

5.31 Release

ISSUES RESOLVED

- **Calendar:**
 - When using assignment counts and canceling an assignment directly from the calendar using the context menu, it will now clear out the room, meal and reporter counts on the assignment. [SD-749]
 - On the Manager Schedule view, services that do not use staff will be considered assigned and confirmed when looking at the checkmarks next to each assignment. [SD-727]
- **My Reminder Notes:** When sorting the My Reminder Notes list, it will now show the checkmark for any completed notes correctly. [SD-750]
- **Staff Progress:** If no services on an assignment use progress tracking, the message shown on the Staff Progress window will now read "No Staff Progress Used on this Assignment". [SD-721]
- **Deponent Update:** If a deponent is deleted from the Deponent Update window and it was a deponent that was used on the ServiceLink worksheet for the assignment, it will now remove the association of the deponent to the worksheet deponent. This will allow the deponent to be added again later on the window and will result in being able to view the order items for that deponent on a pending order. [SD-733]
- **Assignment Files:**
 - The **Email Files** button on the Assignment Files window will now show all attorneys and staff that are on the job. [SD-723]
 - When integrating with ServiceLink and adding a file to an assignment then only giving an attorney access to the file, it will no longer show a SQL error regarding the insert into the JobFileStaff table when the window is saved. [SD-752]
- **Client Invoices:**
 - When printing an invoice to the Email destination and neither the attorney nor client have a preferred destination set up, it will now send the email to the attorney's email address that is on their account. [SD-741]
 - When printing invoices using text in the "Invoice Interest/Discount Line Item Text" field of invoice preferences, it was sometimes not including the interest/discount line when attorneys did not override client preferences for invoices. [SD-751]
- **Transactions:**
 - Credits to staff and returns from clients will now be sent to ServiceLink correctly to show properly on transactions there. [SD-728]
 - If a search is done on the transaction window to bring up multiple invoices for a client, it will now calculate the amounts to pay on each item of an invoice with the balance due on the item. This will result in discounts and other invoice charges getting paid correctly. [SD-740]
- **Reports:** When printing attorney statements to the Email destination and not using the 'Use Preferred Destination' option, statements will be individually emailed to each attorney. [SD-741]

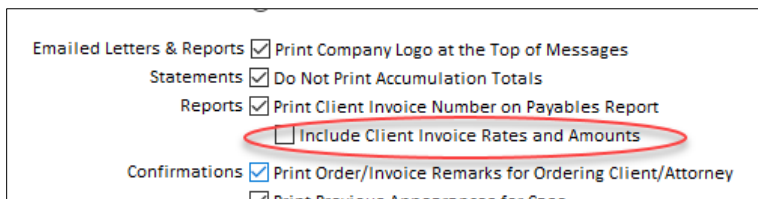
ENHANCEMENTS

The client type was added to the Assignments Scheduled report.

5.30b010 Patch Release

ENHANCEMENTS

A separate preference was added in **System → Preferences → Staff** tab for the Staff Payables report so that you can print the client invoice numbers *without* the client invoice rates and amounts, if desired. [SD-719]



The screenshot shows a window titled "Staff" with several sections of preferences. The "Reports" section contains the following items:

- Print Company Logo at the Top of Messages
- Do Not Print Accumulation Totals
- Print Client Invoice Number on Payables Report
- Include Client Invoice Rates and Amounts (This checkbox is circled in red in the original image)

Other sections visible include:

- Emailed Letters & Reports** with Print Order/Invoice Remarks for Ordering Client/Attorney
- Confirmations** with Print Previous Appearances for Case

ISSUES RESOLVED

- When using the "Create YesLaw Files" button on the Assignment Files window, it will now correctly send the assignment number parameter to the YesLaw Generator. It was previously appending a "-J" to the case name. [SD-718]
- When copying product prices, it will no longer show expired companies to copy into. [SD-717]

