

# Using the TrialWorks Docket Tab

Version 11 and higher

The Docket Tab is used to track any tasks with a date and time AND any tasks that are deadline-oriented. The Docket Tab syncs with Outlook, offering the ability to modify entries in either program.

## Initial Settings

Before you get started, check the Firm's default settings:

- Global Settings > Other Settings - Below are default settings we recommend selecting:

Firm Settings	TW Registration / Upgrades
Settlement Calculator	Formatting
Other Settings	
Firm Options: Firm Specific: [ ]	
Docket Options: <input checked="" type="checkbox"/> Docket Reminder <input type="checkbox"/> Docket Prompt - Motions <input checked="" type="checkbox"/> Hide User Name From Docket Assigned To/By Dropdown <input type="checkbox"/> Create Task Item instead of Calendar when Adding to Docket <input checked="" type="checkbox"/> Enforce Docket Assigned To <input checked="" type="checkbox"/> Show Add to Tickler <input checked="" type="checkbox"/> Use Initials For Docket Assigned To Include Assigned To In Calendar Subject: [Include Initials (Beginning)]	
SQL Options: <input checked="" type="checkbox"/> Automatically Add a 90 Day Statute For All New Cases	
Defer Calculated Dates to: Default State for Workers Co	
Archive DB Options: Server/DB: [ ] Location: [ ] Outlook Folder: [ ]	
<input type="checkbox"/> Compile TW on startup <input type="checkbox"/> Use PCDocs <input type="checkbox"/> Use JCNo <input checked="" type="checkbox"/> Use Numeric Tab Numbers <input type="checkbox"/> Add Link to Pleadings Tab	

**Docket Reminder** will automatically turn on the reminders check box for all docket entries

**Hide User Name from Docket Assigned To/By Dropdown** hides users author name (full name) from docket assigned to/by dropdown. This should be used if you use docket assigned to/by values other than users full name. For example, the initials (JAS) or first letter of first name followed by last name (JSmith).

**Enforce Docket Assigned to** so that every docket assignment has a user assigned to that task or appointment. In doing so, users will *not* be able to create a docket entry without assigning it to someone.

**Show Add to Tickler** makes docket detail window appear when generating a document from a template that has automated docket linked to template

**Use Initials For Docket Assigned To** will use users initials for docket assigned to when creating calendar items directly from Outlook and tagging to a TrialWorks case.

We also recommend that you make a selection for "Include Assigned To in Calendar" so that the Firm's Outlook calendar entries will identify the person(s) assigned to the appointment or task.

Next, check the User's default settings:

# TRIALWORKS

Tel 305.357.6500 1550 Madruga Ave, Ste 508  
Fax 305.357.6499 Coral Gables, FL, 33146

[TrialWorks.com](http://TrialWorks.com)  
[Training@TrialWorks.com](mailto:Training@TrialWorks.com)



- User Tools > Default Values > User Settings and Help:

The screenshot shows the 'User Settings and Help' tab. The 'Behavior Settings' section is highlighted with a red box, containing the following options:

- ☒ Enable Reminders on Startup
- ☐ Disable Current Tab Icon

We recommend selecting “Enable Reminders on Startup” so that users will see docket assignments automatically upon launching TrialWorks.

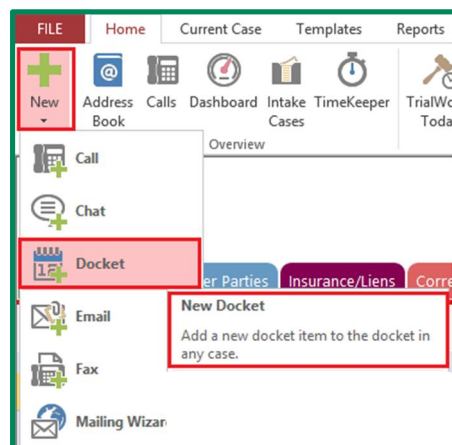
The screenshot shows the 'Calendar and Contact Settings' tab. The 'Invite Parties' section is highlighted with a red box, containing the following options:

