

MITR^TECH

TAP

Feature Notes

TAP Version: 1.2

Release Date: 1/28/2019



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 links: 'All Records', 'My Records', and 'My Action Required'. Below these is a 'DEPARTMENT' section with a dropdown menu labeled '--Select Department--'. Further down is a 'FILTERS' section with a pin icon, 'All Records', and a 'Contract Request:' filter. A context menu is open over the 'Contract Request:' filter, showing 'Rename Filter' and 'Delete Filter' options. At the top of the drawer, a blue chevron icon is highlighted with a red box. The main content area features a search bar, a workflow selection dropdown labeled '--Select your workflow--', and buttons for 'Start Workflow' and 'Accessibility View'. Below these are icons for '5 of 5 columns', a save icon, a list icon, and a share icon. The main table has columns: 'Actions', 'Workflow Name', 'Date Signed', 'Status', 'Stage Progress', and 'Next Signer'. It contains five rows of data with request numbers and relationship types. At the bottom, there is a pagination bar with a left arrow, a right arrow, a page number '1' (highlighted with a red circle), and numbers 2 through 10, followed by an ellipsis and more arrows. To the right of the pagination bar is a dropdown for '75 items per page' and a text label '1 - 75 of 1815 items'.

Search

--Select your workflow-- Start Workflow Accessibility View

5 of 5 columns

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	

75 items per page 1 - 75 of 1815 items

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.

Dashboard interface showing a table of records. The table has 6 columns: Actions, Workflow Name, Date Signed, Status, Stage Progress, and Next Sign. The table is scrollable, and the column headers are frozen. The interface includes a sidebar with navigation links, a search bar, and a table with columns: Actions, Workflow Name, Date Signed, Status, Stage Progress, and Next Sign. The table is scrollable, and the column headers are frozen.

Search

--Select your workflow-- Start Workflow Accessibility View

4 of 5 columns

Actions	Workflow Name	Date Signed	Status	Stage Progress	Next Sign
...	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	

75 items per page 1 - 75 of 1815 items

DEPARTMENT

--Select Department--

FILTERS

All Records

Contract Request: TAPSign

User default

Sprint Review 12.10.18



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

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

Jurisdiction

Colorado

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

TeamConnect Contact Search with First & Last

Search here...

TeamConnect Roles

-- Select one --

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

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

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

Areas Impacted

✓ Workflow 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

AttributesOptionsTrigger Condition

Label:

Document Upload

On TeamConnect error:

Throw error

TeamConnect errors:

Show

If missing result value:

Continue if not required

On missing attachments:

Continue

Single Document Upload ...

Root object folder

Document

Please select description

Multiple Document Uploa...

Predefined folder

Memorandum Folder

Please select category

*TeamConnect Versions Supported:
4.2 through 6*

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

Areas Impacted

✓ Workflow 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

AttributesOptionsTrigger 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.

Matter Name

Document Upload to TeamConnect Example

Select files...

Multi-file Upload to TeamConnect Example

Select files...

TeamConnect Contact Search with First & Last

Search here...

TC Categories form item update options

Search here...

- ☒ Bankruptcy
 - ☐ Chapter 11
 - ☐ Chapter 7
 - ☐ Chapter 13
- ☐ Contracts
 - ☐ Breach of Contract
 - ☐ Confidentiality Breach
- ☐ Employment

Submit

*TeamConnect Versions Supported:
4.2 through 6*



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: *

US States Conditional

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: *

× Global

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 shows the top navigation bar with the following items: Dashboard, Administration, Business Automation, Document Library, and Reports. The 'Business Automation' menu is open, displaying a list of options: Designer, Data Sources, Content Sources, Sequence Generators, Content Library, CSV Validation, and Quick Send. Below the navigation bar, there 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'.

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	

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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!