5.30 Release

ENHANCEMENTS

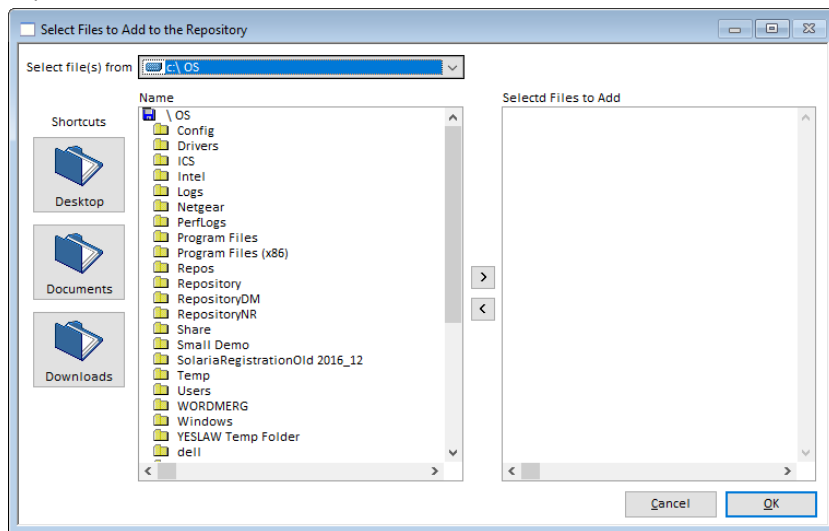
FILE ENHANCEMENTS

- New options were added to the **File Types** under **Categories and Types**: [SD-135]
 - **Auto Access to Staff:** (Visible if integrating with ServiceLink.) All staff on services or staff invoices on an assignment are granted full access to any files on the assignment with that file type. As staff are added/removed from the assignment, or as staff invoices are manually created or voided, the staff listed on the user access list for the files with that file type will be updated.
 - **Auto Access to All Attorneys on Assignment:** (Visible if integrating with ServiceLink.) All attorneys on an assignment are granted full access to any files on the assignment with that file type. This includes the scheduling attorney, attorneys present, ordering, billing and shipped to attorneys. As attorneys are added/removed from the assignment in all areas of the assignment, the attorneys listed on the user access list for the files with that file type will be updated.
 - **Attach to Staff Confirmations:** If a file with this file type is found on the assignment or on a case related to the assignment, it will automatically attach the file to emailed staff confirmations.
 - **Attach to Client Confirmations:** If a file with this file type is found on the assignment or on a case related to the assignment, it will automatically attach the file to emailed staff confirmations.

Set Up File Types

Description	Remove	Add	Associated Application	Auto Access to Staff	Auto Access to All Attorneys on Assignment	Attach to Staff Confirmations	Attach to Law Firm Confirmations	Active	System
ASCII			Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Audio File			Audio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Correction Sheet			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ETranscript			ETranscript	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
For Scheduling Attorneys			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Notice			PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Order Form			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Picture			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Returned Check			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scanned Exhibit			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scanned Notice			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Unknown			Unknown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Voucher			Graphic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Select One	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- When adding files to an assignment, the files selection dialog box will now show shortcut buttons to your Desktop, Documents and Downloads folder to make it easier to get to the files there. In addition, the dialog box will now allow you to build a list of files to add to the assignment by moving files to the list on the right side of the dialog box. (If you only need to add one file, you only need to select the file.) [SD-608]



- A checkbox column was added to the front of the assignment file list. You can now select the files you want then click on **Delete** or **Download** to process all selected files for the button. [SD-673]

Assignment Files			
Selected	File Name	Add	Edit Delete
<input type="checkbox"/>			Download Open (1)
<input type="checkbox"/>	C:\Repository\2017\07\49677\Bravo, OrlandoV1_103009 Transcript.txt		
<input type="checkbox"/>	C:\Repository\2017\07\49677\Exhibit A.jpg		
<input type="checkbox"/>	C:\Repository\2017\07\49677\Exhibit B.jpg		
<input type="checkbox"/>	C:\Repository\2017\07\49677\notice_of_d epo1.pdf		

