
5.11b029 Patch Release

ENHANCEMENTS

- The delivery date field on assignments, staff progress, orders, etc. will now all show a label of "Deliver By" for consistency. [SD-509]
- The assignment deliver by date will be updated for the earliest check out deliver by date. It will no longer be updated for the earliest order deliver by date. The check out deliver by dates will no longer be updated by Solaria. [SD-510]

5.11b027 Patch Release

ISSUES RESOLVED

- The Staff Statements report, when run for multiple staff, will no longer include invoices that are due or sent after the ending date of the report. [SD-497]

5.11b026 Patch Release

ISSUES RESOLVED

- When fetching pending orders from ServiceLink that has no order items on it, it will no longer return a SQL error. [SD-486]
- When fetching check-ins and worksheets together using the batch fetch for ServiceLink, it was sometimes missing worksheets if the fetch of check-ins updated the staff progress information in ServiceLink before fetching the worksheets. [SD-490]

5.11b025 Patch Release

ENHANCEMENTS

ASSIGNMENTS

- The assignment delivery date and delivery type will be updated with the earliest check out delivery date entered on the assignment, even if the check out delivery date is later than the assignment delivery date.
- The assignment delivery date and delivery type along with the check out delivery dates and types will be updated with the earliest delivery date from pending orders or orders when the worksheets are brought in from ServiceLink or when orders are created or updated. [SD-480]
- The user will be warned if they change the delivery date on the assignment that has already been confirmed by staff. [SD-482]

- The “Create Orders” task on an assignment will now be marked as completed if any pending orders are created on the worksheet for it in ServiceLink.

STAFF PROGRESS TRACKING

- The Staff Progress Tracking list “Status” column will now show the tracking items that are checked on assignments for the “All Staff Work” item in the list. [SD-479]

5.11b022 Patch Release

ENHANCEMENTS

STAFF MAINTENANCE

- If a duplicate commissions item is entered on the Staff Maintenance window, it will now tell you the name of the item that is a duplicate when you try to save. [SD-477]

ASSIGNMENT DETAILS

- The “Copy” button on the Assignment Details window was renamed to “Copy Assignment”. The “Cancel” button on this window was renamed to “Cancel Assignment”. This is to make it more clear in comparison of cancelling changes on the assignment. [SD-432]
- The fetch from ServiceLink from the Assignment Details window will now include a fetch of staff confirmations. [SD-439]

FILES

- The client name will show after the attorney name in the user access list for assignment files. [SD-429]

STAFF PROGRESS

- When manually turning on a tracking item on the Staff Progress window, and there is only one staff on the assignment, it will automatically select that staff person. [SD-426]
- The Staff Progress Tracking list window will now include tracking items that are not assigned to a staff person and/or responsible person. [SD-428]

DEPONENT UPDATE

- If the deponent name was edited by staff in ServiceLink, the name will show in large red text on the split view of the Deponent Update window. [SD-422]

ATTORNEYS PRESENT

- When fetching worksheets from ServiceLink that contain new attorneys entered on it, Solaria will now look for an existing attorney with the same name and with the same client as entered on the worksheet. A matching attorney will then show on the Attorneys Present window with the information from the worksheet filled in. [SD-458]

SYSTEM PREFERENCES

- You can now use a customized email for staff and client confirmations that are emailed. These use HTML that you specify to use in the body of the email, which include special fields that the application replaces with information from the assignment. [SD-438]
 1. On the Staff and/or Client tabs of System Preferences, check **Use Custom HTML Format for Emailed Confirmations**.

System Preferences

Company Staff Clients Cases Assignments Orders Invoices Interfaces

Guaranteed Pay Split Staff Pay by Product Type
Default Guarantee Pay Type

Calculate Commissions On Gross Invoice Amount
 Profit

Emailed Letters & Reports Print Company Logo at the Top of Messages

Confirmations Print Order/Invoice Remarks for Ordering Client/Attorney
 Print Previous Appearances for Case
 Print Previous Orders for Case
 Exclude Other Services
 Use Custom HTML Format for Emailed Confirmations:

Default Confirmation Status

Statements Do Not Print Accumulation Totals

2. Click on the **Add** button to the right of the box.

Search Name

Search For

Get HTML from File:

Format Name:

HTML Text:

```
<html>
<style>
p {
  font-family: 'Segoe UI', Tahoma, Geneva, Verdana, sans-serif;
  font-size: 10pt;
}

h1 {
  font-size: large;
  color: #008080;
  font-style: italic;
}

h2 {
  font-size: large;
}

h3 {
  font-size: 12pt;
}

h4 {
  color: #0000af;
  font-weight: bold;
}
```

3. Paste the HTML into the **HTML Text** field, or use the **Get HTML from File** button to have it get the HTML text from a file.
4. Give the format a name in the **Format Name** field. You can use more than one format, if desired, and the name gives you a way to distinguish each one. For example, you can use one format that goes to law firms and another format that goes to affiliates.
5. Click on **OK** to save.