- ☒ Enable Invitations:

We recommend that you turn on enable invitations and insert email address in invite parties of those contacts that always need invited to every calendar item

## Creating a New Docket Entry from the Docket Tab or New Button

Users may create a new docket entry from both the Docket Tab button at the bottom of the screen and from the New Button:



## Docket Entry Features:

**Case Name** field allows users to select the case from a dropdown menu.

**Date** field offers a calendar that may be selected to choose a specific date. Clicking in this field will also launch “Auto Days” (discussed below.)

**Time** field allows users to choose a specific time of day or create an “All Day” event.

**Activity** field is used to identify the type of event being scheduled from the Firm library of Docket Activities.

**Reminders** field allows users to set reminders for docket entries. (Reminders and recurring reminders discussed in greater detail below.)

**Quick Fill** field allows users to select from a Firm library of predefined language for a particular activity, which auto-fills the Description/Subject field. This is used for uniformity and consistency across the Firm.

**Status Note** field allows users to select from Firm library of notes associated with the activity that will auto-populate the Note Tab upon completion.

**Location** field is used to provide an address for the scheduled event.

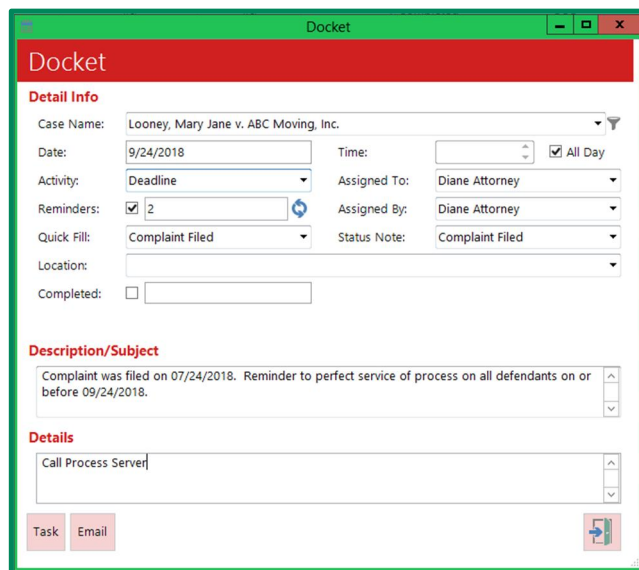
**Completed** field is marked by checking the box on the date the activity is completed. The date of completion will be recorded in TrialWorks.

**Assigned To** field identifies the user responsible for the docket item.

**Assigned By** field identifies the user who assigned the docket item.

**Description/Subject** field allows the user to provide information related to the scheduled event.

**Details** field is used for additional information related to the scheduled event.

The screenshot shows the 'Docket' entry form. At the top is a red header bar with the word 'Docket' in white. Below this is a section titled 'Detail Info' in red. It contains several fields: 'Case Name' (a dropdown menu showing 'Looney, Mary Jane v. ABC Moving, Inc.'), 'Date' (a date picker showing '9/24/2018'), 'Time' (a time picker with an 'All Day' checkbox), 'Activity' (a dropdown menu showing 'Deadline'), 'Assigned To' (a dropdown menu showing 'Diane Attorney'), 'Reminders' (a checkbox checked and a number '2' in a box), 'Assigned By' (a dropdown menu showing 'Diane Attorney'), 'Quick Fill' (a dropdown menu showing 'Complaint Filed'), 'Status Note' (a dropdown menu showing 'Complaint Filed'), 'Location' (a text box), and 'Completed' (a checkbox). Below 'Detail Info' is a section titled 'Description/Subject' in red, containing a text area with the text 'Complaint was filed on 07/24/2018. Reminder to perfect service of process on all defendants on or before 09/24/2018.' Below that is a section titled 'Details' in red, containing a text area with the text 'Call Process Server'. At the bottom right of the form are two buttons labeled 'Task' and 'Email'.