- The **Open** button in the **File Name** column was renamed to **Open (1)**. This is to indicate that the button will only apply to the highlighted file as you can only open one file at a time.
- When using the **Edit** button in the **File Name** column and no file type and/or deponent is selected, it will keep the file type and/or deponent already selected on each file. [SD-679]

- If **Integrate with ServiceLink** is turned on in Preferences:
 - An **Add User** button was added to the **User Access** column of the assignment files list. Select (check) the files you want to add a user for, then click on **Add User**. A list of all possible users on the assignment will be displayed to select from. Saving will add the checked users to the selected files. [SD-675]
 - A **Remove User** button was also added to the top right of the assignment files list. Select (check) the files you want to remove a user from, then click on **Remove User**. A list of all users on the selected files will be displayed to select from. Saving will remove the checked users from the selected files. [SD-675]
 - The **Edit** button in the **User Access** column was renamed to **Edit (1)**. This is to indicate that the button will only apply to the highlighted file as you can only edit the user access for one file at a time.

User Access	Add User	Remove User
	Edit (1)	Can View? Was Notified?

- On the case files list, you can now enter a **Description** for each file and see when it was added to the case. Additionally, if you integrate with ServiceLink, you can check whether a file can be shown to staff or attorneys on assignments with that case. When the case is sent to ServiceLink, it will send the files marked to show to staff or attorneys to ServiceLink. [SD-673]

Billy Bob's Case

Case Name: Case#: 12249 Effective:

Case Type: Company: Expires:

General | Invoice Remarks | Commissions | Files | Law Firms

File Name	Open	Delete	Add	Description	File Type	Upload Date	View on ServiceLink Assignments
C:\Repository\ServiceLink Setup Questionnaire.docx				ServiceLink Setup Questionnaire	Scanned Exhibit	07/12/2017 9:45 AM	<input checked="" type="checkbox"/> Staff <input checked="" type="checkbox"/> Attorneys/Contacts

A separate list of related case files will then display on the assignment files window.

Assignment Files

Selected	File Name	Add	Edit	Delete	Description	Upload Date	File Type	Deponent	Sent to Repository	User Access	Add User	Remove User	Was Notified?
<input type="checkbox"/>		Download	Open (1)								Edit (1)	Can View?	
<input type="checkbox"/>	C:\Repository\2017\07\49677\Bravo, OrlandoV1_103009 Transcript.txt				Bravo, OrlandoV1_103009 Transcript	07/12/2017 3:32 PM	ETranscript	Jones, Melanie	<input checked="" type="checkbox"/>				
<input type="checkbox"/>	C:\Repository\2017\07\49677\Exhibit A.jpg				Exhibit A	07/12/2017 3:32 PM	Scanned Exhibit	Jones, Melanie	<input checked="" type="checkbox"/>				
<input type="checkbox"/>	C:\Repository\2017\07\49677\Exhibit B.jpg				Exhibit B	07/12/2017 3:32 PM	Scanned Exhibit	Jones, Melanie	<input checked="" type="checkbox"/>				
<input type="checkbox"/>	C:\Repository\2017\07\49677\notice_of_depo1.pdf				notice_of_depo1	07/12/2017 3:32 PM	Notice	Jones, Melanie	<input checked="" type="checkbox"/>	Attorney, Bob at Best La...	YES	NO	

Related Files

Related Item	Go To Item	File Name	Open	Description	File Type	Upload Date	View on ServiceLink Assignments
Billy Bob's Case		C:\Repository\ServiceLink Setup Questionnaire.docx		ServiceLink Setup Questionnaire	Scanned Exhibit	07/12/2017 9:45 AM	<input checked="" type="checkbox"/> Staff <input checked="" type="checkbox"/> Attorneys/Contacts

Email Files Create YesLaw Files Undo Changes Save Changes Synch to ServiceLink Notes

NEW SERVICE OPTIONS

New options were added to services and assignment details to allow you to skip assigning staff to a service and/or skip tracking progress on a service. [SD-708]

SERVICES

In **Categories and Types** → **Services**, you will see two new columns: **Staff Assignment Type** and **Progress Tracked**.