You can find a list of fields that can be included by clicking on the **Field List** button. The fields must be surrounded by curly brackets. For example, to print the assignment date, put "{Job.JobDate}" in your HTML text.

Note: these formats are ONLY used by confirmations that are sent to the **Email** report destination.

- Products can now be set up to be hidden from worksheets in ServiceLink so that staff have less items to choose from when creating orders on the worksheets. Check the "Hide on Worksheet" checkbox next to the products that you do not want staff to enter on worksheet orders. This will not affect standing orders or existing orders with other items on them. [SD-402]

Set Up Products

Description	Remove	Add	Invoice Description	Product Type	Unit Type	Group	Taxed	Active	Hide on Turn-In Sheet
Additional ASCII (Text)			Additional Copy ASCII	Misc - Unpaid	Flat Fee	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Additional Condensed			Additional Copy Condensed Transcript	Misc - Unpaid	Flat Fee	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Additional E-Transcript			Additional Copy E-Transcript	Misc - Unpaid	Flat Fee	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Additional Hard Transcript			Additional Copy Hard Copy Transcript	Transcript - Copy	Page Rate	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Additional PDF Transcript			Additional Copy PDF Transcript	Misc - Unpaid	Flat Fee	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Note: This feature is not yet available in Servicelink at the time of this release. Check the release notes in Servicelink's "About" window for when this feature becomes available.

ISSUES RESOLVED

SETTINGS

- When adding a new conference room to a company, it will no longer return a SQL error. [SD-430]
- You can now select the new "In Service Area of Assignment Location" staff assignment search option as your default in System Preferences. Go to **Settings → Preferences → Assignments** tab: Default Staff Assignments View option. [SD-440]
- When a client address or conference room is updated in Solaria, it will now send the changes to ServiceLink to update the items there plus any assignments that used those addresses. [SD-405]

CALENDAR

- When using the Manager view of the calendar and making changes to an assignment, it will now prompt you to save or cancel changes if you click on the **Synch to ServiceLink** button before the changes have been saved. [SD-423]

ASSIGNMENTS LIST

- The Assignments List window will no longer return an error if more than one service area is found for a location of an assignment in the list. It will now display all service areas that apply to the assignment locations in the list. [SD-461]
- You will now be able to confirm a selection of assignments on the Assignment List window without it telling you there are no assignments to confirm. [SD-464]

ASSIGNMENTS DETAILS

- Angle brackets (< and >) will now be allowed in the Notes and Special Instructions on an assignment without causing syncing errors with ServiceLink. [SD-437]

FILES

- When a staff person is removed from an assignment, they will also be removed from any files they were given access to. [SD-414]
- Syncing files on an assignment where a file has been removed in ServiceLink will no longer return a SQL error. [SD-404]
- When you click on "Email Files" on the assignment files list, the heading "Attorneys and Contacts" was changed to "Attorneys" if you are integrating with Servicelink. Only attorneys that have been given access to any files can be selected here in this case. [SD-446]

STAFF PROGRESS

- The delivery type calculated from the delivery dates fetched in from the ServiceLink Staff Progress or Worksheet pages will now calculate from the assignment date to the delivery date instead of from the current date to the delivery date. [SD-424]
- When the tracking items are selected to view with other items on the Staff Progress Tracking list window, it will now include the tracking items in the list of results. Previously, you would have to select them separately. [SD-425]
- When manually entering a due date or completed date for a tracking item, it will no longer clear out the date you entered after leaving the field. [SD-456]

DEPONENT UPDATE

- On the Deponent Update window, when you add a deponent from a ServiceLink worksheet for an assignment that does not have any deponents listed for it, it will no longer return a SQL error. [SD-436]

ORDERS/INVOICES

- The Shipped On date can now be cleared on an order that already has this date saved on it. [SD-472]
- When you change the client on an invoice, then save with no attorney, it will no longer return a SQL error. [SD-441]
- The Original Sent On date can now be cleared on an invoice that already has this date saved on it. [SD-462]
- When manually adding a new staff invoice, it will no longer show a line on the window that does not really exist. [SD-474]
- Clicking on the Invoice number link on an order to go to the related invoice will now work correctly. [SD-478]

