

MITR^TECH

TAP

Feature Notes

TAP Version: 1.2

Release Date: 1/28/2019

The logo for MITRATECH, featuring the company name in a white, sans-serif font. A thin blue vertical line is positioned between the 'R' and 'A' characters. The logo is set against a solid orange background that occupies the left and bottom portions of the slide. A large, stylized blue letter 'A' is partially visible on the right side of the slide, overlapping the orange background.

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Dashboard Enhancements

New dashboard icons & 'Start Workflow' change

1. Users now have three simple icons on their dashboards to represent saving views, adding columns to the dashboard grid, and exporting for ad-hoc reporting.
2. We've renamed the 'create' button 'Start Workflow.' This change brings clarity to the action the button performs.

--Select your workflow--

Start Workflow Accessibility View

4 of 5 columns



Actions	Workflow Name	Date Signed	Status	Stage Progress	Next Signe
...	Request # 00001831		Relationship 2	Not available	
...	Request # 00001830		Relationship 1	Not available	
...	Request # 00001829		Relationship 1	Not available	
...	Request # 00001828		Relationship 1	Not available	

UI Updates to the **Left Dashboard Drawer**

1. In order to rename or delete filters, users right click in line on the desired filter in the left hand dashboard drawer.
2. To collapse the left hand drawer, click the chevron icon highlighted in blue below.

The screenshot displays the dashboard interface. On the left, a dark grey drawer contains navigation options: 'All Records', 'My Records', and 'My Action Required'. Below these is a 'DEPARTMENT' section with a dropdown menu set to '--Select Department--'. The 'FILTERS' section is expanded, showing 'Contract Request:' with a sub-menu containing 'Rename Filter' and 'Delete Filter'. A blue chevron icon in the top right of the drawer is highlighted with a blue box. The main content area features a search bar, a workflow selection dropdown ('--Select your workflow--'), and buttons for 'Start Workflow' and 'Accessibility View'. A table with 6 columns (Actions, Workflow Name, Date Signed, Status, Stage Progress, Next Signer) displays 5 rows of data. The bottom of the page shows a pagination control with page numbers 1-10, an ellipsis, and a '75 items per page' dropdown, along with the text '1 - 75 of 1815 items'.

Actions	Workflow Name	Date Signed	Status	Stage Progress	Next Signer
...	Request # 00001831		Relationship 2	Not available	
...	Request # 00001830		Relationship 1	Not available	
...	Request # 00001829		Relationship 1	Not available	
...	Request # 00001828		Relationship 1	Not available	
...	Request # 00001827		Relationship 1	Not available	

Dashboard Grid Updates

1. Column headers are frozen and the dashboard now scrolls within frame so that users have improved visibility into records.
2. "Pinned filters" and "My Filters" are now combined under "Filters." Icons distinguish between the two.

The screenshot displays a dashboard interface with a sidebar on the left and a main grid area. The sidebar includes navigation options like 'All Records', 'My Records', and 'My Action Required', along with a 'DEPARTMENT' dropdown and a 'FILTERS' section. The 'FILTERS' section is highlighted with a red box and contains a list of filter categories: 'All Records', 'Contract Request: TAPSign', 'User default', and 'Sprint Review 12.10.18'. The main grid area features a search bar, a workflow selection dropdown, and buttons for 'Start Workflow' and 'Accessibility View'. Below these is a table with columns: 'Actions', 'Workflow Name', 'Date Signed', 'Status', 'Stage Progress', and 'Next Signe'. The table contains five rows of data, each representing a request with its ID, relationship type, and stage progress. At the bottom, there is a pagination control showing '1' selected, '75' items per page, and '1 - 75 of 1815 items'.

Search

--Select your workflow-- Start Workflow Accessibility View

4 of 5 columns

Actions	Workflow Name	Date Signed	Status	Stage Progress	Next Signe
...	Request # 00001831		Relationship 2	Not available	
...	Request # 00001830		Relationship 1	Not available	
...	Request # 00001829		Relationship 1	Not available	
...	Request # 00001828		Relationship 1	Not available	
...	Request # 00001827		Relationship 1	Not available	

1 2 3 4 5 6 7 8 9 10 ... 75 items per page 1 - 75 of 1815 items

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TeamConnect Integration Functionality Phase II

TeamConnect information in TAP forms

Users outside of TeamConnect can send dynamic text fields to TeamConnect via TAP

TeamConnect drop downs can be pulled into TAP forms

Users can search through TeamConnect records, contacts, and users within TAP forms

TeamConnect Versions
Supported: 4.2 through 6

Matter Intake Form

Welcome to the Matter Intake Portal. This form can be used as an easy way to input matters into TeamConnect. Please complete all required fields below, and the Smart Form will drive your request to the appropriate parties & outcome. You will be notified each step along the way.

