

Go to the GrayRobinson website, www.gray-robinson.com. At the bottom of the home page, click on **G|R Extranet**.

At the GR Extranet screen, click the **GrayRobinson Outlook Web Access** button.
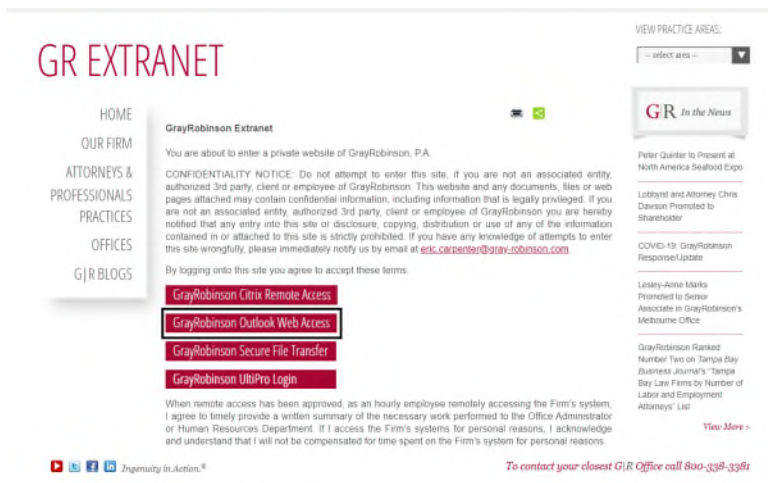
Type in your computer credentials: your username in the User name: field and your computer password in the Password field. Click the **sign in** link or press Enter on your keyboard.
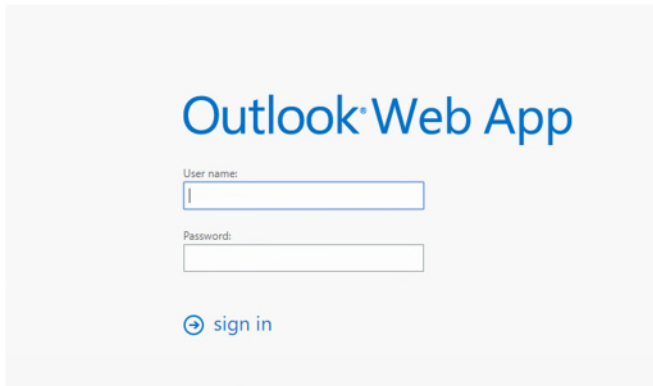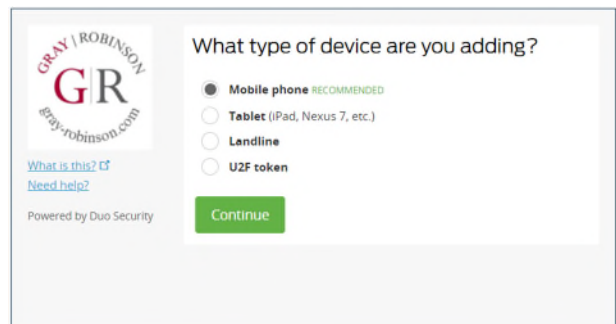
You will see this pop-up window:
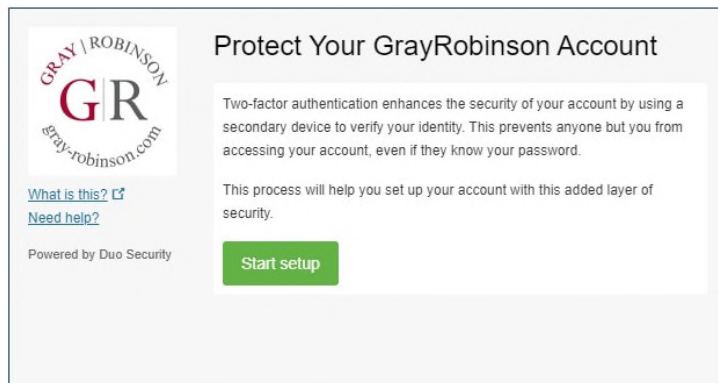
Click **Start setup** to begin enrolling your device.

Select the type of device to enroll and click **Continue.**

Confirm *United States* appears in the first field. Type your phone number in the second field. Use the number of the smartphone, landline, or cell phone that you will have with you when logging into Citrix, GoToMyPC or VPN.

NOTE: If you are enrolling a tablet, you will not be prompted for a phone number.
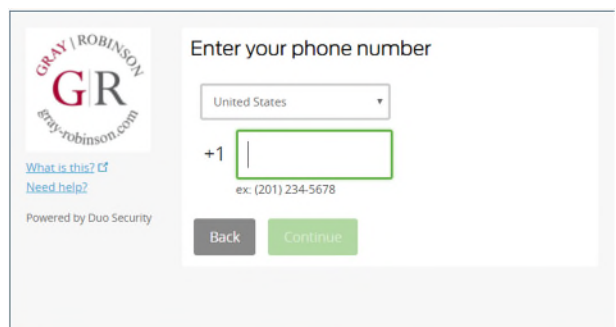
Confirm that you entered the number correctly, check the box **[your number] This is the correct number.** Click **Continue**.
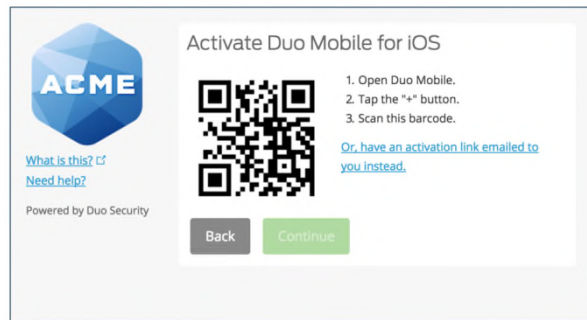
Click **"I have Duo Mobile installed."**
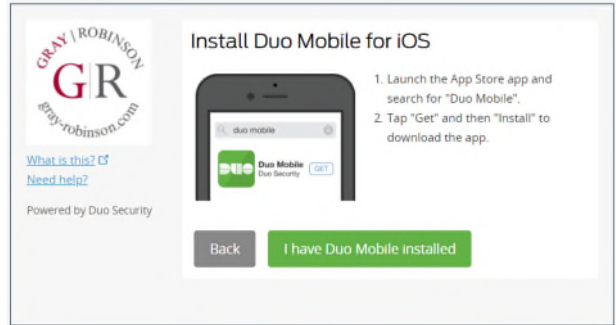
Activate Duo Mobile

Open the **Duo** app on your smartphone and click the **Add Account** button. This will open the camera on your phone. **If the app requests permission to access your camera, allow it**.