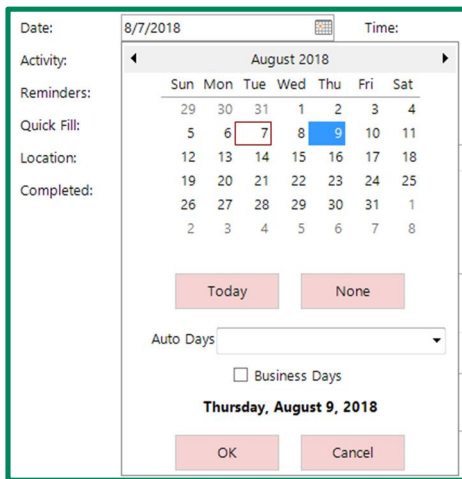
Once all the fields are selected for the new docket entry, users may also choose to click the Task and/or Email buttons to send the entry to Outlook.

Upon closing the door to finish the Docket Entry, user will be asked whether to send the docket entry item to Outlook calendar. Choose “Yes” if the item has a date and time associated with it. Choose “No” if the item is a deadline or task.



## Auto Days

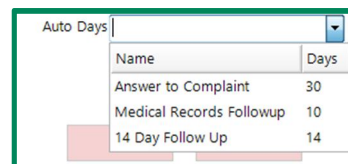
Auto Days allows the Firm to create common Due Dates and Deadlines based on Firm practice or jurisdictional requirements. TWAdmins establish the Auto Days by going to Settings > Auto Days.



Click in the **Date** field to view the calendar icon. Click the icon to fully open the calendar.

Choose the calendar date from which you want to calculate the due date or deadline.

Select the Auto Days from the Firm's Auto Days library, or, type the number of days until the deadline directly in the field.



Name	Days
Answer to Complaint	30
Medical Records Followup	10
14 Day Follow Up	14

## Reminders and Multiple ("Recurring") Reminders

Setting **Reminders** on the Docket Tab Entry is an important function, when you need some lead-time to perform a task or prepare for an appointment!

Setting Reminders for appointments and tasks in TrialWorks ensures that users receive notifications of upcoming events and deadlines.



**Docket**

**Detail Info**

Case Name: Looney, Mary Jane v. ABC Moving, Inc.

Date: 9/24/2018 Time: ☐ All Day

Activity: Deadline Assigned To: Diane Attorney

Assigned By: Diane Attorney

Reminders: ☒ 2

Quick Fill: Complaint Filed Status Note: Complaint Filed

Location:

Completed: ☐

**Description/Subject**

Complaint was filed on 07/24/2018. Reminder to perfect service of process on all defendants on or before 09/24/2018.

**Details**

Call Process Server

Task Email

Setting a Single Reminder - When a Reminder is set to "0" (zero,) the reminder appears on the due date. If the reminder is set to "1" (one,) the reminder appears on the day prior to the due date. If the reminder is set to 2, 5, 10, 20, 30, etc., the reminder appears on that number of days in advance of the actual deadline.

**Docket**

**Detail Info**

Case Name: Looney, Mary Jane v. ABC Moving, Inc.

Date: 9/24/2018 Time: ☐ All Day

Activity: Deadline Assigned To: Diane Attorney

Assigned By: Diane Attorney

Reminders: ☒ 2

Quick Fill: Complaint Filed Status Note: Complaint Filed

Location:

Completed: ☐

Setting Multiple ("Recurring") Reminders - User may also set multiple reminders for a single docket entry. This is particular useful for Statute of Limitations (SOLs) reminders, where the User wants reminders at one-year, six-month, one-month, 30 days, etc. intervals, until the task is completed.

Reminders: ☒ 0

Quick Fill:  Year/Month/Week/Day

Location:  90/60/30/10/9+

Completed: ☐ Multiple...

Click on the circular reminder icon to make your selection:

- Year/Month/Week/Day
- 90/60/30/10/9+
- Multiple

Choosing "Multiple" from the default options allows the user to create their own recurring reminders sequence.

