CourtAlert® CM/ECF Version 3.0

Summary of New Features

CourtAlert CM/ECF Interface with Interwoven WorkSite(Filesite/Desksite):

1. In Non-Matter Centric environment and in Matter Centric environment
2. Batch migration of existing Document (PDF) files
3. Opportunities to improve the business process
4. All Document files become full text searchable, including those from ECF Reconciliation
5. No additional work to docketing personnel

CourtAlert CM/ECF Inquiry Module:

1. Full text search for case headers, Dockets and Documents (such as PDF files)
2. Ability to choose the color of the display for the firm

Reconciliation of ECF Notices:

1. Ability to preview ECF notices and Document files prior to reconciling
2. Filtering pending ECF notices by Branch Office and other criteria
3. Searching pending ECF notices by parties, index number, docket text or any word on the Document file
4. Automatic notification if an ECF's PDF file does not exist or the "free look" was already taken

Outlook Interface:

1. User control interface allowing users to download any future diaries
2. Automatic downloading of calendars at a pre-defined schedule
3. For adjourned diaries, removal of adjourned dates and insertion to Outlook of the new dates

Administrator Module:

1. New reports for database integrity
2. Work report for any Branch Office and dates range

Complete Branch Office Support for Docketing:

1. Branch Office can be selected from a pull down list
2. Employee of one Branch Office can docket for another Branch Office

1. Users can attach Documents files (PDF or other types of files) to docket:

   The Document files can come from three sources:
   - Documents files on local or network drive
   - Documents files from ECF reconciliation
   - Documents put by other users at other location within Interwoven WorkSite

2. When exporting the documents from CourtAlert CM/ECF to Interwoven, the Interwoven WorkSite profile for the document is being auto populated by the program. No manual typing needed to update the profile.
   - Each firm can choose which CourtAlert CM/ECF fields go to what fields in the Interwoven WorkSite document profile ("mapping")
   - The entire docket text is typically put in the Interwoven WorkSite document profile "comment" field which is full-text searchable. Thus any Interwoven WorkSite user can find the document by any word on the docket text (for example by whom, when and how the document was served)

3. Exporting the document into Interwoven WorkSite in a Matter-Centric environment: CourtAlert exports the document into the designated MAO folder in Interwoven WorkSite within the client matter folder. User does not need to enter any information into the profile. The document profile can either be inherited from the Interwoven WorkSite folder's profile or auto populated from CourtAlert CM/ECF data.

4. Batch migration of existing Document files: Utilities and program exist to move Document files from their current location in CourtAlert CM/ECF to an agreed upon folder structure in Interwoven WorkSite.

5. Typically clients run two batch processes inside Interwoven WorkSite:
   - Utility to mark the Document file as a permanent "record", so it can not be modified
   - Renaming the file to the first part of CourtAlert docket text to make it easy for Interwoven WorkSite users to inquire into the data via Interwoven WorkSite

6. Making all PDF files full-text searchable: CourtAlert interfaces with AccuRoute, which is used to OCR the document. AccuRoute does the OCR on the document in the background and puts it back into Interwoven WorkSite.

7. Web Inquiry program has a new full text search which is now capable of searching within the text based PDF documents in addition to the header and docket data.
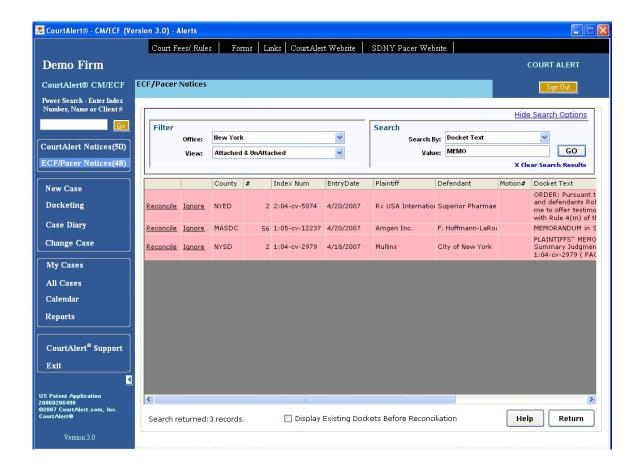
Possible workflow - different firms have different workflow - one possible workflow:
   - Paralegal and associate put files to be docketed in the "To Be Filed" subfolder within each client/matter folder in Interwoven WorkSite
   - A list or email be provided to MAO of which documents to docket
     MAO can then locate the documents, view them, docket and they will automatically be moved to the MAO folder within each Client Matter folder