Hold the phone in front of your computer screen, positioned over the QR bar code.

After you successfully scan the QR barcode, the **Continue** button will become available.
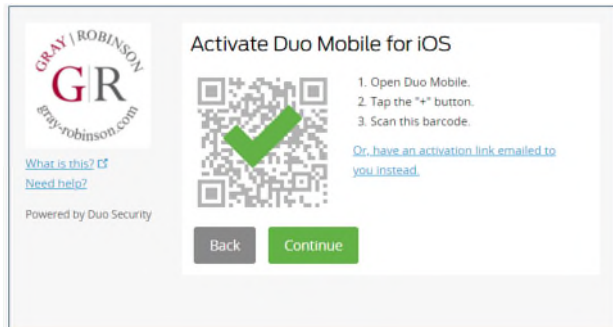
Can't scan the barcode? Click <u>Or, have an activation link emailed to you instead</u> and follow the instructions.

At the **When I log in:** field, click the drop-down arrow and choose "Automatically send this device a Duo Push."
Click **Finish Enrollment** to complete the enrollment process.
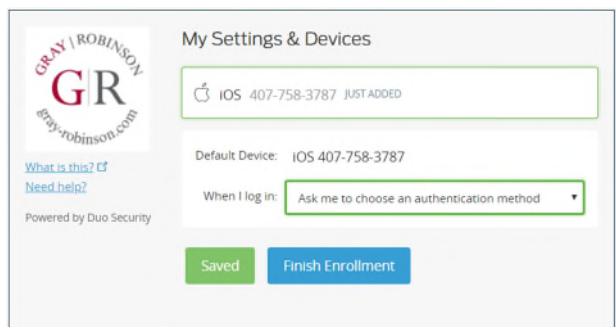
Congratulations! Your device is ready to approve Duo authentication requests. Click **Send me a Push** to give it a try. All you need to do is tap **Approve** on the Duo login request received on your phone.

How to Login to Citrix, GoToMyPC or VPN:

- At the login screen for Citrix, GoToMyPC or VPN, enter your network username and password (the credentials you use to login to the computer at the office).

- Enter the DUO token number provided in the Duo app on your phone to verify your identity (you can also use a tablet, fob, landline, etc.)

- Click Login for secure access.

#38379631 v2

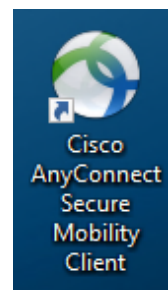# Using Your GR Laptop to Connect to the Office (VPN)

VPN (Virtual Private Network) is a secure way for you to use your GR firm-issued laptop to connect to firm resources, such as locally-saved documents and custom applications. You can use VPN anywhere outside the office with access to a secured Wi-Fi connection.

To begin using VPN, confirm your laptop is connected to a secure wireless network.

- To check your wireless connection, click the wireless button located in the system tray at the bottom right of your laptop.

- You will see a list of available wireless networks; click the one you want, e.g., your home network; provide the password for that network and click **Connect**.
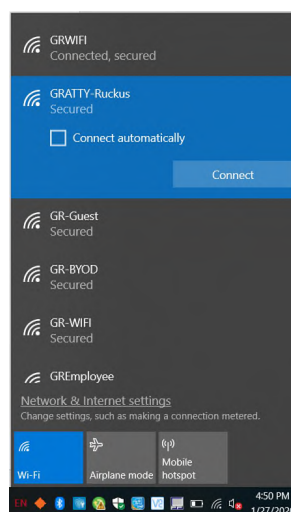
1. Once your laptop is connected to a wireless network, click the **Cisco AnyConnect Secure Mobility Client** icon on your desktop. <u>If you cannot find the icon, click the Search area in the lower-left corner of your computer and begin to type "Cisco."</u> When you see the Cisco AnyConnect Secure Mobility Client icon, click to open it.
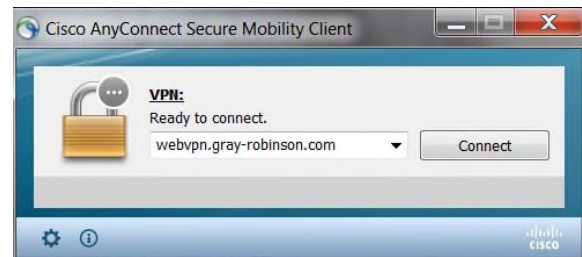

<u>Note</u>: The first time you use VPN, the field may be empty. Type in **webvpn.gray-robinson.com**. This will remain in the field going forward.

Using Your GR Laptop to Connect to the Office (VPN)

You will see this window.

2. Click **Connect**.

3. Enter your username in the **Username** field. Enter your computer password in the **Password** field. Click **OK.**

4. You will receive a notification on your phone from Duo Mobile.

5. Touch the Login request to open Duo. Click the **Approve** button to complete the login process.

NOTE: Keep your phone close by; click the Approve button as soon as it hits your phone to avoid a time out.
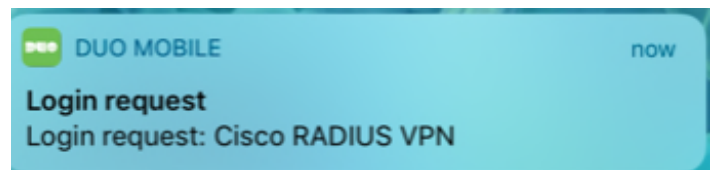
When your computer connects successfully, a confirmation box will appear in the lower right-hand corner of the screen: **Cisco – VPN Connected to webvpn.gray-robinson.com.**

You are free to begin working.