Matter Name
Marbury vs Madison

Matter Description
Marbury v. Madison, 5 U.S. 137, was a U.S. Supreme Court case that established the principle of judicial review in the United States, meaning that American courts have the power to strike down laws, statutes, and some government actions that contravene the U.S. Constitution.

Security of this matter request should be restricted to:
Legal Dept Access

Single Document Upload to TeamConnect
Select files...
✓ Done
Outside Counsel Engagement Lett... 397.98 KB

Multiple Document Upload to TeamConnect
Select files...
✓ Done
Paterodactyls.jpg 6.60 KB
Pyapodactyls.jpg 7.89 KB
Redlined Document Example.pdf 50.05 KB
Sample NDA Document.pdf 88.10 KB

Jurisdiction
Colorado

TC Categories form item update options
× Bankruptcy × Chapter 11 × Chapter 7
× Chapter 13
✓ Bankruptcy
× Chapter 11
× Chapter 7
× Chapter 13
Contracts
Breach of Contract
Confidentiality Breach
Employment

TeamConnect Contact Search with First & Last
Search here...

TeamConnect Roles
-- Select one --

Areas Impacted

- ✓ Workflow Designer
- ✓ Form Designer

Users can route documents from TAP forms into TeamConnect e.g. contracts, evidence

TeamConnect categories can be displayed in TAP dropdowns

Setting up a **TeamConnect** integration in the **TAP** Designer

Users can route documents to TeamConnect within the workflow designer TeamConnect support modal. This functionality supports creating an ad hoc folder, as well as sending documents to an object's root folder and relative folders.

TeamConnect support

Attributes Options **Trigger Condition**

Label:

On TeamConnect error:

TeamConnect errors:

If missing result value:

On missing attachments:

*TeamConnect Versions Supported:
4.2 through 6*

Setting up a **TeamConnect** integration in the **TAP** Designer

Users can overwrite information sent to TeamConnect in previous stages by selecting the 'replace previously selected categories' drop down item in the TeamConnect support options tab.

TeamConnect support

Attributes Options Trigger Condition

Label:	<input type="text" value="Update 3"/>
On TeamConnect error:	<input type="text" value="Throw error"/>
TeamConnect errors:	<input type="text" value="Hide"/>
If missing result value:	<input type="text" value="Continue if not required"/>
Categories update:	<input type="text" value="Replace previously selected categories"/>
On missing attachments:	<input type="text" value="Continue"/>

*TeamConnect Versions Supported:
4.2 through 6*

Setting up a **TeamConnect** integration in the **TAP** Designer

Areas Impacted

✓ Workflow Designer

Categories can be displayed based on a user's previous selection. Configuration options allow predefined categories, hidden categories, and various parent/child presentations in the form.

The screenshot shows a configuration form with the following sections:

- Matter Name**: A text input field.
- Document Upload to TeamConnect Example**: A section with a blue "Select files..." button.
- Multi-file Upload to TeamConnect Example**: A section with a blue "Select files..." button.
- TeamConnect Contact Search with First & Last**: A search input field with a dropdown arrow.
- TC Categories form item update options**: A search input field with a dropdown arrow. Below it is a list of categories with checkboxes:
 - Bankruptcy
 - Chapter 11
 - Chapter 7
 - Chapter 13
 - Contracts
 - Breach of Contract
 - Confidentiality Breach
 - Employment

A blue arrow points from the text on the left to the "TC Categories form item update options" section. A blue "Submit" button is located at the bottom right of the form.

*TeamConnect Versions Supported:
4.2 through 6*

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Data Source Enhancements

Data Source Enhancements

Users can now export conditional data sources

Data Sources

Edit Conditional Data Source

Conditional Data Source Details

Data Source Name: *

Data Source Permissions

Assigning your data source to departments ensures security and access to data is limited to only members of the departments selected. You can add as many departments as you wish.

Data Source Departments: *

Enable Insert:

Conditional Data Source

[Export](#) [Upload Values](#) [Add Values](#)

Parent Values

Countries

Text	Value	Parent text
Afghanistan	Afghanistan	-
Åland Islands	Åland Islands	-

Child Values

US States

Text	Value
AK	AK
AL	AL

Data Source Enhancements

All save functionality for data sources exists at the bottom of the selected data source window. Additionally, data source descriptions have been deprecated to increase performance.