ASSIGNMENT TASKS

- Double-clicking on the "Complete Staff Work" task will now take you to the Staff Progress window instead of the Deponent Update window. [SD-457]

REPORTS

- The "Aging Report" was optimized for performance. This report is found under the "Financial" section of reports. [SD-459]
- The "Invoices" column on "Statements with Client Invoice Information" report was fixed to wrap the list of invoices. This report is found under the "Staff" section of reports. [SD-465]

5.11b015 Patch Release

ENHANCEMENTS

- A new column named **Location Address** was added to the Assignment List window. This will display the address 1 and 2 fields of the address for the location of the assignment. The **Location** column was renamed to **Location City**. Click on the configure (cog) icon at the top-right of the list to check the new column to view it in the list. [SD-411]
- A new column named **Assignment#** was added to the Invoice List window. This will display the assignment number of each invoice listed. Click on the configure (cog) icon at the top-right of the list to check the new column to view it in the list. [SD-416]

ISSUES RESOLVED

- When clicking on the “Assign to Service” button on Staff Assignments or the Schedule Manager window and there is no staff selected in the bottom list of the window, it will no longer assign the selected service to the last staff person listed. [SD-413]
- After assigning or confirmation staff and clients in the Schedule Manager window, then sending the changes to ServiceLink, it will now show the checkmarks next to the assignment correctly. [SD-419]
- When sending assignment locations to ServiceLink, it will no longer show a different address in ServiceLink than what is in Solaria under special circumstances. [SD-408]
- When viewing check in and check out notes, the notes will display a scrollbar if the text in them is not all visible on the window. [SD-409]
- When retrieving worksheet orders, it will now display all pending orders under the assignment, even if the Deponent Update or Attorneys Present have not been saved yet or do not have direct links to them. [SD-418]
- When saving a client invoice and there are no tax rates set up in the application, it will no longer display a SQL error. [SD-406]
- When sending a staff invoice to ServiceLink from the Staff Invoice window, it will no longer display a “divide by zero” error. [SD-407]
- When deleting a product from the Product List that has been used on a commission template(s), it will no longer display a SQL error and will delete the product from the commission template(s) when deleting the product. [SD-410]
- Users will no longer be required to have full access to System Preferences in order to edit their own Workstation Settings. [SD-417]

5.11b009 Patch Release

ISSUES RESOLVED

- When fetching check-ins from ServiceLink for multiple assignments, it will no longer enter extra staff on the Staff Progress window. [SD-395]
- When confirming an assignment with a client and no delivery type is selected on the assignment, it will no longer display a SQL error. [SD-403]

