MITRATECH

TAP

Feature Notes

TAP Version: 1.2

Release Date: 1/28/2019

MITRATECH

Dashboard Enhancements

Areas Impacted

✓ Dashboard

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

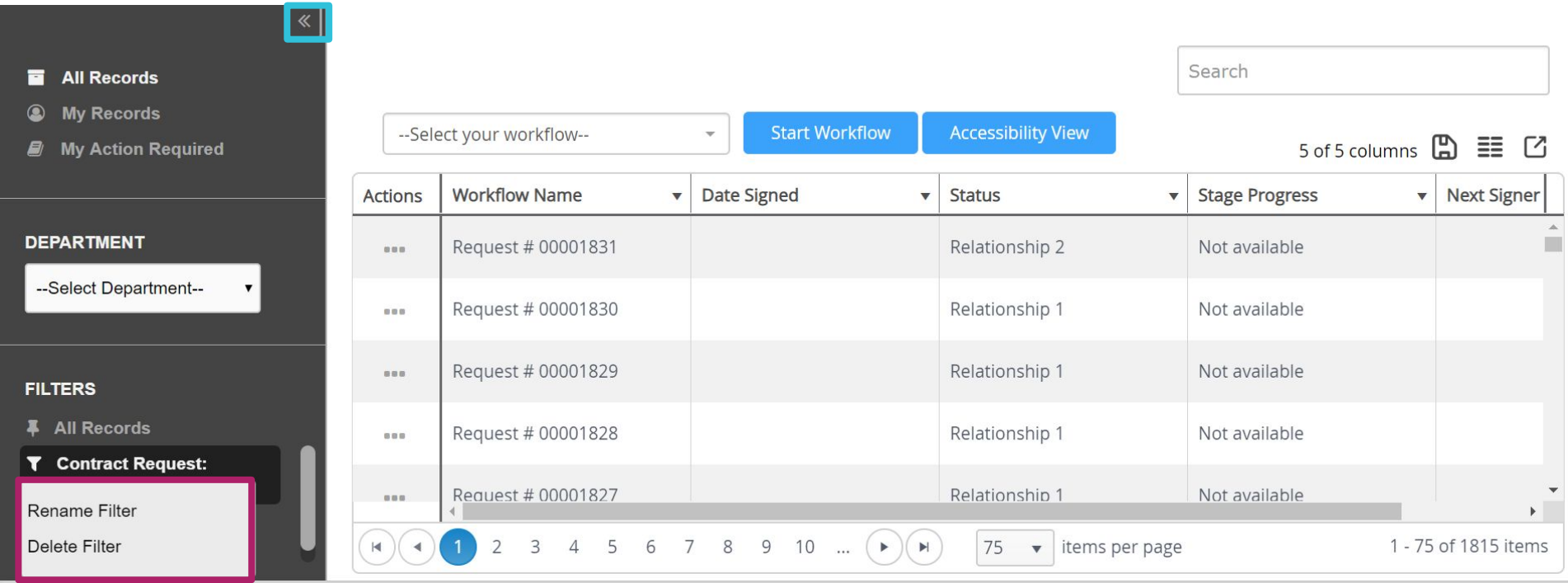
Actions	Workflow Name	Date Signed	Status	Stage Progress	Next Signe
•••	Request # 00001831		Relationship 2	Not available	
•••	Request # 00001830		Relationship 1	Not available	
•••	Request # 00001829		Relationship 1	Not available	
•••	Request # 00001828		Relationship 1	Not available	

Areas Impacted

✓ Dashboard

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.