Reminders: ☒ 0

Quick Fill:  Days  Dismiss ☐

Location:

Completed: ☐

180 ☐

90 ☐

45 ☐

30 ☐

10 ☐

9 ☐

8 ☐

7 ☐

6 ☐

**Description/Subject**

**Details**

OK Cancel

In the blank field, enter the number of days *before* the due date when you would like to be reminded of the event. Press enter and proceed to enter the next blank field until you've completed the sequence. Press "ok" when completed.

Complete the [New Docket Entry](#), and when you close the door you will be establishing these custom [recurring reminders](#). These reminders will appear on the [Reminders](#) screen each morning before the actual due date.

**Reminders**

Filters: Atty/Support: DLD ☐ Limit by Assigned To Only

Show: Both (Active and Intake Cases)

Dismiss	Completed	Case Name	Date	Time	Days	Description	Assigned
<input type="checkbox"/>	<input type="checkbox"/>	Looney, Mary Jane v. ABC	5/12/2018		30	Demand/Offer	DLD
<input type="checkbox"/>	<input type="checkbox"/>	Looney, Mary Jane v. ABC	7/13/2018		5	Trial date is next week	DLD; Firm; K
<input type="checkbox"/>	<input type="checkbox"/>	Looney, Mary Jane v. ABC	7/13/2018	9:00 AM	0	Complaint was filed today. Reminder to per	DLD
<input type="checkbox"/>	<input type="checkbox"/>	Civil Litigation Case	7/24/2018		20	SOL deadline is 07/24/2018	DLD S
<input type="checkbox"/>	<input type="checkbox"/>	Purple, Diane	7/28/2018	11:00 AM	20	Meeting with new client	DLD
<input type="checkbox"/>	<input type="checkbox"/>	Purple, Diane	8/7/2018	8:00 AM	30	Received signed fee agreement back	DLD
<input type="checkbox"/>	<input type="checkbox"/>	Purple, Diane	8/11/2018		30	Engage investigator to document defect anc (All)	F



*Hint:* If you would like multiple recurring reminders like this to be a more permanent setting, go to Global Settings > Formatting > **Reminder Style**, and choose to have *every docket* include a year/month/week/day reminder, or just your SOL's!

The screenshot shows the 'Formatting' tab in the 'Global Settings' window. The 'Reminder Style' dropdown menu is highlighted with a red box and is set to 'Automatic [SOL Only]'. Other visible settings include 'Auto File Numbering' (Incremental), 'Intake Cases' (Year Specific), and 'Style and Formatting Options' (Phone # Format: (###) ###-####, Default File As: Last, First Middle).

Finally, if you like even *more* reminders, send the **New Docket Entry** to your Outlook Calendar and you should see a window appear for each reminder you've selected with the word "Reminder." Press "send" on each entry and Outlook will also provide reminder alerts prior to the due date.

## Date Info

The Date Info button at the bottom of the Docket Tab provides users the ability to enter multiple date entries and send them all to the TWDocket and/or Outlook calendar.

The screenshot shows the navigation bar at the bottom of the Docket Tab. The 'Date Info' button is highlighted with a red box. Other buttons include a green plus icon, 'Docket Report', 'Task', 'Calendar', 'Internal Email', and a red X icon.

The screenshot shows the 'Deadlines for this Matter' window. The 'Important Dates' section is visible, listing various legal deadlines such as 'Pretrial Conf. Date', 'Calendar Call', 'Mediation/Settlement', etc. At the bottom, the 'Send All Entries to Calendar' and 'Send All Entries to Task' buttons are highlighted with red boxes.

Print all entries from the Important Dates

Send All Entries to the Outlook Calendar

Send All Entries to Outlook Task

Send All Entries to TrialWorks Docket

Close the door when all dates have been entered





Important Dates may be printed...

### Important Dates

Looney, Mary Jane v. ABC Moving, Inc.