Initial Installation - Citrix Remote Access

Citrix Remote Access provides secure access to the firm's computer resources using a web browser and any available computer. Key benefits include the speed and responsiveness of applications, ease-of-use and security. It does not require your work PC to be powered on, monitor configurations are less challenging and both Mac and Windows operating systems are supported using most web browsers.

This solution provides access to the majority of firm-standard applications, including Microsoft Office, FileSite, Aderant and Big Square. It does not currently provide access to custom and office-specific applications, such as Propel, Close-It, Lawgic or DoubleTime. These applications may be included during a later release, if possible.

Citrix Remote Access is not currently supported from mobile devices, such as the iPad, iPhone or Android tablets and phones, and the ability to locally save documents is prohibited by firm policy. For security reasons, **after one hour of inactivity the application will close automatically**.

These instructions will guide you through the process of installing the Citrix Receiver on your remote computer. You install the Citrix Receiver only once per computer.

1. Open Internet Explorer and go to
   https://citrix.gray-robinson.com

   OR

   Go to www.gray-robinson.com and scroll to the bottom of the page. Click on G|R Extranet. Click the first button on Extranet page, **GrayRobinson Citrix Remote Access**.
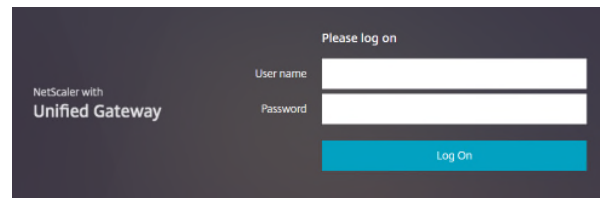
   - Type your user name in the ***User name*** field.
   - Type your network password in the ***Windows Password*** field.
   - Click **Log On**.
   - Choose the ***Duo*** authentication method (Send Me a Push, Call Me or Enter a Passcode).
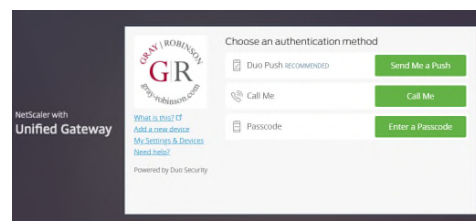
2. Click the checkbox "I agree with the Citrix license agreement," then click **Install**.
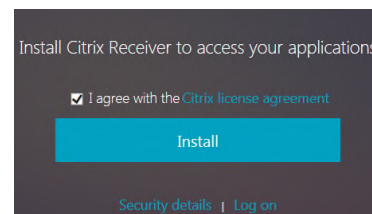
   NOTE: *If you use Google Chrome as your web browser, you may see this security warning. Click **Keep**, then run the file.*
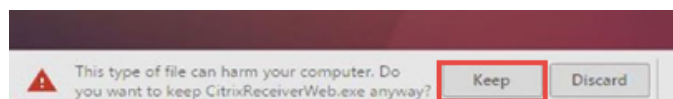
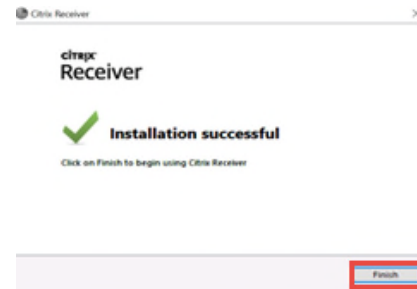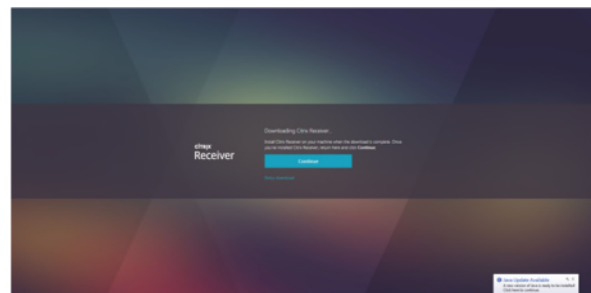3. Click Run to install CitrixReceiverWeb.exe. This will take a moment.

5. Click the checkbox for *I accept the license* agreement, then click **Install.** You will see a progress window as the Citrix Receiver software installs.
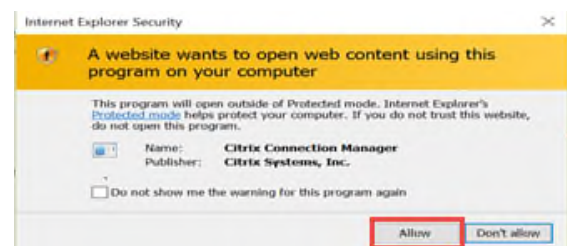
6. Once the installation is complete, you will see this window; click **Finish.**
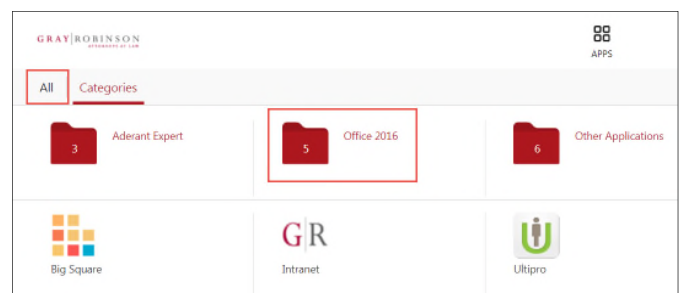
7. If you see this window, click **Continue.**

8. Click **Allow** if the Internet Explorer Security window appears.

9. When the Citrix application page opens, select the appropriate icon or category (for example: Office 2016 to access Outlook, Word, etc.), or click **All** to see all programs available on Citrix.