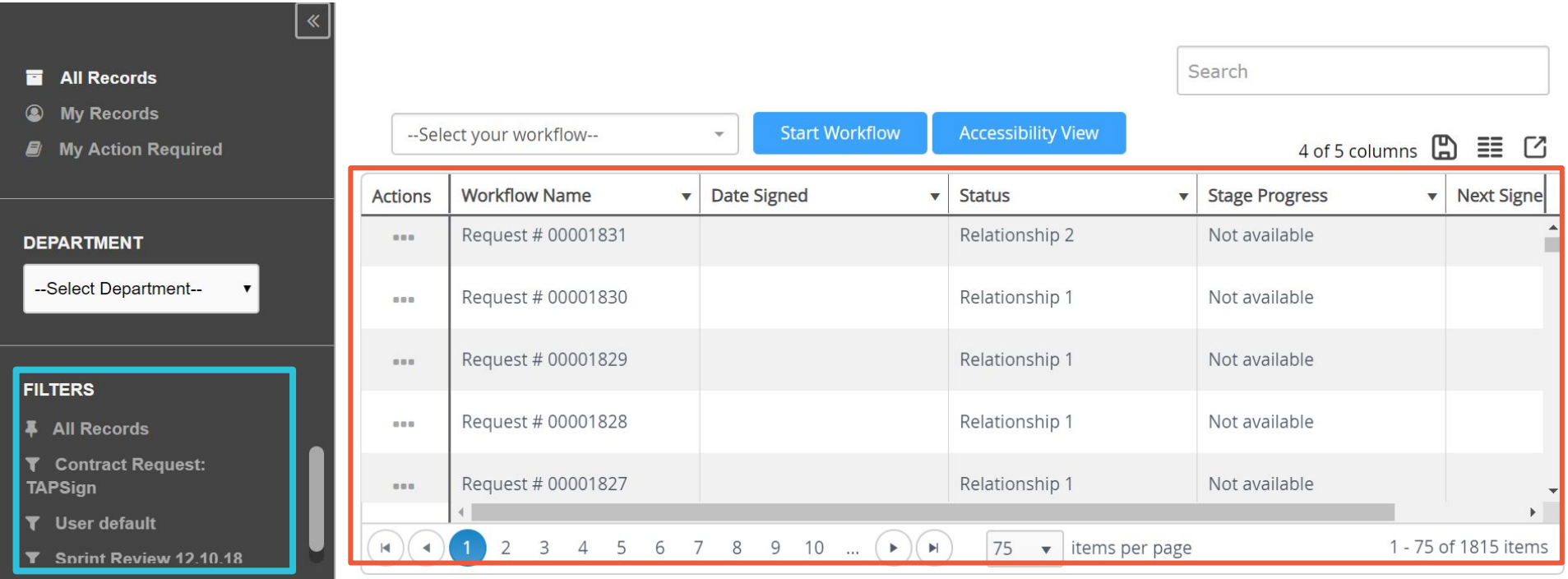


Areas Impacted

✓ Dashboard

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.