5.11 Release

ENHANCEMENTS

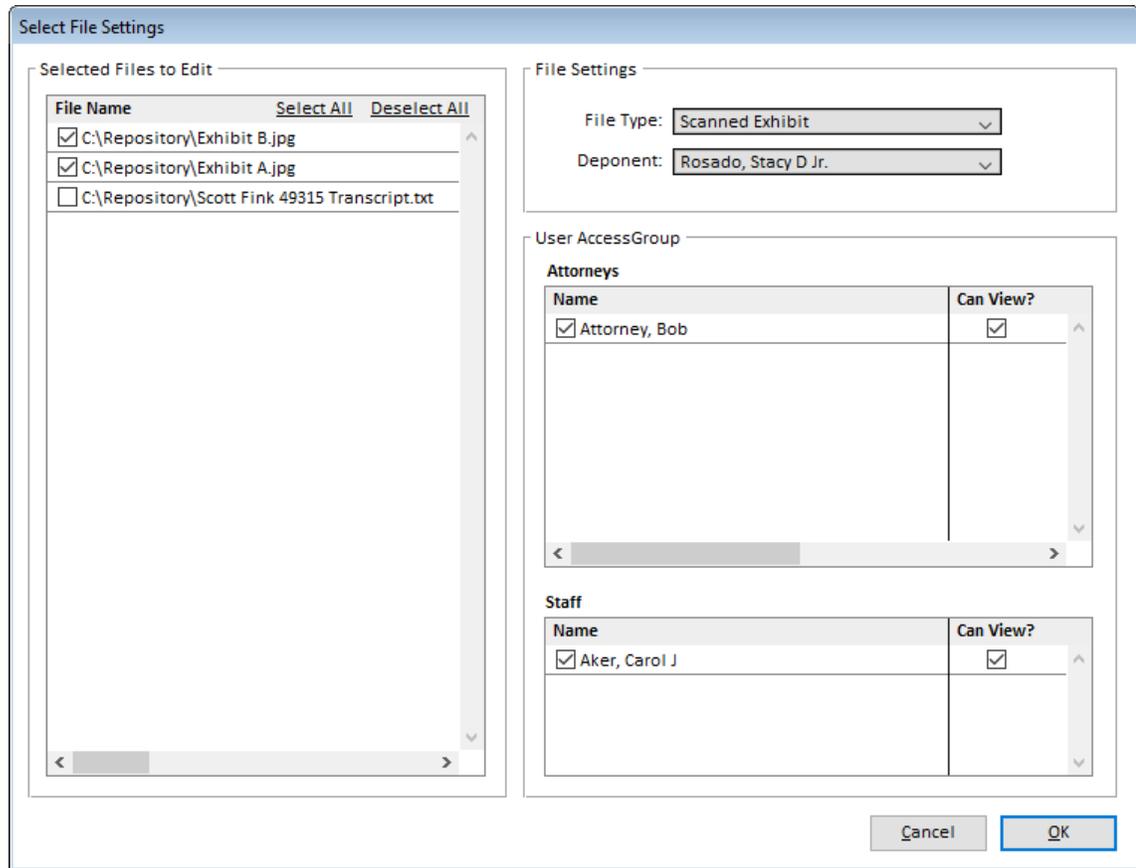
ASSIGNMENTS

- The **Delivery Type** on a new assignment will now default to the **Default Delivery Type** set on the Orders tab of System Preferences. Once the assignment date is set, it will calculate the **Must Deliver By** date for you. After this, changing either the **Delivery Type** or **Must Deliver By** date will calculate the other one for you. [SD-384]
- The Assignment List window will now show the delivery type set on the assignment if you show that column in the list.
- The status shown at the top of the Assignment Details window will now show the assignment's status instead of the web request status if a change was requested in ServiceLink on the assignment.

ASSIGNMENT FILES

An **Edit** button was added to the top of the list of files on the Assignment Files window. Clicking on this will open a window where you can select multiple files and update the other attributes about those files all at once. In

other words, you can select multiple files and set the file type, deponent and user access on all of the files at the same. [SD-380]



STAFF ASSIGNMENTS

When viewing the list of available staff for a service on an assignment, it will now keep the list sorted by the column you last sorted on while Solaria is open – either the Name column or the Rating column. The sorted column name will be underlined as well. [SD-388]

Possible Staff to Assign to Selected Service: Show Any Available Staff

Name	<u>Rating</u>	7	AM	8	9	10	11	12
Aker, Carol J	*****							
Bender, Jose P	****							
Ellison, Elizabeth R	***							
Black, Jan								

CONFIRMATIONS AND NOTES

EMAILED CONFIRMATIONS

You can now print assignment notes, location notes, case notes, client notes and attorney notes on staff confirmations. These are each optional. To turn these on, go to **Settings → Preferences → Staff** tab and check the notes that you want to print on the confirmations.

If you integrate with ServiceLink, these checkboxes will also indicate which notes to send to ServiceLink and show on assignments there. Only company users and staff can see these notes in ServiceLink and staff can only see public notes. [SD-385]

System Preferences

Company **Staff** Clients Cases Assignments Orders Invoices Interfaces

Guaranteed Pay Split Staff Pay by Product Type
 Default Guarantee Pay Type: **Non Guaranteed**

Calculate Commissions On Gross Invoice Amount
 Profit

Emailed Letters & Reports Print Company Logo at the Top of Messages

Confirmations Print Order/Invoice Remarks for Ordering Client/Attorney
 Print Previous Appearances for Case
 Print Previous Orders for Case
 Print Assignment Notes
 Print Assignment Location Notes
 Print Case Notes
 Print Client Notes
 Print Attorney Notes
 Exclude Other Services

Default Confirmation Status: **Confirmed**

Statements Do Not Print Accumulation Totals

Assignment Staff Progress Tracking Automatically Turn On Tracking Items
 Turn-In Sheet Due: **2** Days After Assignment Date
 Staff Work Due: **2** Days Before Delivery Date

If any of the new checkboxes are checked, the "Print Notes on Confirmations" checkbox will be turned on in the Staff Assignments. (This was renamed from "Print Assignment Notes on Confirmations".)

