

DOCKETING

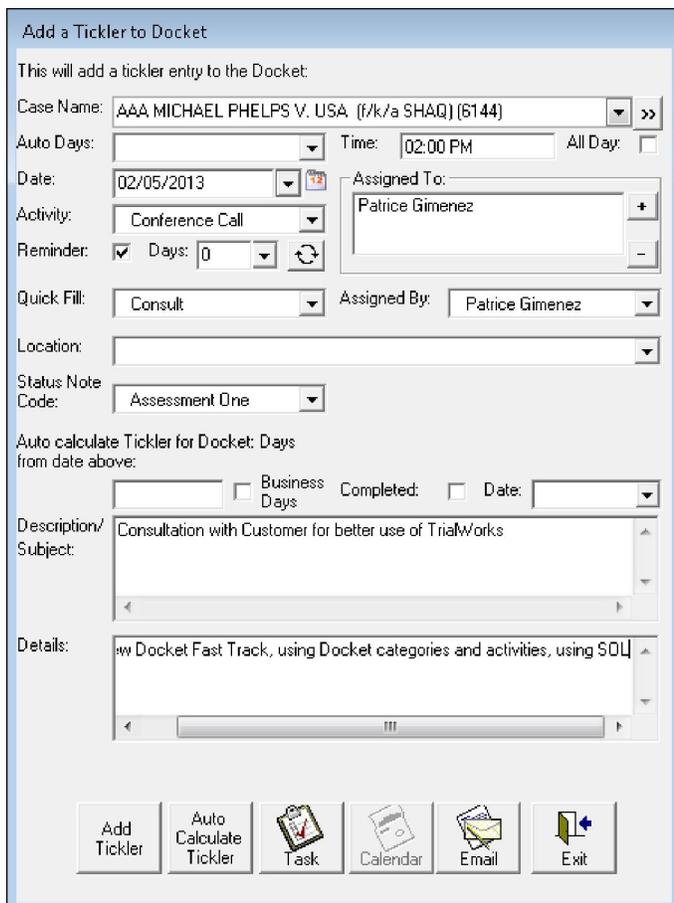
Keeping track of Due Dates or Deadlines in any case is easy in TrialWorks. Docketing can be integrated with your Outlook Calendar and invitations can be sent to other users easily.

Whether setting up client meetings or Trial Order dates TrialWorks can help automate the process for you. Due dates added to TrialWorks can have single or multiple reminders to make sure you and the attorneys are notified in plenty of time to prepare documents or ensure an on time appearance at a meeting.

Docket entries can be made from the Home Ribbon, the Docket Tab or by using the TWDocket button from any document/note or email tabs.

Add a Tickler to Docket

By Clicking on the Add to Docket Tickler from the Home Ribbon a user can create a due date for the current case or any other case by changing the Case Name.



The screenshot shows the 'Add a Tickler to Docket' dialog box. It contains the following fields and options:

- Case Name:** AAA MICHAEL PHELPS V. USA (f/k/a SHAQ) (6144)
- Auto Days:** (empty dropdown)
- Time:** 02:00 PM
- All Day:**
- Date:** 02/05/2013
- Assigned To:** Patrice Gimenez
- Activity:** Conference Call
- Reminder:** Days: 0
- Quick Fill:** Consult
- Assigned By:** Patrice Gimenez
- Location:** (empty dropdown)
- Status Note Code:** Assessment One
- Auto calculate Tickler for Docket: Days from date above:** Business Days
- Completed:** **Date:** (empty dropdown)
- Description/Subject:** Consultation with Customer for better use of TrialWorks
- Details:** wv Docket Fast Track, using Docket categories and activities, using SQL

At the bottom, there are six buttons: Add Tickler, Auto Calculate Tickler, Task, Calendar, Email, and Exit.

- **Auto Days:** Auto days can be created to help users calculate automatic due dates. This will auto-populate the *Auto Calculate Tickler for Docket Days from date above*. I.e., choosing Answer to Complaint-30 would add 30 days to the Auto Calculate Tickler for Docket Days from Date Above.

- **Date:** Defaults to current. This will be the due date deadline or the date of the event/appointment. You can change the date or use the Auto Days or Auto Calculate field.

- **Time:** Add a time of the time for your due date/event or check the box for all All Day event

- **Activity:** Using the Activity field can help locate specific due dates when viewing the Docket Tab. Activities options would be similar to Client Meeting, Hearing, Deposition, Conference Call, etc.

- **Reminder:** The checkbox for a reminder will allow the due date to appear on your daily Reminder List.

- **Days:** number of days before your due date that you want the reminder to appear on your



Reminder List. You can have a single reminder or multiple reminders. Leaving the default of “0” days will prompt the reminder to appear on the due date. Options for multiple reminders are Y/M/W/D (Year, Month, Week, Day) or 90/60/30/10/9/+.

- **Assigned To:** who is responsible for completing the due date/event. Click on the + for a list of users. You can pick more than one user but you should not pick all users working on the case. By default, the Attorney and Support assigned to the case are always able to see the due dates on a case. To limit your Due Dates and Reminders you want to assign one or two users to the individual due date. Docket Reports by Assigned To can be run from the Reports toolbar.

- **Quickfill:** Using the Quickfill options can auto-populate the Description of the due date. This can help your Descriptions to become consistent and easily searchable.

- **Assigned By:** The name of the originator of the due date. This should be used as the person creating the due date and not the assignment of a task by the attorney. Docket Reports by Assigned By can be run from the Reports toolbar.

- **Location:** The physical location of the appointment or hearing.

- **Status Note Code:** The status note code is automatically added to the Notes tab upon the completion of the Due Date

- **Auto calculate Tickler for Docket Days from date above:** Will calculate the due date by the number of days entered. (for example, entering 30 will calculate 30 days from the Date entered above.

- **Business Days:** Using the Auto Calculate Tickler but needing to only count Business Days (Monday through Friday excluding Holidays).

- **Completed:** If the Deadline has already been completed, indicate by checking the box.

- **Date:** The date the Deadline was completed.

- **Description/Subject:** Enter the description of what the due date is for. For Example, Hearing on Plaintiff’s Motion for Summary Judgment. Using the TWDocket button from any document tab will automatically populate the Description with the appropriate terminology for document follow-up or response to a pleading.

- **Details:** Details are more specific information necessary for attendance or follow-up on the Deadline. This field is transferred to the body of the Outlook Calendar Appointment.

Creating the Docket Entry

- **Add Tickler:** click the button called Add Tickler if the Date is the specific date you created the Deadline for.

- **Auto Calculate Tickler:** click the Auto Calculate Tickler Button if you need TrialWorks to calculate the Deadline date for you.