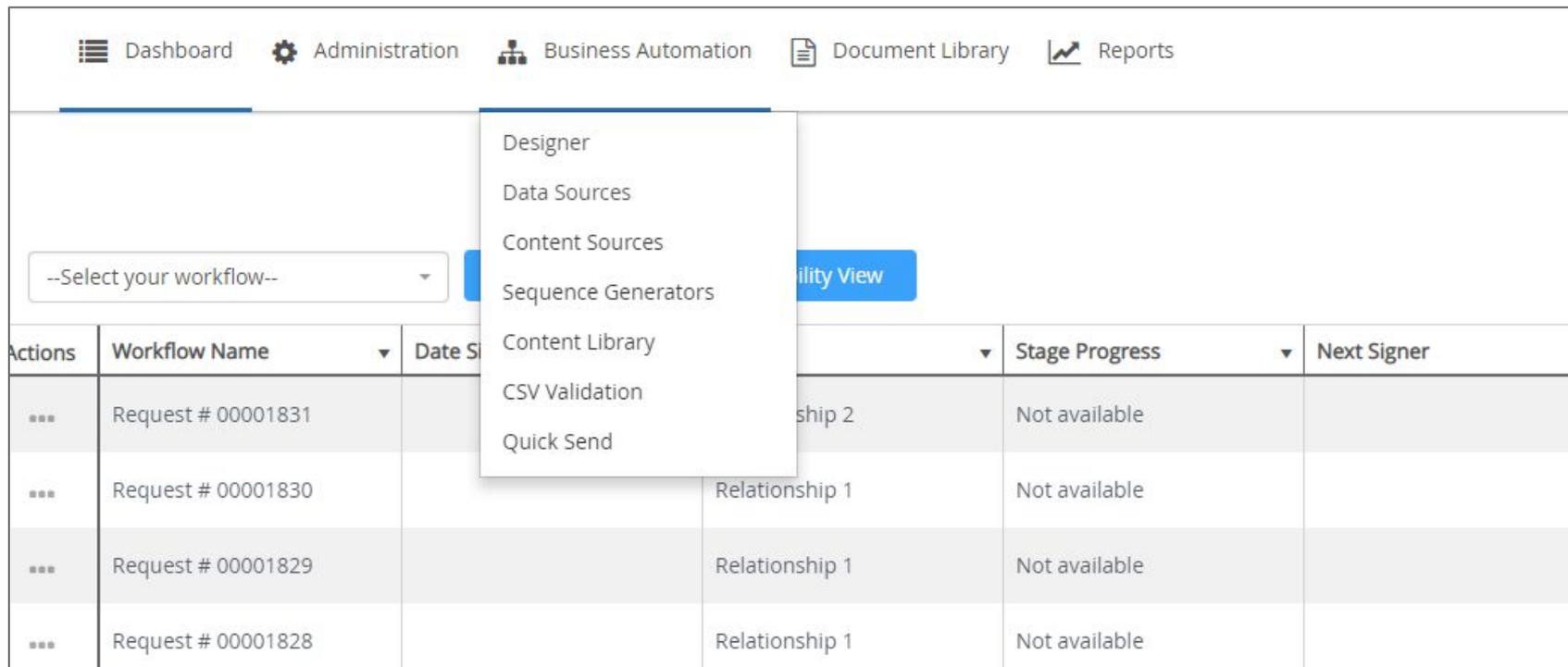
Countries	United States	AL
Countries	United States	AR
Countries	United States	AZ
Countries	United States	CA
Countries	United States	CO
Countries	United States	CT
Countries	United States	DE
Countries	United States	FL
Countries	United States	GA
Countries	United States	HI
Countries	United States	IA
Countries	United States	ID
Countries	United States	IL
Countries	United States	IN

1 2 3 4 1 - 15 of 50 items

[Save Data Source](#)[Cancel](#)

Removal of 'Create and Send'

Users will see the 'Quick Send' functionality located under business automation and 'MegaSign' located under the Document Library.



The screenshot displays a software interface with a top navigation bar containing the following items: Dashboard, Administration, Business Automation, Document Library, and Reports. The 'Business Automation' menu is open, showing a list of options: Designer, Data Sources, Content Sources, Sequence Generators, Content Library, CSV Validation, and Quick Send. Below the menu is a table with columns: Actions, Workflow Name, Date S, Stage Progress, and Next Signer. The table contains four rows of data, each with a 'Request #' and a 'Relationship' value. The 'Stage Progress' column for all rows is 'Not available'.

Actions	Workflow Name	Date S	Stage Progress	Next Signer
...	Request # 00001831		Not available	
...	Request # 00001830		Not available	
...	Request # 00001829		Not available	
...	Request # 00001828		Not available	

The logo for MITRATECH, featuring the word in a white, sans-serif font. The letter 'A' is stylized with a light blue diagonal bar passing through it.

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Additional Enhancements

Additional enhancements

- Alternative text support extends to radio buttons, drop-downs, and thank you pages
- TeamConnect integration functionality extends to TeamConnect Essentials matter types and sub-types
- TeamConnect contact search now includes first and last name search
- TeamConnect integration functionality now supports assigning a role to a primary assignee for the purpose of TeamConnect matter intake

Thank you!