Initial Installation for MAC - Citrix Remote Access

Citrix Remote Access provides secure access to the firm's computer resources using a web browser and any available computer. Key benefits include the speed and responsiveness of applications, ease-of-use and security. It does not require your work P.C. to be powered on, monitor configurations are less challenging and both Mac and Windows operating systems are supported using most web browsers.

This solution provides access to the majority of firm-standard applications, including Microsoft Office, FileSite, Aderant and Big Square. It does not currently provide access to the Client Matter Memo or other custom and office-specific applications such as Propel, Close-It, Lawgic or DoubleTime. These applications may be included during a later release, if possible.

Citrix Remote Access is not currently supported from mobile devices, such as the iPad, iPhone or Android tablets and phones, and the ability to locally save documents is prohibited by firm policy. For security reasons, **after two hours of inactivity the application will close automatically**.

These instructions will guide you through the process of installing the Citrix Receiver on your Mac computer. You install the Citrix Receiver only once per computer.

*** <u>Please Note</u>: **Your Mac computer must be using at least OS X 10.10 (Yosemite) to install the receiver. ***

1. Open a browser and go to https://citrix.gray-robinson.com

   OR

   Go to www.gray-robinson.com and scroll to the bottom of the page. Click on G|R Extranet. Click the first button on Extranet page, **GrayRobinson Citrix Remote Access**.
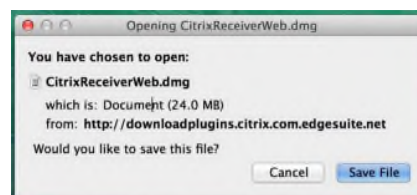
   - Type your user name in the *User name* field.
   - Type your network password in the *Password* field.
   - Click **Log On**.
   - Choose the *Duo* authentication method (Send Me a Push, Call Me or Enter a Passcode) to login.
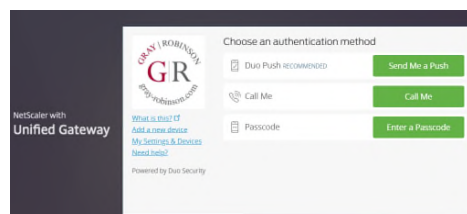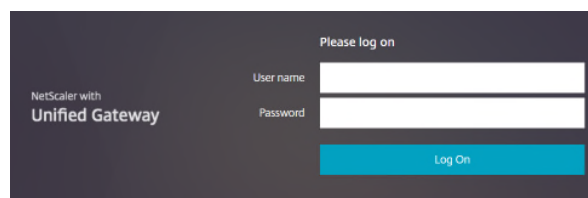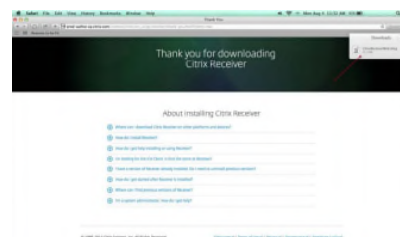
2. Depending upon what browser you use, you may see one of these notices:

   From FireFox:
   > Click **Save File**

   From Safari:

3. Access the Downloads folder on your Mac. Find and select the **CitrixReceiverWeb.dmg** file. When prompted, click **Install Citrix Receiver**.

4. Follow the instructions provided by the Receiver Installer.

5. Click **Agree** to accept the terms of the license agreement.

6. Type your computer user name and password, then click **Install Software** to finish the installation process.

7. When the Citrix application page opens, select the appropriate icon or category (for example: Office 2016 to access Outlook, Word, etc.), or click **All** to see all programs available on Citrix.
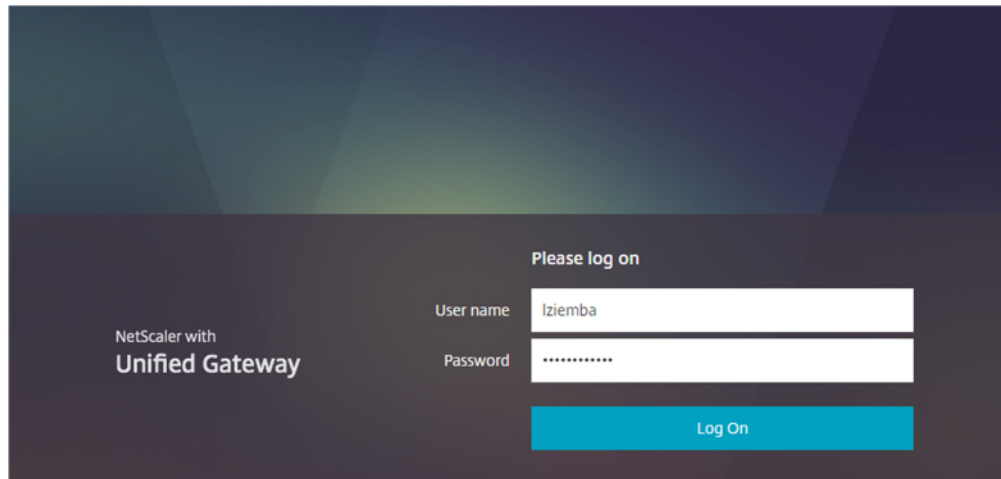
Citrix Login Using Duo