Description	Remove	Add	Staff Assignment Type	Progress Tracked	Highlight Color	Active	System	Hide on SL Requests
10% Referral Rates			<input type="radio"/> Normal <input checked="" type="radio"/> Dedicated <input type="radio"/> None	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Arbitration			<input type="radio"/> Normal <input checked="" type="radio"/> Dedicated <input type="radio"/> None	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CD/Tape Transcription			<input type="radio"/> Normal <input checked="" type="radio"/> Dedicated <input type="radio"/> None	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Court			<input type="radio"/> Normal <input checked="" type="radio"/> Dedicated <input type="radio"/> None	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Court Reporting			<input type="radio"/> Normal <input checked="" type="radio"/> Dedicated <input type="radio"/> None	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Discount Rate			<input type="radio"/> Normal <input checked="" type="radio"/> Dedicated <input type="radio"/> None	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exam Under Oath			<input type="radio"/> Normal <input checked="" type="radio"/> Dedicated <input type="radio"/> None	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exam Under Oath*			<input type="radio"/> Normal <input checked="" type="radio"/> Dedicated <input type="radio"/> None	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hearing			<input type="radio"/> Normal <input checked="" type="radio"/> Dedicated <input type="radio"/> None	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Staff Assignment Type:

- Select "Normal" if you want to be able to assign any staff person to the service.
- Select "Dedicated" if the staff person assigned to the service cannot be assigned to any other service on the same assignment.
- **NEW!** Select "None" if you do not want to use/assign any staff to the service.

Progress Tracked:

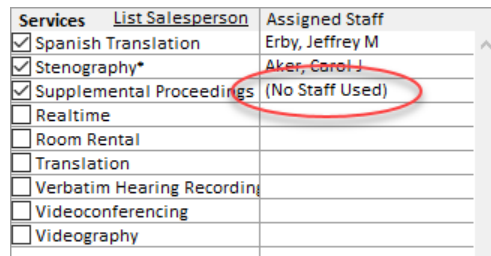
Select "No" on this new field if the staff assigned to the service will not do check in, check out or a worksheet and therefore this information will not need to be entered in Solaria. This will be selected automatically if the **Staff Assignment Type** is set to "None".

By default, "Yes" will be selected which will allow staff to check in, check out and create a worksheet in ServiceLink and/or this information can be entered in Solaria.

Note: Changes to these settings will only affect new assignments create from that point on. Existing assignments will not be affected unless a service is removed and re-added on it.

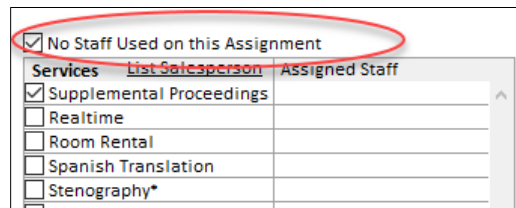
ASSIGNMENTS

When a service is selected on an assignment and it does not use staff on it, you will see a comment of "(No Staff Used") next to the service name in place of the assigned staff name.



Services	List Salesperson	Assigned Staff
<input checked="" type="checkbox"/> Spanish Translation		Erby, Jeffrey M
<input checked="" type="checkbox"/> Stenography*		Aker, Carol J
<input checked="" type="checkbox"/> Supplemental Proceedings		(No Staff Used)
<input type="checkbox"/> Realtime		
<input type="checkbox"/> Room Rental		
<input type="checkbox"/> Translation		
<input type="checkbox"/> Verbatim Hearing Recording		
<input type="checkbox"/> Videoconferencing		
<input type="checkbox"/> Videography		

There is also a new option on the assignment to tell it that no staff will be assigned at all on the assignment.