Pretrial Conf. Date:	8/31/2018	RJI:		Expert:	
Calendar Call:		Note Of Issue:		Lay Witness:	
Mediation/Settlement:	7/31/2018	Status:		Deposition:	
Arbitration:		Discovery:	9/13/2017	SI Motion:	
Trial Date:	11/14/2018	Discovery Cut Off:		Exhibits:	
Second Trial Date:		Case Management Conference:		Trial Brief:	
Date of Filing:		First Client Meeting:		Jury Instructions:	
Informational Stmt:		IME Completed:		Jury Inst/Sp. Verdict Deadline:	
Add'l Parties Joined:		Inform Court of Mediator:		Statement Of Case:	
Mediation Deadline:		Disp. Motions Scheduled:		Disp. Motions heard:	
Pltf. Experts Disclosed:	12/1/2017	Non-Disp. Motions Sch:		Non-Disp. Motions heard:	
Def. Experts Disclosed:	1/2/2018	Binding Arbitration Date:		Witness Exhibit Deadline:	
Appeal Date:		Motions To Umline:			

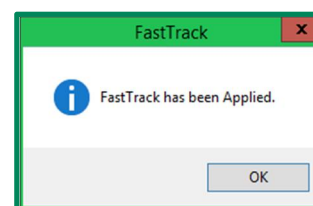
Important Dates are available in a Dashboard View for further use and distribution!

Dashboard Important Dates by Case									
Important Dates				All <input type="radio"/> My Views Only <input type="radio"/>		Case status ...		Attorney ...	
Case Name	File #	Case Status	Status	Sub Status	Liability	Pre-trial Conf. Date	Mediation/Settlement	Trial Date	
Civil Litigation Case	20160813	Open	Litigation	Complaint filed	Medical Malpra	3/5/2016	4/5/2016	10/8/2017	
Looney, Mary Jane v. ABC Moving, Inc.	20160815	Open	Initial Intake	Medical Record	Personal Injury	8/31/2018	7/31/2018	11/14/2018	
Parker, Penelope v. Parker, Paul	20160821	Open	Initial Intake	Family Law - Nc		6/24/2018	8/12/2018	12/14/2018	
Phillips, Robert v. Anderson, Aaron	03-000001	Open	PreSuit	InSuit	Personal Injury	1/30/2003	1/30/2003	4/23/2003	

## Automating the Docket Tab with FastTracks

FastTracks allows users to create common due date task/reminders to be added as a group to the Docket Tab of individual cases. To apply a new FastTrack, go to Current Case > Apply FastTrack.

Select the applicable FastTrack for your case, and click Apply FastTrack



The FastTrack applied will appear in the File Tab column.

Summary Clients Other Parties Insurance/Liens Correspondence Pleadings Discovery Docket Email History Ancillary Case Info Caption Contacts Costs Deposition Notes Witness Interview Hearings Documents										
Category/Activity: <input type="text"/>										
Date	Time	Description	Assigned By	Assigned To	Completed	Remind	Days	Days Left	File Tab	Activity
08/08/2018		Confirm all Internal Costs Entered in TW	Diane Attorney	Legal Secretary; Paralegal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0 1		FT:Settlement - PI	Settlement
08/08/2018		Confirm all External Costs Entered in TW	Diane Attorney	Legal Secretary; Paralegal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0 1		FT:Settlement - PI	Settlement
08/08/2018		Confirm whether Referral Fee is Due	Diane Attorney	Legal Secretary; Paralegal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0 1		FT:Settlement - PI	Settlement
08/07/2018		Send Settlement Conf to Attorney/Insur C/o Client	Diane Attorney	Legal Secretary; Paralegal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0 0		FT:Settlement - PI	Settlement
08/07/2018		Enter Final Settlement in Negotiations Tab	Diane Attorney	Legal Secretary; Paralegal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0 0		FT:Settlement - PI	Settlement

For additional information on using FastTracks in TrialWorks, please see "How to Create FastTracks."