GRAY | ROBINSON
ATTORNEYS AT LAW
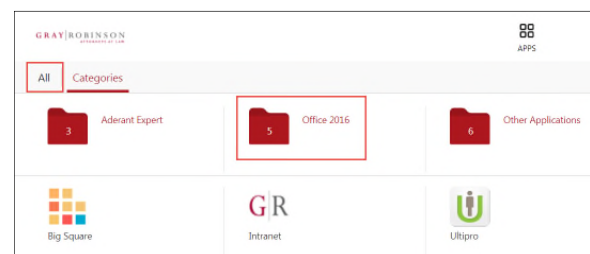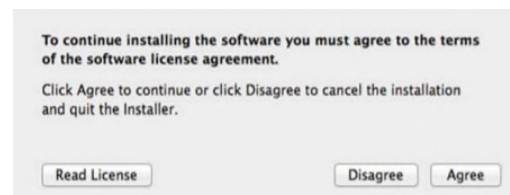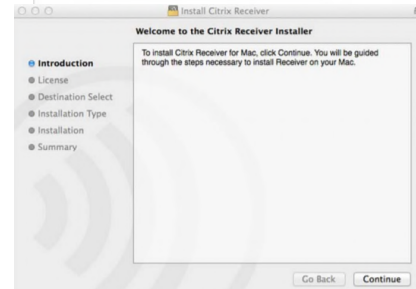
How to Login to Citrix

At the login screen for Citrix, enter your network **User name** and **Password** (the credentials you use to login to the computer at the office).

Click the **Log On** button.
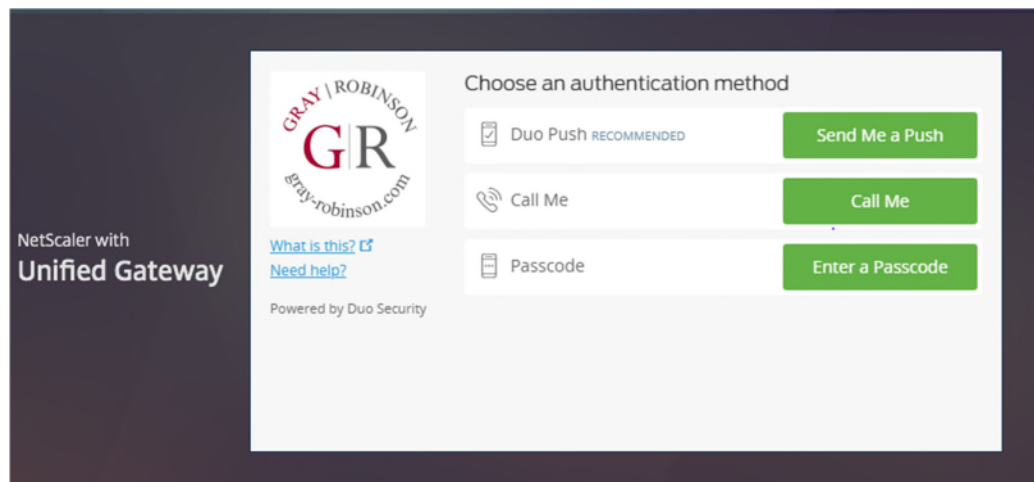

At the *Choose an authentication method* screen, click one of the following buttons:

a. **Send me a Push** – to get a prompt on your phone or other Duo device

b. **Call Me** – to get a callback from Duo
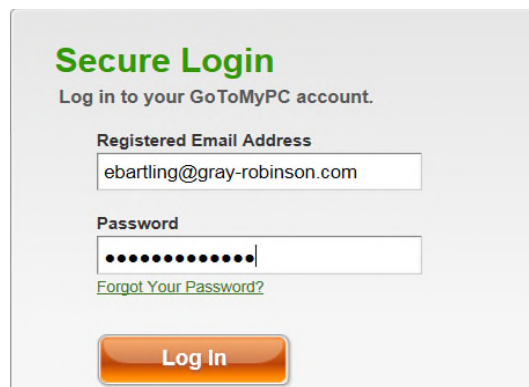
c. **Enter a Passcode** – To use this option, click this button, then enter the six digit Duo code provided in the Duo app on your phone. **Note:** *Tap the down arrow by Gray-Robinson in the Duo app to find the code.*

Login to GoToMyPC Using Duo

Browse to the www.gotomypc.com site.
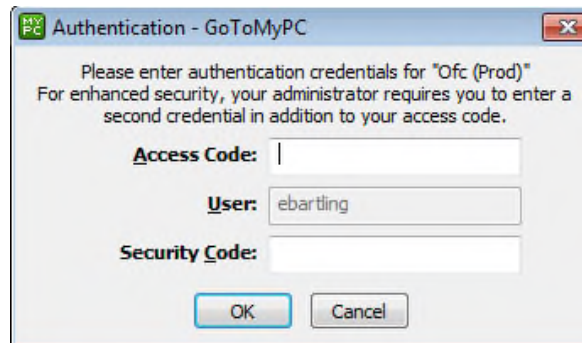
1. Login using your email address and your GoToMyPC password.

2. Click **Connect**.
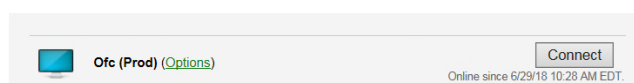
3. In the **Access Code** field, enter your GoToMyPC access code.

4. In the **Security Code** field, type the word "push."

NOTE: After enrolling in Duo, the initial login to GoToMyPC will take approximately 45 seconds; subsequent logins will be much faster.

5. On your phone or tablet, tap **Approve**.

NOTE: Make sure you have enabled notifications from the Duo app on your phone or tablet.

Call Forwarding – How to forward calls to another number

To forward calls to another phone (mobile phone, home phone, etc.):

1. On your phone, press the **CALL FORWARD** button (silver button with right-pointing arrow and dot)

2. Scroll to **Set a forwarding destination**

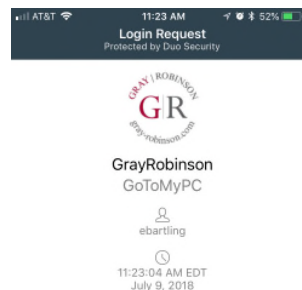3. Press the **OK** button

4. Enter the extension number or phone number where you would like to forward your calls; press **OK**.

   NOTE: To forward to another phone number, dial 9+area code+phone number; press **OK**.

The indicator light on your phone will remain on (red for staff phones, blue for attorney phones).