MITRATECH

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

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

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

Sub

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

TeamConnect categories can be displayed in TAP dropdowns

Areas Impacted

- ✓ Workflow Designer
- ✓ Form Designer

TeamConnect Versions Supported: 4.2 through 6

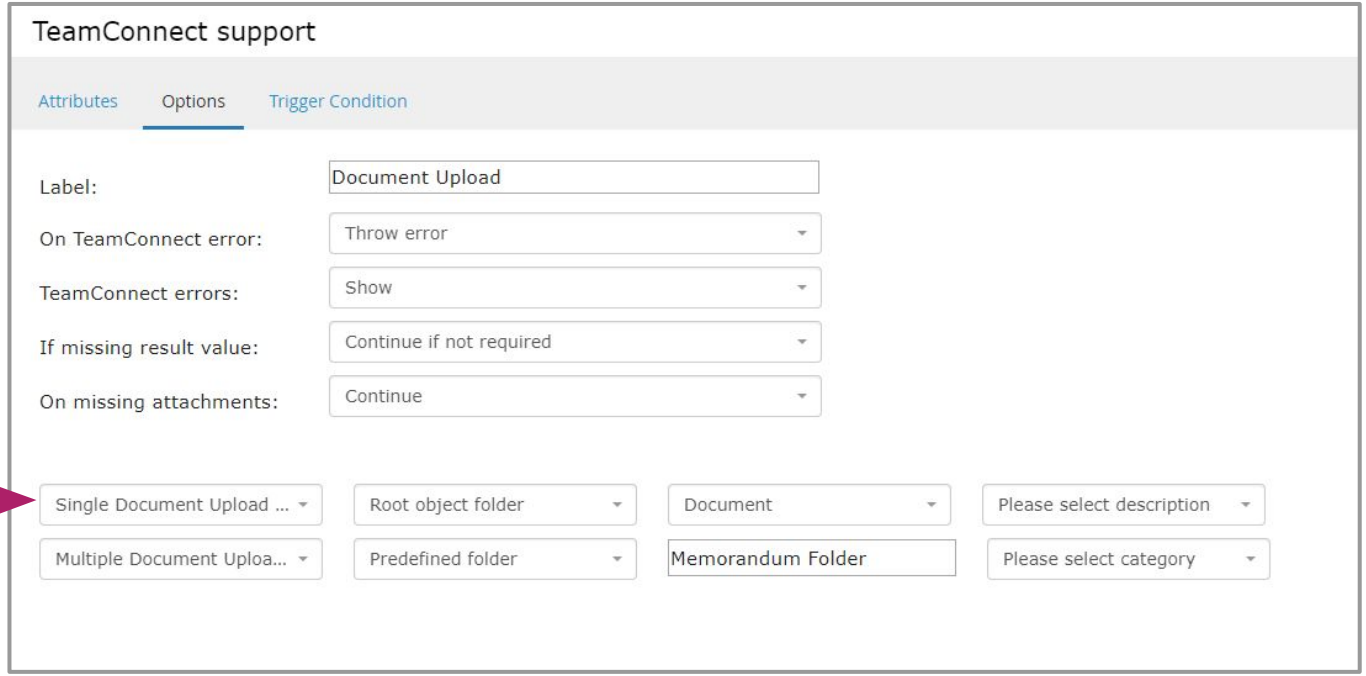
MITRATECH

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.



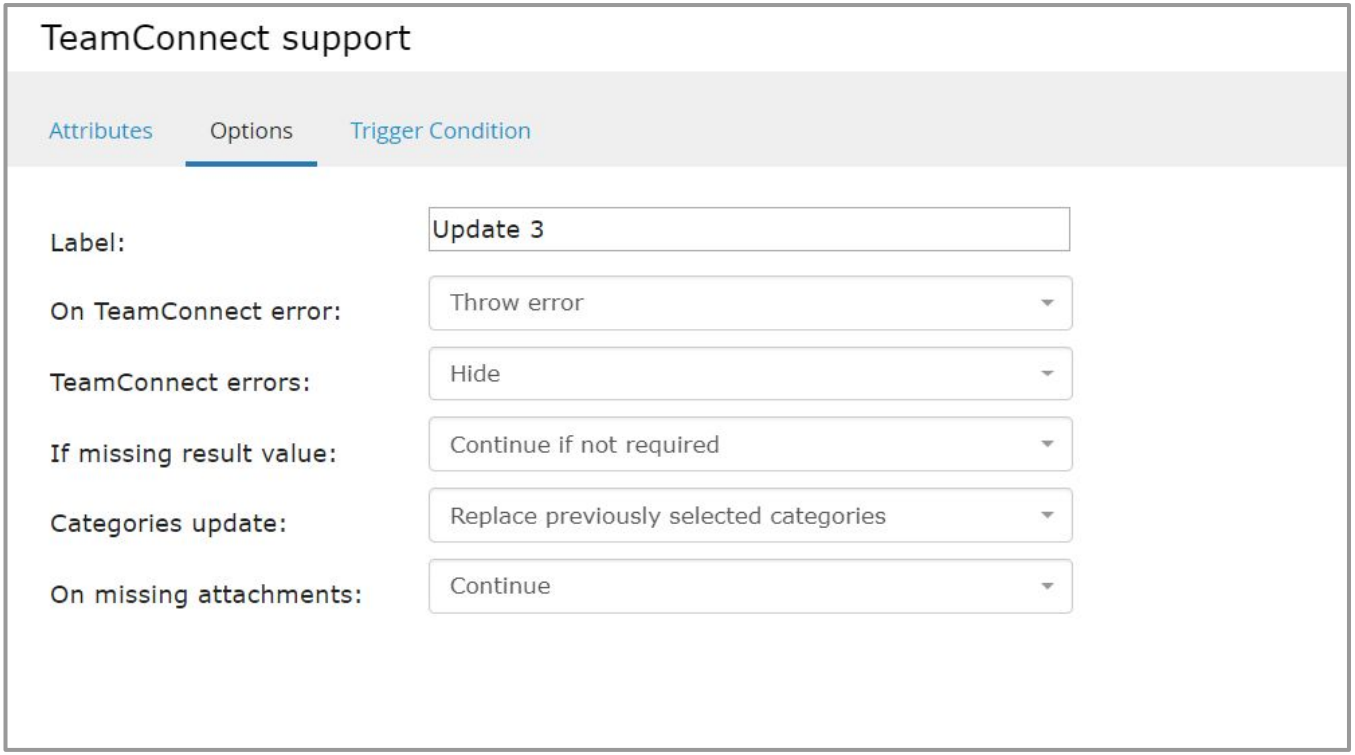
TeamConnect Versions Supported: 4.2 through 6

