

Using the Production Tracker Tab

Version 11 and higher

Production Tracker allows users to classify, manage, and keep track of documents that have been produced **by your Firm** and those documents that have been produced **to your Firm**. It helps track what documents have been admitted into evidence, marked privileged or objected to by the opposing party. Additionally, Production Tracker provides users with the ability to keep track of ... and report on ... discovery items that have been reviewed by and are associated with specific witnesses and exhibits.

Production Tracker Tab Features:

The screenshot displays the 'Production Tracker' interface with the following sections:

- Detail Info:** Record ID: 19, Date: 1/24/2018, Item Type: Type of Document, To: Name of Expert Witness, To 1: Name of Fact Witness, Cc: Name of Other Person, From: Who Sent Record?, Source: Where is Record From?, Disc Request: ROG - 1st Set to Defendant, Question #: 14, Attachment: 2, Exhibit #: P-6, Hot Doc: checked, Doc Rcvd By: Defense counsel, Date Rcvd: 6/1/2018, Bates Stamp: ABC 12-345, Bate Code: ABC, Bate Number: 12 345.
- Links:** Hyperlink: ROGS-Ins-Defendant1, More: (empty), Add..., Edit..., Delete...
- Notes:** Redacted Description: ROGS - Insurance, Full Description: Insurance Interrogatories Addressed to Defendant, Notes: Defendants Objected to Q#14 regarding excess coverage.
- Items To Track:** What do I need to track? (Discovery Query: Excess coverage), Witness-Exhibit: (Witness: John Doe, M.D., Jane Doe, R.N.), Cc: (Fact Witness, Expert Witness), Names: (Person(s) identified in the document, Investigating Officer, Defendant, Plaintiff).

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Detail Info:

The Detail Information section prompts the user to enter detailed information about the document such as Record ID, Date, and Type. Let's review:

Detail Info	
Record ID:	19
Date:	1/24/2018
Item Type:	Type of Document
To:	Name of Expert Witness
To 1:	Name of Fact Witness
Cc:	Name of Other Person
From:	Who Sent Record?
Source:	Where is Record From?
Disc Request:	ROG - 1st Set to Defendant
Question #:	14
Attachment:	2
Exhibit #:	P-6
Hot Doc	<input checked="" type="checkbox"/>
Doc Rcvd By:	Defense counsel
Date Rcvd:	6/1/2018
Bates Stamp:	ABC 12-345
Bate Code:	ABC
Bate Number:	12 345

Record ID: This is an automatically-generated number that is database wide, meaning, it may <i>not</i> populate in numerical order.	Question #: Fill in the number of the discovery question that asks a particular question about which this document responds.
Date: Fill-in the date of the document.	Attachment: Fill in the number of <i>other</i> documents that support this particular document.
Item Type: This is a self-building field used to indicate what <i>is</i> this document? Is it a photograph? Accident Report? Tax Form?	Exhibit #: Fill in the number or alphanumeric identification of the document as it was submitted to the Court.
To: This is a self-building field used to identify to whom this record has been sent.	Hot Doc: Check this box if the document is considered extremely important to the case.
To 1: This is a self-building field used to identify to whom this record has been sent.	Doc Rcvd By: This is a self-building field used to identify from whom was the document received.
Cc: This is a self-building field used to identify to whom this record has been sent.	Date Rcvd: Fill-in the date the document was received.
From: This is a self-building field to identify from whom this record was sent.	Bates Stamp: Fill-in the bates stamp associated with the document. TrialWorks will automatically separate the Bate Code and Bate Number into the fields below.
Source: This is a self-building field used to indicate the party who sent this document.	Bate Code: See Bates Stamp.
Disc Request: This is a self-building field used to identify the document. For example, First Set of ROGs to Defendant or Second Set of RPDs to Plaintiff.	Bate Number: See Bates Stamp.



Notes:

The Notes section is used to further describe the document in summary or detailed fashion. Let's review:

Notes	
Redacted Description:	ROGS - Insurance
Full Description:	Insurance Interrogatories Addressed to Defendant
Notes:	Defendants Objected to Q#14 regarding excess coverage

Items to Track:

The Items to Track section

- **What do I need to track:** Enter keywords that describe this document.
- **Witness-Exhibit:** Enter the names of any witnesses contained in this document.
- **Cc:** Enter the names of person(s) who have received or had access to this document.
- **Names:** Enter the names of anyone else associated with this document.