To cancel Call Forwarding:

Press the Call Forward button on your phone. The indicator light will turn off and your calls will ring at your extension.

*If you need assistance with this process, please call the **Help Desk** at **extension 6411**.*

OpenScape Mobile App - New Install ~ iPhone

1. Search for and download the **OpenScape** Mobile app.
2. Tap on **OPEN** to launch the application.
3. Tap **ACCEPT** for the End User License.
4. Enter your account credentials
   Subscriber: jdoe@system
   Server Address: http://osmo.gray-robinson.com
   Password: OpenScape web client password
   Cellular Number: Leave this field blank
5. Tap **SAVE**.

Your OpenScape Mobile app will now be connected to our server.

OpenScape UC WebClient – Initial Login Instructions

The OpenScape Unified Communication (UC) Application allows users to easily communicate with contacts, create conference calls and access important information. Whether you are in the office, working from home or traveling, the application will allow callers to easily reach you by utilizing "One Number Access."

To log in:

1. Open a web browser.
2. Enter the IP address: http://10.100.82.135:7789/tweb/login/login?getLoginDlg Press **Enter**.
3. Type in your **User name**.
4. Type in your network **password**.
5. Click **OK**.

   The first time you login, enter **Siemens1#** in the Password field. You will be prompted to change your password. The password you create must be at 12 characters long, must include capital and lower-case letters, must include at least one number and at least one special character (!@#$*).

You are now logged into the OpenScape UC WebClient application.

Changing Office Phone to Cell Phone

1. Open and login to OpenScape. You should find an icon for the OpenScape app on your desktop.

2. If this is your first time logging in, you need to program a device (e.g., your cell phone number). If not, skip to step 8.

3. To add your cell phone number to the application, click the **menu** option located in the upper right corner of the Openscape window.
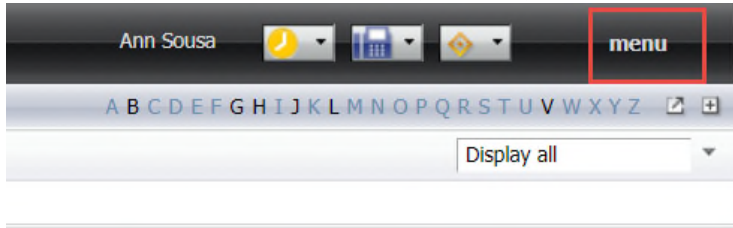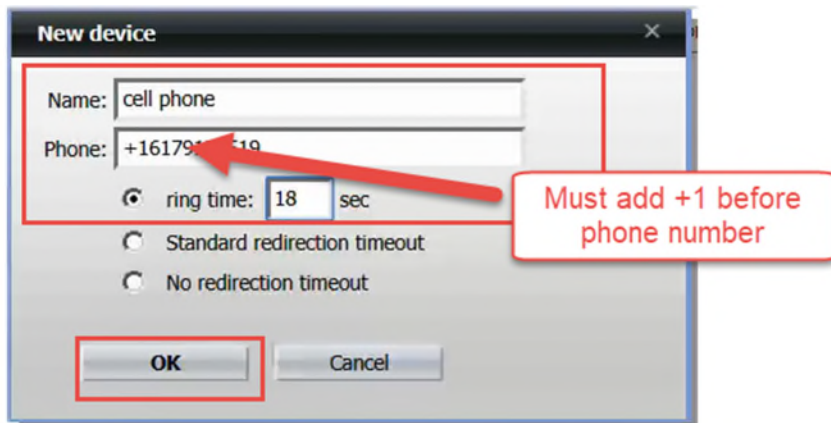

4. Click **General**.
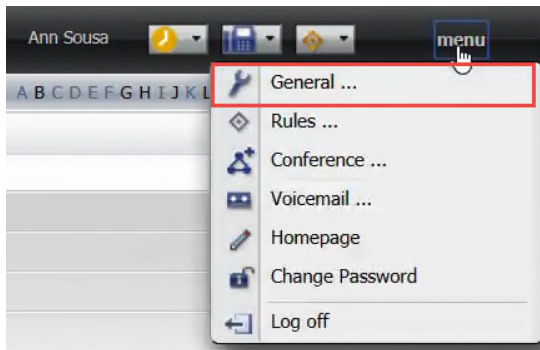
5. Click **Devices**. Click the **New** button to add a new device.
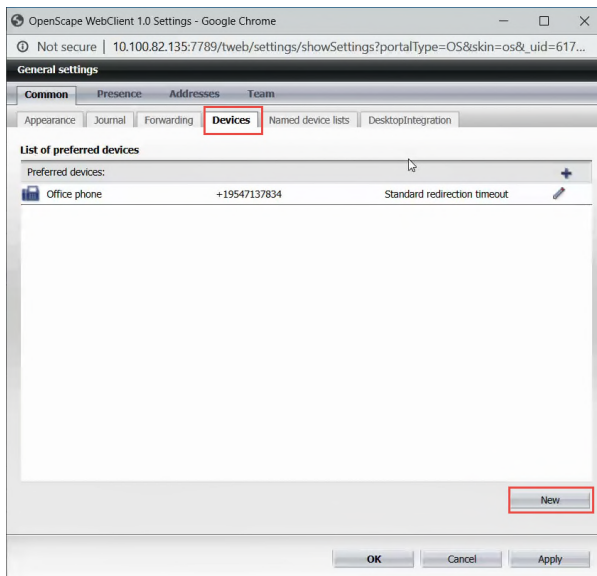
6. Within the New Device window, enter "cell phone" and your phone number (+1xxxxxxxxxx). Be sure to include a "**+1**" at the beginning. Change the ring time to 18 seconds if desired. Click **OK**