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.



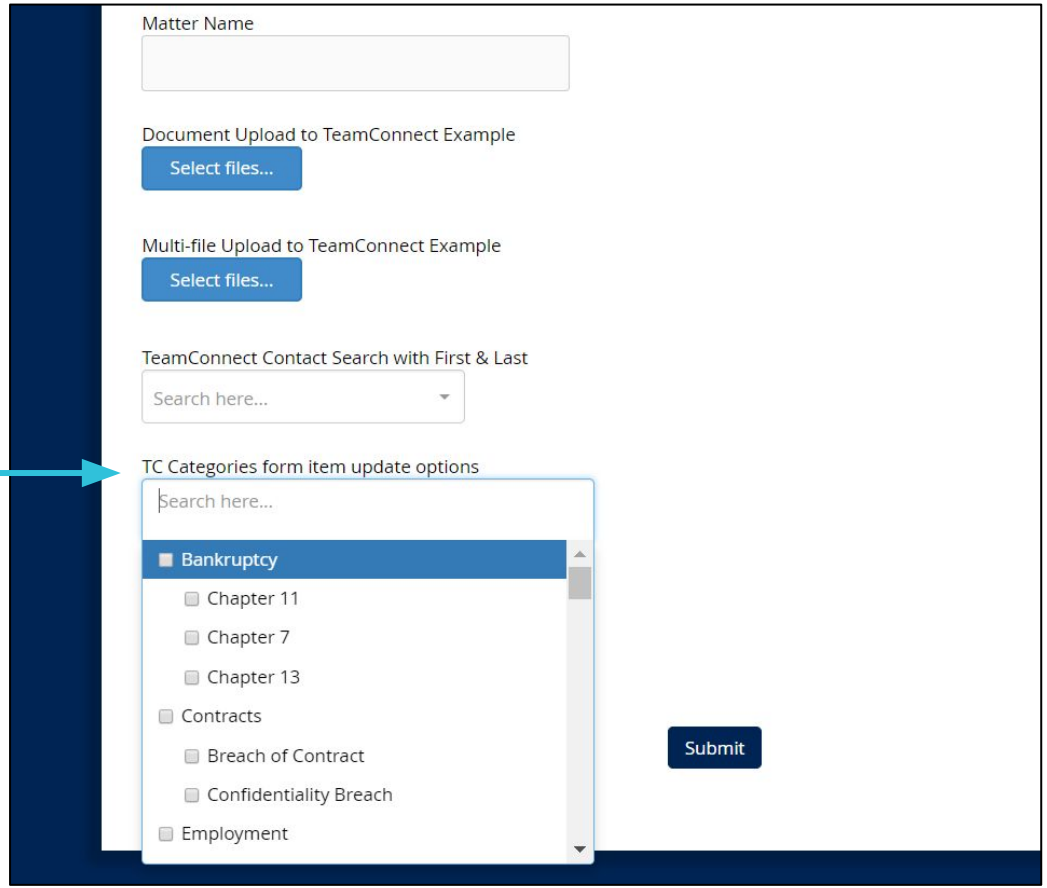
TeamConnect Versions Supported: 4.2 through 6

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.