<input checked="" type="checkbox"/> No Staff Used on this Assignment		
Services	List Salesperson	Assigned Staff
<input checked="" type="checkbox"/> Supplemental Proceedings		
<input type="checkbox"/> Realtime		
<input type="checkbox"/> Room Rental		
<input type="checkbox"/> Spanish Translation		
<input type="checkbox"/> Stenography*		

Selecting this checkbox will hide the options to assign staff to the services in the Staff Assignments window. It will complete the assign staff, confirm staff and send confirmation tasks. It will also complete the check in, check out and worksheet tasks once an order is created.

Note: All assignments require at least one service be selected for it. If **No Staff Used on this Assignment** is not checked, at least one service must have staff assigned to it in order to complete the assignment tasks.

STAFF ASSIGNMENTS

You will only be able to assign and confirm staff to services that have an assignment type of "Normal" or "Dedicated". You will not be able to assign or confirm services that have an assignment type of "None" or if **No Staff Used on this Assignment** is checked on the assignment.

STAFF PROGRESS

You will only be able to enter the progress of staff assigned to services that have **Progress Tracked** set to "Yes". You will not be able to enter the progress of staff assigned to services that have **Progress Tracked** set to "No" or if **No Staff Used on this Assignment** is checked on the assignment.

Note: Tracking items can still be used if desired.

STAFF PROGRESS TRACKING LIST

Only items pertaining to staff assigned to services that have **Progress Tracked** set to “Yes” will be shown in the progress tracking list.

ASSIGNMENTS

- When an assignment location with a 9-digit zip code is used, it will now properly find the matching service area using only the first 5 digits of it. [SD-681]
- If the staff are changed/removed on an assignment and there are staff progress records already saved for them, it will remove or replace the progress records for those staff. [SD-685]
- If the staff are changed/removed on an assignment and there are tracking items assigned to them, it will unassign them from the tracking items. [SD-710]
- On the Staff Progress window, a new **Rush/Expedite** checkbox was added. This will come in from the staff ServiceLink Check Out if you integrate with ServiceLink, and will also be sent to ServiceLink if you manually check it. It will show in the staff list at the top of the window as well as in the Check Out information section on the window. This field can be added to the Staff Progress Tracking board as another column in the list. The **Deliver By** date has also been added to the staff list at the top of the progress window. [SD-702]

Staff Progress

Staff Name	Services Provided	Check-In	Check-Out	Rush/Expedite	Deliver By	Turn-In Sheet Completed	Work Co
Adams, Linda P	Videography	8:00 AM	9:00 AM	<input checked="" type="checkbox"/>	07/17/2017		
Erby, Jeffrey M	Stenography*			<input type="checkbox"/>	07/26/2017		

Adams, Linda P

Check In

Checked In By: Checked In On:

Internal Note: Public Note:

Check Out

Actual Start Time: End Time: Length: 1 hour

Billable Hours: Reason:

Delivery Type: Deliver By: Rush/Expedite

Transcript Exhibits Video Staff Note:

Estimated Pages # Exhibits Rough Disk

Transcripts Ordered # Exhibit Pages

- On the Deponent Update window, if you have pre-filled the **# Exhibit Pages** field and then use the **←Add** button to copy over the deponent information from the ServiceLink worksheet, it will not overwrite the contents of this field. [SD-703]
- The YesLaw generator on the assignment files window will now pass the assignment number to the generator. [SD-677]

CLIENT INVOICES

- A new search option was added to the invoice list window to search for invoices with a specific product on it. [SD-694]

STAFF INVOICES

- This **Pay Selected** button is now showing again on the staff invoices list window. Clicking on it will now display a warning message before it displays the payment method prompt. It warns you that the selected staff invoices will be paid in full, regardless of their guarantee type or what clients have paid on the related assignments. [SD-687]

CONFIRMATIONS

- The affiliate assignment number will now print on staff confirmations, if it was entered on the assignment. A field name of **Job.AffiliateJobNumber** was added to use on custom confirmations. [SD-690]
- New preferences were added to exclude the link to MS Outlook appointment ICS files on staff and/or client confirmations. (This is mainly for those having firewall issues when it needs to FTP the ICS file to the Solaria FTP server.) [SD-701]
 - In **Settings → Preferences → Staff** tab, check **Exclude MS Outlook Appointment ICS File Link**.
 - In **Settings → Preferences → Clients** tab, check **Exclude MS Outlook Appointment ICS File Link**.