7. .Click **OK** to save your settings.
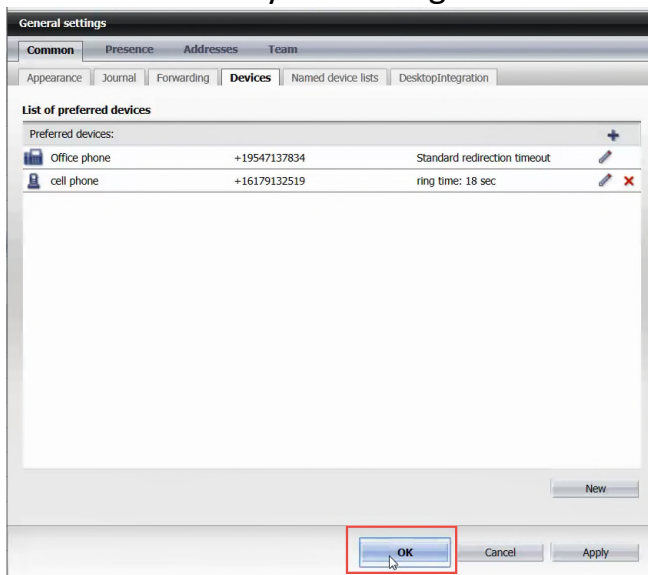
8. In the upper right corner of the screen, click the drop down arrow next to the phone icon. Select **Cell Phone**
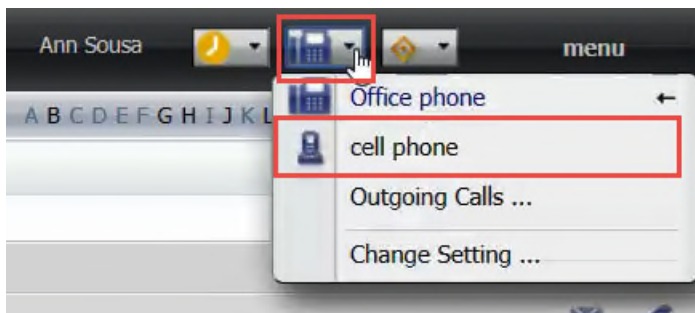
9. Your office phone should now be set to ring to your cell phone. Exit Openscape.

To Change Back to Office Phone

1. Open and login to OpenScape.

2. In the upper right corner of the screen, click the drop down arrow next to the phone icon.

3. Select **Office Phone**.

4. Your office phone should now be set to ring to your office phone. Exit Openscape.

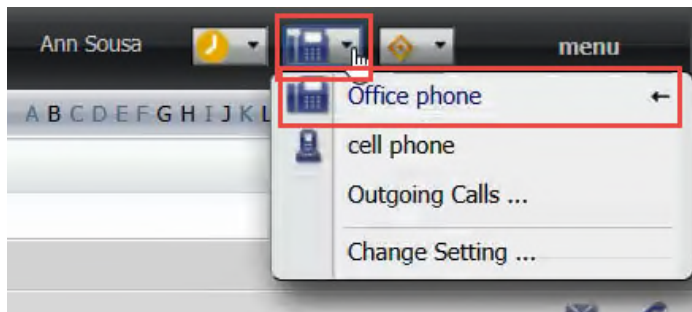# QR: Xpressions Voicemail Web Assistant

Accessing Xpressions Web Assistant

1. Open Xpressions by clicking the GR Xpressions icon on your desktop

    OR

2. Open Internet Explorer or Chrome.

3. Type the following URL in the web browser: **http://grexpressions**

4. The following login page will be displayed:

5. Enter your **mailbox number** (phone extension) in the User field.

6. Enter your **password** in the Password field (default password is your phone extension).

7. Click **Login**.

Recording and Editing Greetings

You can record and save your greetings and one name recording.

1. Select **Recordings** from the list on the left.

2. Click **Create** at the bottom of the page. The following page opens:

3. In the **Type of recording** section select the **Personal greeting** radio button.

4. In the **Recording** column click the down arrow to select the greeting you would like to record:

5. In the Select a method section, select **Record via telephone** now and click Create.

6. In the dialog box, enter the number of the telephone with which you want to record the greeting and click **OK**.
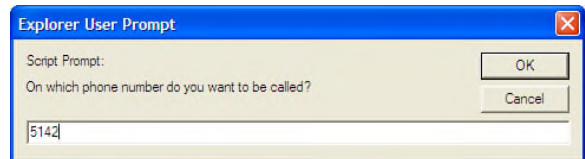
7. Your phone will ring, you can use your phone to start your recording. Click **Record** to start the recording. To end the recording, click **Pause**. You control the record and play features with the buttons that are now displayed in the browser window. You can record greetings, listen to them and delete them.

NOTE: Uncheck the **Refresh automatically** option before recording. The screen will stop "blinking" to make it easier to click the options.

QR: Xpressions Voicemail Web Assistant

Sample Greetings

When recording your personal greeting, please make sure to announce your first and last name. **If you are an assistant or paralegal, also state the name(s) of the individual(s) you assist. This will alleviate confusion when callers are sent to your Voicemail**. For example:

External:

Hello. You have reached the voicemail of [first name, last name}, [title, e.g., legal assistant to attorney(s) _____]. I am currently unavailable to answer your call. Please leave me your name, number and a brief message, and I will return your call as soon as I can. If you need immediate assistance, please dial "0" for the operator. Thank you.

Busy:

Hello. You have reached the voicemail of [first name, last name}, [title, e.g., legal assistant to attorney(s) _____]. I am currently on the other line, assisting another caller. Please leave me your name, number and a brief message, and I will return your call as soon as I can. If you need immediate assistance, please dial "0" for the operator. Thank you.

Internal:

HI! You have reached the voicemail of [first name, last name]. Leave your name and extension, and I will return your call as soon as I can. Thank you.

After Hours:

Hello. You have reached the voicemail of [first name, last name}, [title, e.g., legal assistant to attorney(s) _____]. The office is currently closed (or I have left the office for the day). Please leave me your name, number and a brief message, and I will return your call when I return to the office. Thank you.