TeamConnect Versions Supported: 4.2 through 6

MITRATECH

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

Areas Impacted

✓ Data Sources

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

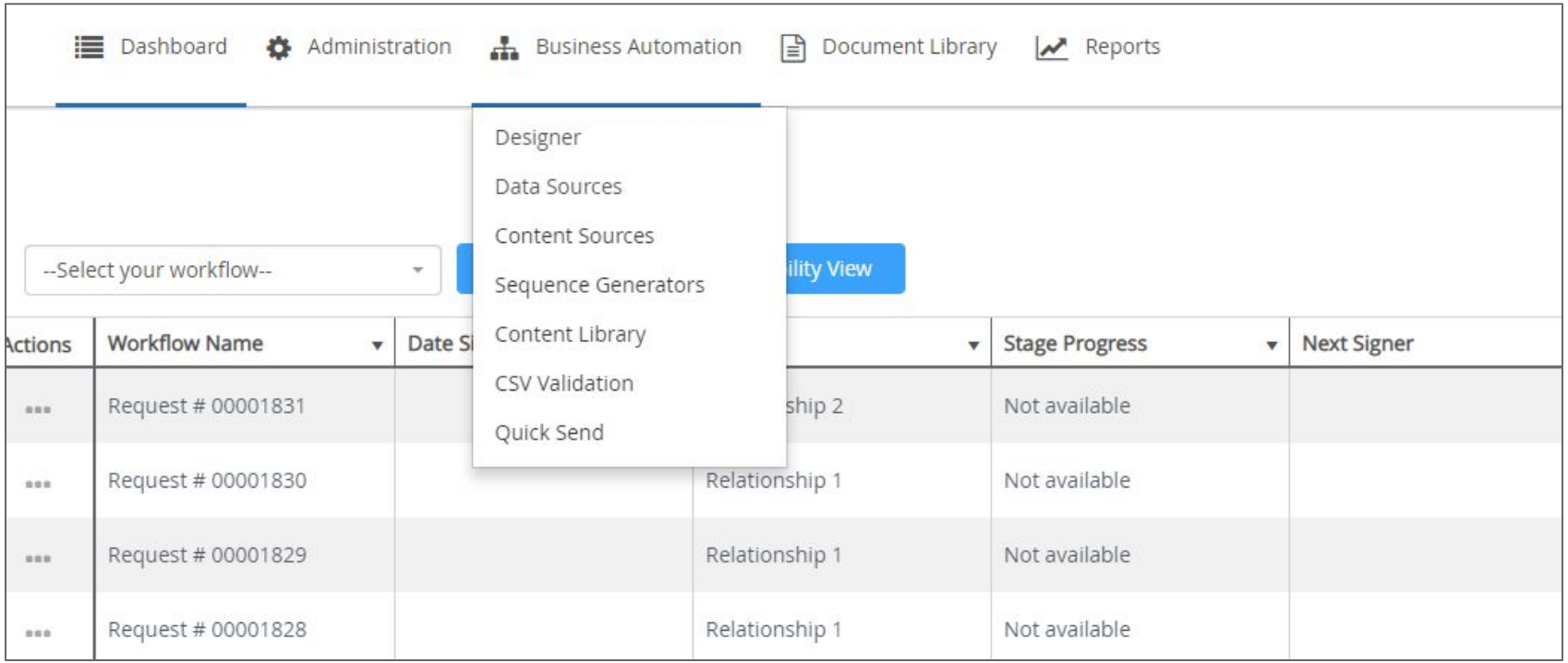
Save Data Source Cancel

Areas Impacted

✓ Top Navigation

Removal of ‘**Create and Send**’

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



MITRATECH

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!