ASSIGNMENTS

- The **Scheduled By** user name was added to the **Assignments -> Assignments Received** report to show who entered the assignment. [SD-680]
- A new report was added: **Assignments → Import Verbatim Hearing Recording Assignments**. It will import VHR dockets as assignments from an Excel spreadsheet. Note: a VHR company needs to be selected as the current company in order to see this report. [SD-698]

CLIENTS

- A new report was added: **Clients → Email Notifications**. Similar to the **Staff Email Notifications** report, it will email assignment confirmations to all contacts on assignments for a specific date. [SD-686]
- A new report was added: **Clients → Verbatim Hearing Recording Invoices**. This prints parent invoices for VHR companies per specific requirements of theirs. Note: a VHR company needs to be selected as the current company in order to see this report. [SD-682]

STAFF

- When running the **Staff → Email Notifications** report, it will now prompt for including canceled assignments or not when it prompts for the date. If canceled assignments are included, the subject of the emails will say "Assignment Canceled" instead of "New Assignment". [SD-691]
- The **Staff → Payables** report was modified with following: [SD-664]
 1. A checkbox to suppress the \$0 line items was added to the bottom of the "Payables Report Options" window in the **Details to Print** box.
 2. If you have **Print Client Invoice Number on Payables Report** checked in the staff preferences, it will now print the client invoice line item price and amount next to the client invoice number on each line item that is directly related to a client invoice line item.
 3. It will print the staff person's name next to their grand total.
 4. Page numbering was added.
- A new report was added: **Staff → Staff Pay by Assignment**. This prints a summary of the pay given to each staff for a given pay date by assignment, including the rate type and GL code suffix on it. [SD-712]
- A new report was added: **Staff → Staff Usage by Case**. This lists all staff with the assignments taken for a date range sorted by case. [SD-716]

FINANCIAL

- The **Financial → Payment Summary by GL Code** report was renamed to **GL Code Summary for Client Payments**.
- A new report was added: **Financial → GL Code Summary for Staff Pay**. It will total the staff pay per GL code and per payment type. [SD-704]

CLIENTS

- If integrating with ServiceLink, it will now send the “Charge on Delivery” (C.O.D.) setting to ServiceLink for any clients or attorneys that have that set. This will show on the worksheet order in ServiceLink. [SD-714]
- A new tab named **Miscellaneous** was added to the client maintenance window with a few new fields added to it: **EIN, DUNS and BPA**. These fields are used for Verbatim Hearing Reporting companies. [SD-692]

VERBATIM HEARING RECORDING OPTIONS

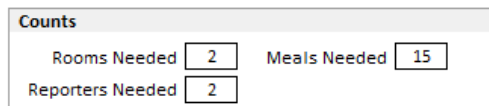
New features were added for Verbatim Hearing Recording companies.

- A new preference was added to **Settings → Preferences → Interfaces** tab to tell Solaria that you **Have a Verbatim Hearing Recording Company**. [SD-682, 698]
- With the above preference on, you will see a **This is a VHR Company** checkbox in the **Other Information** section for companies. Turning this on for a company will display other features available when that company is the being used:
 - A **VHR Info** tab will display on the company details. Here you can enter the information/defaults used for importing dockets for that company.
 - Under **Reports → Assignments** (Dockets), you will see an option to import dockets.
 - Under **Reports → Clients**, you will see an option to export VHR invoices.