Alternate Greeting (also referred to as vacation greeting):

Hello. You have reached the voicemail of [first name, last name}, [title, e.g., legal assistant to attorney(s) _____]. I am currently unavailable to answer your call. Please leave me your name, number and a brief message, and I will return your call as soon as I can. If you need immediate assistance, please dial "0" for the operator. Thank you.

Time Profile for the Simplified Greeting Configuration

These settings apply for all weekdays for which you have recorded the greetings.

The following dialog will open for the greeting configuration:

Once you have recorded the 4 main greetings and set your business hours, it will look like this:

Notification

1. Select **Notifications** from the list on the left. The first time that you open the Notification page, there are no existing notifications. You can activate an automatic notification (text message) for new incoming messages. The system will then inform you of new incoming messages.

List of notifications

Active message types for MWI LED

☐ E-mail
☑ Voice mails

Global notification settings

Notifications: ⦿ Disabled
○ Enabled

Notification options
Min. notification interval (in minutes): [5 ▼]

Notification list (disabled)
No notifications available. Please create a new one.

[Create notification]

[Save]

2. Click **Create notification**. A new page opens.

Notifications

Notification: 1
Name of notification: [_____]

Notification of new incoming messages
Message type   **Only if urgent**
☐ All messages   ☐
☐ E-mail   ☐
☐ Voice mails   ☐

Notification to the following devices
☐ [E-mail ▼] Number/address: [_____] [If fails]

[Add additional device]

Time dependency
Time ranges (hour : minutes)   **Days**
from [12:00am] to [12:00am]   ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun
                              ☐ Weekdays (Mon-Fri) ☐ Every day (Mon-Sun)

[Add additional time range]

[Save] [Back]

3. Name the notification. (ex. SMS Text)

4. In the **Notification of new incoming messages** area, you can select the message type for which you want to receive notification. Select Voicemails (notification of new "voicemails" only)

    You can also define whether you only want to be notified of new messages that are marked "urgent" (**Only if urgent** option).

5. In the **Notification to the following devices** area, enable the device selection by clicking the check box on the left side. The adjacent list field is now enabled.

6. In the list field, select the device to which the notification should be sent. (E-mail (notification via E-mail or SMS Text Msg)

    Here are SMS Text address for most popular providers:

AT&T	cellnumber@txt.att.net
Verizon	cellnumber@vtext.com
T-Mobile	cellnumber@tmomail.net
Alltel	cellnumber@message.alltel.com
Sprint	cellnumber@messaging.sprint.com
Sprint PCS	cellnumber@messaging.sprintpcs.com
Nextel	cellnumber@messaging.nextel.com

    (If the text address does not work for your phone, please check with your cell phone provider for the text address for your phone.)

7. If you would like to send a notification to another device, click the **Add additional device** and repeat from step 4.

8. When you have defined several notifications you can activate or deactivate them with a click in the corresponding check box. If the check box is activated, the corresponding notification is enabled.

9. In case there is an error in sending a notification to the selected device, you can define up to two alternative notification devices using the **If fails** button. In this case, a window opens in which you can select the notification devices in exactly the same way as described in step 4. Once you have configured the alternative devices, click the **Add** button to close the window. This opens a window in which you can save your settings by clicking **OK**.

10. In the **Time dependency** area, you can now define a time range in which the notification should take place. Click into the from: or to: field and enter a time range with the following syntax: Hour:Minutes (e.g. 08:00am or 8:00pm). In the Days area, you can activate the check boxes corresponding to the days on which you want to use the notification function.

    You can define additional time ranges via the **Add additional time range** button.

    The time ranges are processed sequentially. If you want to delete a defined time range, you must select it and then click **Delete time range**.

11. Once you have entered all the information for the notification function, confirm these entries by clicking **Save**.

12. The **Back** button takes you back to the notification function start page. The notification that you have created is now shown in the **List of notifications**.

NOTE: Selecting the option field next to each list entry, you can activate or deactivate the notification function for the corresponding notification. You can use the **Delete notification** to delete a selected notification.

13. If the notification you have just created is the first notification, you need to activate the notification feature first. For this, tick the **Enabled** check box in the **Global notification settings** section.

iTimeKeep is an easy-to-use Apple and Android app for time entry, which seamlessly integrates with Aderant for a better way to track billable hours. Just download the app, connect it to our system and start entering time; iTimekeep's intuitive design requires virtually no training.

Here is how to get started:

1. Call the Help Desk (ext. 6411) and request an iTimeKeep account.
2. You will receive an email once your name and credentials are added to the iTimeKeep database.
3. Download the iTimeKeep app and login using your credentials to begin tracking your time.
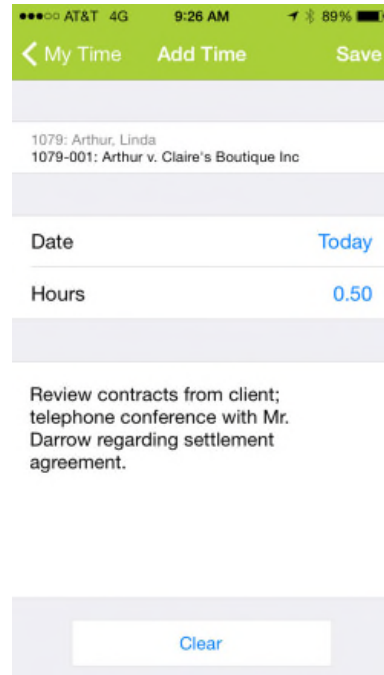
3 Easy Steps to Getting Started with iTimeKeep

1 DOWNLOAD iTimeKeep

Apple Store: >Click here

Google Play Store: >Click Here

From any Browser (PC or Mac): >Click Here

2 LOGIN with your credentials.

We will be sending your credentials via email shortly.

User ID (always your email)
Your Password

START entering your time.

Click on the **+** sign to add your first time entry.

3 SUBMIT your time, and it will immediately show up in Aderant.