

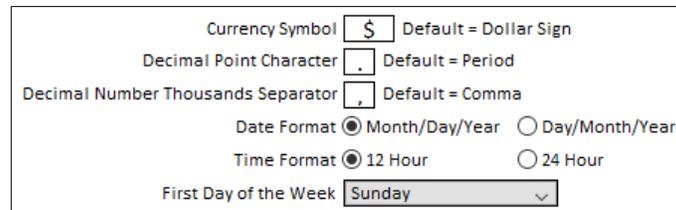
5.90 Release

ENHANCEMENTS

SYSTEM PREFERENCES

- A default case type was added to the Cases tab of System Preferences which will be used whenever new cases are added. [SD-1111]
- New preferences were added to set the currency symbol, decimal point character and decimal number thousands separator for numbers used throughout Solaria for companies outside of the United States. [SD-1108]
- A new preference was added to set the date format to **Day/Month/Year** instead of **Month/Day/Year**. Note this requires a change the SQL Server login that is used. Please contact support for more information. [SD-1127]
- A new preference was added to set the time format to 24 hours instead of 12 hours. [SD-1127]
- A new preference was added to set the starting day of the week to Monday instead of Sunday. [SD-1127]

The above new preferences can be found on the main **Company** tab of System Preferences.



The screenshot shows a dialog box for System Preferences with the following settings:

- Currency Symbol: Default = Dollar Sign
- Decimal Point Character: Default = Period
- Decimal Number Thousands Separator: Default = Comma
- Date Format: Month/Day/Year Day/Month/Year
- Time Format: 12 Hour 24 Hour
- First Day of the Week:

LETTER TEMPLATES

- New fields are available to include the assignment counts in custom staff confirmations. The field names are {Job.MealsNeeded}, {Job.ReportersNeeded} and {Job.RoomsNeeded}. You will see these listed in the field list when setting up the staff confirmation letter templates. [SD-1124]

CATEGORIES AND TYPES

- Rough Disk Statuses were removed from Categories and Types as they were replaced with tracking statuses. [SD-1139]

STAFF MAINTENANCE

- Defaults were added in System Preferences for the three different guarantee types when using split staff pay. When a new staff person is added, it will use the default guarantee types selected in preferences. [SD-622]

ASSIGNMENTS LIST

- The **Location City** column of the assignments list window will now show only the city; a separate column was added for **Location State**. If you had **Location City** visible, the **Location State** column will also be visible by default. Hide or show these columns by clicking on the cogwheel icon button in the top right corner of the list. [SD-1103]
- A new column called **Services** was added to the assignments list window. Show this column by clicking on the cogwheel icon button in the top right corner of the list. It will list the services selected on the each assignment in alphabetical order. If you are also showing the **Assigned Staff** column, these will now be listed in the same order as the services. [SD-449]

ASSIGNMENTS

- When confirming staff or clients on an assignment, it will now display the list of confirmation statuses in alphabetical order. [SD-1105]

STAFF ASSIGNMENTS

- If one or more staff are removed from a service on an assignment, it will now set the following tasks back to incomplete: Assign Staff, Send Email to Staff, Confirm Staff. [SD-1104]

STAFF PROGRESS, DEPONENT UPDATE, ATTORNEYS PRESENT

These windows were modified to not automatically fill in missing information for you and put you into "Unsaved Changes" mode. If the window detects there are items missing, it will show an **Auto Fill** button at the top of the list. Clicking on this will fill in the missing information for you as it used to do when opening the window. This allows you to view the window to see what information is really saved and to allow you to leave the window without being prompted to save changes when you did not make any changes. The only exception to this is when you first open the window after fetching data from ServiceLink and there is information from ServiceLink that can be filled in for you. [SD-1154]

Staff Progress

Staff Name	Auto Fill	Services Provided	Check-In	Check-Out	Rush/Expedite

Staff Progress

Unsaved Changes

Staff Name	Services Provided	Check-In	Check-Out	Rush/Expedite	Deliver By	Turn-In Sheet Completed	Work Completed
Aker, Carol J	Stenography*			<input type="checkbox"/>	02/25/2019		
Ball, Helen T	Videography			<input type="checkbox"/>	02/25/2019		

Aker, Carol J

Check In

Checked In By: Checked In On:

Internal Note: Public Note:

Check Out

Actual Start Time: End Time: Length:

Billable Hours: Reason:

Delivery Type: Deliver By: Rush/Expedite

Transcript Exhibits Video Staff Note:

Estimated Pages: # Exhibits: Rough Disk

Transcripts Ordered: # Exhibit Pages:

Turn-In Sheet

Due Date:

Completed On:

Staff Work

Due Date:

Completed On:

NEW EXHIBIT PAGE RATE TYPES

A new "Exhibit Page Rate" **Unit Type** was added to products. This is used with the "Misc-Paid" or "Misc-Unpaid" **Product Type**. It allows you enter exhibit pages for deponents then have Solaria automatically enter those pages on products that use this unit type. The "Page Rate" unit type was renamed to "Transcript Page Rate". [SD-1100]

These products must be assigned to an **Exhibit Type**. A new option called **Exhibit Types** was added under **Categories and Types** to enter these. Examples of exhibit types are "Black & White", "Color", "Oversized", etc.

1. First, set up your exhibit types.

Set Up Exhibit Types

Description	Remove	Add	Active
Black & White			<input checked="" type="checkbox"/>
Color			<input checked="" type="checkbox"/>
Oversized			<input checked="" type="checkbox"/>

2. Next, assign the exhibit types to your products in **Categories and Types ► Products**.

Set Up Products

Description	Remove	Add	Invoice Description	Product Type	Unit Type	Exhibit Type	Hide	Taxed	Active	GL Code Debit	GL Code Credit	Hide on Turn-In Sheet
Exhibit Scanned			Scanned Exhibits	Misc - Unpaid	Exhibit Page Rate	Black & White	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	500	501	<input type="checkbox"/>

3. In Deponent Update, enter the number of pages for each exhibit type for each deponent. This window has been modified to show a list of deponents at the top and the entry of fields is done in a section at the bottom. (This is similar to the Staff Progress window.) A list of exhibit types was added where you can enter the number of pages and a note for each exhibit type that is relative for the selected deponent.

Deponent Update

Deponents	Select	Remove	Add	Edit	Deposition Time	Billable Hours	Transcript Pages	Exhibit Numbers	Exhibit # Pages	Volume Number	Has Video	Read & Sign	Read & Sign Note
Ted, Witness					Start: 9:30 AM End: 11:45 AM	02:15	1 50	1 1	3		<input type="checkbox"/>	<input type="checkbox"/>	
Garner, Matt					Start: 12:30 PM End: 4:00 PM	03:30	1 100	2 3	12	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Ted, Witness

Deposition Time Start: 12:30 PM End: 4:00 PM

Billable Hours 03:30

Transcript Pages Start: 1 End: 100

Volume Number 1

Has Video

Read & Sign

Read & Sign Note

Exhibits

Exhibit Numbers Start: 2 End: 3

Exhibit # Pages 12

Exhibit Type	# Pages	Notes
Black & White	10	document
Color		
Oversized	2	poster

Print End File Undo Changes Save Changes Filed Originals On [] Synch to ServiceLink Notes

4. When you add a product with the "Exhibit Page Rate" unit type to an order, it will pull in the number of pages for that exhibit type for the deponent.

Order# 43974 Status: 15 DAYS OVERDUE!

Attorney/Client: Brathwaite, William D / BASCO

Bill To Add Edit

Client: BASCO

Attorney: Brathwaite, William D

Client Balance: \$ 721.80 Attorney Balance: \$ 0.00 Credit Limits

Address Add Edit

Type: Mailing

Address: 4799 Timber Ridge Road
McClellan, CA 95652

Ship To

Same as Billing Client: BASCO

Attorney/Contact: Brathwaite, William D

Address

Type: Mailing

Address: 4799 Timber Ridge Road
McClellan, CA 95652

Shipping Terms

Assignment Delivery Type: Normal Ordered On: 04/06/2019 Assignment Type: Deposition

Delivery Type: 9 day Expedite Deliver By: 03/22/2019 Completed On: Invoice Print Type: Partial Details (No Qty)

Shipping Method: FedEx Shipped On: Tracking #: Client Case#:

Deponent	Remove	Add	Product	Clear List	Standing Order	Same as Last Order	Select Template	Units	Unit Type	Qty
Garner, Matt	▼		Attendance					3.50	Hourly Rate	1.00
Garner, Matt	▼		Exhibit Scanned					10.00	Exhibit Page Rate	1.00
Garner, Matt	▼		Original & One E-Transcript					100.00	Transcript Page Rate	1.00

Edited on 04/06/2019 9:19 PM Master User

5. If the product is set up as "Misc-Paid", the staff will see the "Exhibit Page Rate" on their invoice as well.

Invoice #32583 for Erby, Jeffrey M Status: 24 DAYS OVERDUE!

