LEVEL 1 USER TRAINING

HOUR 7 (ONLINE)

**GETTING STARTED WITH TRIALWORKS**

# Docketing

Timetable of Scheduled Events and Tasks related to a specific case; enter data directly into this tab and send it to your Calendar. Reports detailing completed and pending activity

## Basics

* How to enter a docket tickler and push to Outlook
* Setting reminders and recurring reminders
* Using Assigned To (Required/Not Required)
* Marking items dismissed or completed
* Marking Adjourned
* Reminders, Global Docket and TrialWorks Today

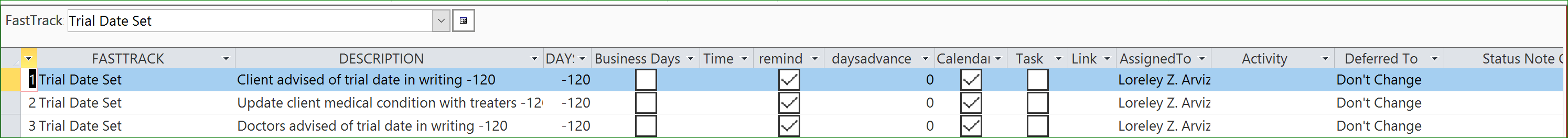
## Outlook Bi-Directional Sync

* Calendar from Outlook and push to Docket Tab
  + Enter description, add recipients, date/time and additional details then click File to TrialWorks

## Automated Docketing

* Templates
* Document Detail Windows

## Fast Track



* Name the Fast Track
* Description (what you want to show as the description in the Docket Detail window)
* Days (how many days from the initiation date should the entry be added to the Docket)
* Business Days (calculate only M-F excluding Holidays)
* Time (if there should be a time associated with the docket entry)
* Reminder (if you want the item to show up on your Reminder List)
* DaysAdvance (if you want the Reminder to show up a certain number of days in advance of the due date)
* Calendar (to add the item to the Outlook Calendar)
* Task (to add the item to the Outlook Task)
* Link (if the item should be dependent on the completion of a previous item)
* Assigned To (if the item should be assigned to a particular individual for the responsibility of completing the entry)
* Activity (a term from the Docket Category/Activity Library to help sort entries on the Docket Tab)
* Deferred (if the item falls on a Saturday or Sunday whether to move the date to Friday, Monday or Don’t Change)
* Status Note Code (when does it get added)

## Applying a Fast Track

* Date to apply from
* Add Fast Track
* Add Calendar
* Add Task
* Automatically Send
* Editing before adding

## Re-Applying a Fast Track

* Unapplied Items

## Automating Fast Track

* Linked to Liability