Alternatively, court documents can be first provided to MAO who will docket them, put in the proper folder in Interwoven WorkSite and then inform the paralegal and others via CourtAlert CM/ECF Save-and-Notify.

Reconciliation

1. Preview: A method to review the incoming email and their attached Document files prior to reconciliation by clicking on the "plaintiff" or "index number" column. The preview is a snapshot of the ECF Email.

2. ECF / CourtAlert Notices:
   - Ability to filter notices by branch information
   - Ability to search notices by any criteria including the docket text.

3. Document missing, user permission issues, free look already taken: To warn against situations such as if the program is unable to download any Document files. The program sends a notification email to the client and CourtAlert Support (if the client allows this).

Sample EMAIL Report

Firm Name	(Firm name is inserted here)
Internal ID	7054
Date/Time	Wednesday, November 26, 2008 2:54:58 PM
Class/Function	Download Document/Get New Link
Index Number	1:07 -cv-9999
Court	https://ecf.nysd.uscourts.gov
Pacer No	53
Document URL	https://ecf.nysd.uscourts.gov/doc1/12705583184?magic_num=85648459&de_seq_num=188&caseid=303104
Document Description	Main Document
Issue	Message Returned from the PACER System: **Could not display /tmp/5326832-0-.Document, it does <u>not</u> exist.**

Inquiry Module Screens

1. **Color of the display: Firms can choose a color for the inquiry module which now is red (and therefore may be confused with CourtAlert public web site). The procedure is as following:**

    a. The client chooses a color from http://www.courtalert.com/colorpicker.htm - which is a display of many possible colors, each marked with a code. The client emails us this code

    b. CourtAlert will change the color on its site and provide the client with PDF files displaying the screens with the chosen color

    c. If the client likes the result it will be implemented on its location

2. **Advanced Search capabilities:**

    Ability to put a value in and have it searched by either or all of:

    a. Case Header: Any party, index number, case ID, client number, matter number, "nick name" of the case
    b. Case Dockets: Any word in docket text
    c. Document files (such as PDF files): Any word in any Document file, including those from ECF reconciliation

3. **The user can choose all or some of the criteria:**

    Coming soon, Multiple Parameters inquiry: The user can put values into any of the possible parameters and the program displays the data that meets all parameters. This will work in a manner similar to the "ad hoc" report in the admin program

4. **Complete Branch Office Support**

    Users can now with ease docket for other Branch Offices of the firm and many reports can be created for selected Branch Office

Advanced Calendar Outlook Interface Support:

There are two methods of populating users' Outlook calendars with information from CourtAlert CM/ECF diaries:

a. User selects from a My Calendar web display which diaries to download and clicks on Download

b. A program loaded on the user PC automatically downloads diaries. The program can be configured to run in the background, at a predefined schedule or on demand. For example, the program can be configured to automatically run every week to download the next two weeks' diaries. When there is adjournment the program removes the adjourned diaries from Outlook and put the new ones into Outlook if applicable

New Reports in Administrator Module:

New reports to verify data integrity:
       a. A list of all cases without Branch code
       b. A list of all cases where there is no case team and therefore no representative from firm.
       c. A list of all cases where there is a case team but no one was selected as the main
          representative (attorney of record) from the firm

* These reports can be exported to an Excel file
* A tool was created so future spread sheet style reports can be created with very little effort

Work Reports:

A list of all dockets and diaries added or modified within a selected date range and for a specified branch office can now be generated using the Admin program.
    • Optional separate reports for new dockets and changed dockets
    • Work Reports may be utilized to charge the firm clients for docketing work

We are Committed to Remain the Best!

Thank You,

Izzy Schiller, President
CourtAlert