Items To Track				
What do I need to track?	Witness-Exhibit:	Cc:	Names:	
Discovery Query Excess coverage	Witness John Doe, M.D. Jane Doe, R.N.	CC Fact Witness Expert Witness	Name Person(s) identified in the document Investigating Officer Defendant Plaintiff	

Check Boxes:

<input type="checkbox"/> Admitted
<input type="checkbox"/> Agreed to Admission
<input type="checkbox"/> Denied
<input type="checkbox"/> Exhibit
<input type="checkbox"/> Objected To
<input type="checkbox"/> Privileged

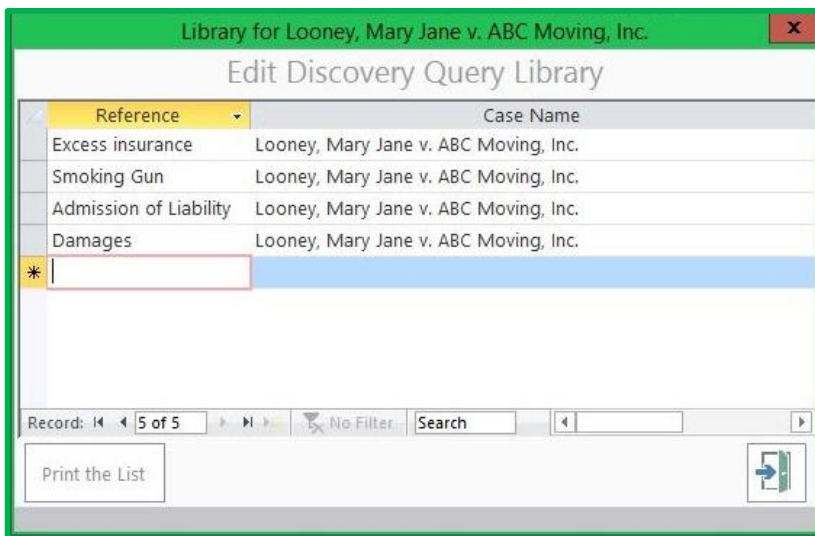
Use these check boxes to indicate whether the document has been admitted into evidence, agreed to admission, denied, used as an exhibit, objected to, or marked as privileged.



Links: The hyperlink is the main document. More links are used for any additional documents that are related to or in support of the original document.



Reporting > Discovery Query Library



Reference	Case Name
Excess insurance	Looney, Mary Jane v. ABC Moving, Inc.
Smoking Gun	Looney, Mary Jane v. ABC Moving, Inc.
Admission of Liability	Looney, Mary Jane v. ABC Moving, Inc.
Damages	Looney, Mary Jane v. ABC Moving, Inc.
*	

The Discovery Query Library is case-specific. Identify Reference terms that you will want to search when creating Discovery Reports (See, below.)



Reporting > Discovery Reports

Select Reference Query Terms from dropdown menus or type in the keyword descriptions, and click the button to run various reports:

TRACK # 1 or TRACK # 2 or TRACK # 3 or TRACK # 4	Accident Smoking Gun Admission of Liability Damages	Deser # 1 and Deser # 2 and Deser # 3 and Deser # 4	Liability
<input type="button" value="Track Report"/>		<input type="button" value="Discovery Search Report"/>	
<input type="button" value="Case Report"/> <input type="button" value="Production Report"/>	To: From: People: CC: Doc Type:	Name of Expert Witness Who Sent Record? Person(s) Identified in the document Expert Witness Accident Report	<input type="button" value="To Report"/> <input type="button" value="From Report"/> <input type="button" value="People Report"/> <input type="button" value="CC (I need to Track) Report"/> <input type="button" value="All CC Report"/> <input type="button" value="Doc type Report"/>
<input type="button" value="Exhibit Report"/> <input type="button" value="PRINT ALL EXHIBITS"/>	<input type="button" value="Witness Exhibit Report"/>	<input type="checkbox"/> Include Redacted <input checked="" type="checkbox"/> Include Description <input type="checkbox"/> Include ID and Bar Code <input checked="" type="checkbox"/> Include Privileged <input checked="" type="checkbox"/> Include Hot Docs	
John Doe, MD. States Code:	<input type="button" value="States Report"/>		

➤ TRACK REPORT:

TRACK # 1	Accident
or	
TRACK # 2	Smoking Gun
or	
TRACK # 3	Admission of Liability
or	
TRACK # 4	Damages
<input type="button" value="Track Report"/>	



➤ DESCRIPTION SEARCH REPORT:

Descr # 1	*liability
and	
Descr # 2	*
and	
Descr # 3	*
and	
Descr # 4	*

Description Search Report:

➤ DATE AND PRODUCTION REPORT:

Date Report
Production Report

➤ EXHIBIT AND PRINT ALL REPORT:

Exhibit Report	Print ALL Exhibits
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➤ ADDITIONAL REPORT:

To:	Name of Expert Witness	To Report
From:	Who Sent Record?	From Report
People:	Person(s) identified in the document	People Report
CC:	Expert Witness	CC (I need to Track) Report
		All-CC Report
Doc Type:	Accident Report	Doc type Report

➤ WITNESS / EXHIBIT REPORT:

John Doe, M.D.	Witness Exhibit Report
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➤ BATES REPORT:

Bates Code:		Bates #s:			Bates Report
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➤ FILTERS:

<input type="checkbox"/>	Include Redacted
<input checked="" type="checkbox"/>	Include Description
<input type="checkbox"/>	Include ID and BarCode
<input checked="" type="checkbox"/>	Include Privileged
<input checked="" type="checkbox"/>	Include Hot Docs