ROOM, MEAL AND REPORTER COUNTS ON ASSIGNMENTS

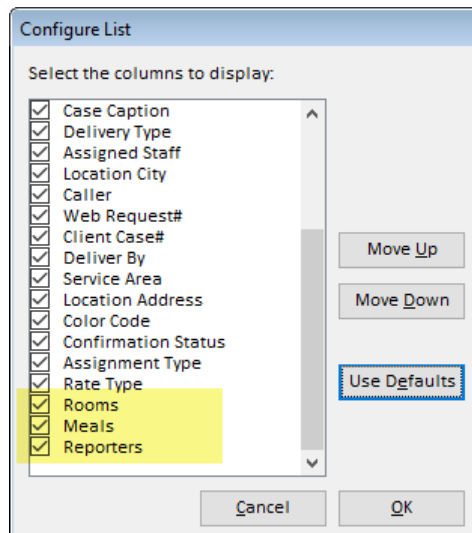
A new feature was added to enter the number of rooms, meals and reporters needed on assignments so you can track that you have the available resources needed each day. [SD-707]

- A new preference was added to **Settings → Preferences → Assignment** tab to **Use Room, Meal and Reporter Counts**. You will also need to set the Reporter Staff Type so it knows which staff are considered reporters in the reporter counts.
- A new section will then show on the Assignment Details window to enter the counts for each of these items.



Counts	
Rooms Needed	2
Meals Needed	15
Reporters Needed	2

- You can configure the Assignments List window to include each of these counts using the configure (cog icon) button on the top-right side of the list.



Configure List

Select the columns to display:

- Case Caption
- Delivery Type
- Assigned Staff
- Location City
- Caller
- Web Request#
- Client Case#
- Deliver By
- Service Area
- Location Address
- Color Code
- Confirmation Status
- Assignment Type
- Rate Type
- Rooms
- Meals
- Reporters

Buttons: Move Up, Move Down, Use Defaults, Cancel, OK

- When viewing the Staff Assignments window, you will see these listed in the **Assignment Information** section.

Staff Assignments	
Assignment Information	
Client: Best Law Firm	Assignment Date: 07/31/2017
Attorney: Attorney, Bob	Start Time: 9:00 AM ET
Location: Best Products	Estimated Length: 1 Hours
2976 Tree Frog Lane Suite 201	Rooms: 2 Meals: 15 Reporters: 2
Kansas City, MO 64106-1234	<input checked="" type="checkbox"/> Print Notes on Confirmations

- When viewing the calendar, you will see a total of these counts at the top of the window for all days shown on the current view.

	Rooms: 9 Meals: 79 Reporters: 11	Monthly
Thursday	Friday	Saturday

It will also show a total at the top of each day when viewing the daily, weekly or monthly view and in the **Assignment Information** section in the manager view.

25
Rooms:3 Meals:27 Reporters:4
(JE) BOOKED OUT
9:00 (JE) Attorney, Bob
10:00 (JE) Attorney, Bob
1

- If a staff person with the reporter staff type selected in preference has an "All Day" time off item on a day, it will ADD 1 to the Reporters Needed count for the day.

ISSUES RESOLVED

- The **Deponents** column of the assignments list window will now properly show '&' in deponent names. [SD-672]
- When viewing the assignments list window with zebra striping turned on, sorting on the Color Code column will maintain showing the colors on each assignment. [SD-696]
- If a staff person is changed/removed on the service of an assignment and they had already been sent a confirmation, it will remove this history so that the service shows they had not been sent the confirmation yet. [SD-711]
- If staff have changed the name of a deponent or entered a new deponent on the ServiceLink worksheet, it will copy the deponent names to Solaria using the correct order of first, middle and last names as specified in preferences. [SD-712]
- When fetching a worksheet with a deleted worksheet order that had already been brought into Solaria, it will no longer return a SQL error. [SD-689]
- Running the **Staff → Email Notifications** report to send confirmations with the **Exclude Other Services** preference turned off will no longer return an error when trying to email a confirmation to more than one staff person. [SD-683]
- When printing client statements in batch (from the Reports section) for all companies and a client has invoices in more than one company, it will no longer print duplicate statements for the client. [SD-684]
- The Client Income by Assignment report will now print the correctly. [SD-713]
- The rate sheet printed from the **Product Prices** window will now print for different options that take the rate types into account. [SD-688]