Staff Assignments

Assignment Information

Client: Best Law Firm
 Attorney: Attorney, Bob
 Location: 1200 W. Blake St
 Suite 12
 Denver, CO 80203

Assignment Date: 12/23/2016
 Start Time: 4:00 PM MT
 Estimated Length: 4 Hours
 Print Notes on Confirmations

The public notes for each category will print on the confirmations. If you do not want any notes printed for a specific assignment's confirmation, uncheck the above checkbox.

BULK CONFIRMATIONS OF STAFF AND CLIENTS

When viewing an assignment on the Manager Schedule window, you will now see a link called "Other Assignments" near the client confirmation and staff confirmation buttons.

Demonstration October 19, 2016 Manager

Wednesday, October 19, 2016	Client Confirmed	Staff Assigned	Staff Confirmed
10:00-11:00 (JE) Attorney, Bob	✓	✓	
3:00-6:00 (GLP) Bradley, John F.		✓	

Assignment Information

Status: 2-Assigned Assignment #: 49427
 Client: Best Law Firm
 Attorney: Attorney, Bob
 Location: Conference Room: Room B
 3895 Grand Avenue
 Winter Park, FL 32733
 Start Time: 10:00 AM MT Estimated Length: 1 Hours
 Print Notes On Confirmations Confirmed on 10/18/2016 10:48 AM

[Client Confirm](#) [Send Confirmation](#) [Other Assignments](#)

* Requires dedicated staff [Other Assignments](#) [Remove](#) [Confirm](#) [Send Confirmation](#)

Services	Assigned Staff	Confirmed On	Confirmed By
Stenography**	Erby, Jeffrey M		

Clicking on “Other Assignments” will display the Assignments List window with assignments for the next month for that same client or selected staff person.

You can select multiple assignments in the list and click “Confirm Staff” or “Confirm Client” at the bottom of the list. This will allow you to confirm one of the clients or staff that are on all of the selected assignments if they have not been confirmed yet. [SD-381]

Assignments Show From To Companies

Search on Staff Name=Erby, Jeffrey M

Assignment#	Date	Time	Client	Attorney	Deponent	Status	User Reference	Case Cap
DM-49484	12/22/2016	4:00 PM	Best Law Firm	Attorney, Bob	Jones, Melanie	3-Confirmed	BILLY	Billy ^
DM-49497	12/23/2016	4:00 PM	Best Law Firm	Attorney, Bob	Doe, John	2-Assigned	WC-1234	John
DM-49486	12/29/2016	1:00 PM	Best Law Firm	Attorney, Bob	Macy, Marcy	2-Assigned		Macy
DM-49493	12/30/2016	2:12 PM	Best Law Firm	Attorney, Bob	Ginn, Lawrence C	2-Assigned		Julia

Include Cancellations 4 Assignments Listed

CONTACTS

The checkbox to copy contacts on attorney emails was renamed to “Copy Contact on All Emails to Associated Attorneys” to clarify what the checkbox will do. [SD-383]

REPORTS

The “Payroll” reports were renamed to “Payables” to avoid implying that staff should receive employee benefits if found on a payroll report. [SD-389]

ISSUES RESOLVED

ASSIGNMENTS

- Locations previously used by clients on assignments will now be listed and available to select from on new assignments or when editing existing assignments. [SD-387]
- When entering/editing assignments, if the Enter key is pressed after entering a client, attorney, caller or case name, it will no longer return a SQL error message as it tries to look up the entity and save at the same time. [SD-382]
- When retrieving staff confirmations from ServiceLink, it will now convert the confirmation time to your current time zone. [SD-391]
- When retrieving check in information from ServiceLink, it will no longer show the current user as the person that checked them in. [SD-394]
- When retrieving check out information from ServiceLink, it will no longer return a SQL error when it creates tracking items on the assignment and there is no department lead for the department assigned to the “Complete Staff Work” assignment task. [SD-390]

- When retrieving check out information from ServiceLink, it will now show the Billable Hours Reason note entered by the staff when they checked out. [SD-399]
- When loading the Deponent Update window with information from the staff turn-in sheet, it will now exclude items that were partially entered. For example, it will not include the starting transcript page if there is no ending page entered on the turn-in sheet. [SD-393]
- When using the “Add” button on the split screen of the Attorneys Present window to copy a new attorney added by a reporter in ServiceLink to Solaria, it will no longer switch the email address and phone number fields. [SD-396]