Assignment Information

Assignment Date: 03/11/2019 Work Completed On: 03/21/2019

Start Time: 14:00 MT Billable Hours: 3.50 Hours

Case: Cynthia Barber VS Body Fate

Invoice Client/Location Services

Pay Template: 70% Deposition Non-Guar. Pay If Client Paid

Print Type: Full Details Group by Deponent Turn Off Auto Updates

Order	Pay Items	Remove	Add	Prod Type	Pay Type	Delivery Type	Units	Qty	Pay Rate	Amount
43970	Matt: Attendance-Minimum Fee	▼		MISP	Percentage	Normal	160	1	70.0%	\$ 112.00
43970	Matt: Original & One Copy PDF	▼		TRAN	Percentage	Normal	450	1	70.0%	\$ 315.00
43973	Witness: Exhibit Special Paid	▼		MISP	Exhibit Page Rate	9 day Expedite	3	1	\$ 5,000	\$ 15.00
43974	Matt: Attendance	▼		MISP	Hourly Rate	9 day Expedite	3.5	1	\$ 75,000	\$ 262.50
43974	Matt: Original & One E-Transcript	▼		TRAN	Percentage	9 day Expedite	750	1	70.0%	\$ 525.00

REPORTS

- The **Assignments Processed per Scheduler** report will now allow you to filter the report on selected users and/or selected assignment types. [SD-1125]
- A new Staff report was added called **Average Billable Hours Per Assignment Per Service**. It lists the average billable hours per checked out assignments in a date range per service for staff. [SD-1116]
- A new Staff report was added called **Invoice Balances by Guarantee Type**. It lists staff invoice balances for each guarantee type for invoices sent or due on or before a cut-off date. Options are available to select which staff and guarantee types to include. If you use split pay for staff invoices, you will also select the product type to report on (originals, copies or miscellaneous). [SD-1123]

ISSUES RESOLVED

- The Daily, Weekly and Manager views of the calendar will now calculate the ending times of assignments to the nearest quarter hour instead of to the nearest hour. [SD-1148]

- The **End Time** column in the Assignments List will now round to the quarter hour when partial hours are entered for the **Length** of an assignment. [SD-1143]
- After entering an attorney on a new assignment then also entering them as the caller, it will no longer clear their name from the caller field. This only happened if they had contacts of their own but were not saved as a contact yet themselves. (The attorney could still be selected from the caller drop-down list.) [SD-1152]
- When opening an assignment request from ServiceLink that has an expected **Deliver By Date** entered for it, it will now calculate the proper **Delivery Type** to use. [SD-1149]
- When using the **Email Files** button on the Assignment Files window, it will now remember the files you had selected prior to clicking on the button and show those files selected on the Email Files window. [SD-1112]
- Worksheet items shown on the tracking board that are not due yet will no longer show in red text. [SD-1122]
- Hard returns found in order notes will now display as spaces in the Order list window **Order Notes** column. [SD-1136]
- When saving a staff invoice without making any changes and the invoice has not been sent to ServiceLink yet, it will now send the invoice to ServiceLink upon the save. [SD-1151]
- When entering the cutoff date for the Staff **Payables Audit** report, it will now display the date selected when using the calendar button. [SD-1141]
- The **Staff Service History** report will no longer print the services on top of the next line below it when it needs to wrap over more than one line. [SD-1142]

5.90.019

- When using the **Select** button on an empty Attorneys Present window, it will no longer result in SQL errors when saving. [SD-1161]

5.90.020

- Some fields showing time within the assignment windows will now show the time in 12 hour format instead of 24 hour format when the 12 hour format is selected in System Preferences (which is the default). [SD-1163]
- The name of the deponent shown on the bottom half of the Deponent Update window will now accurately reflect the name of the deponent selected in the list at the top of the window. [SD-1164]

5.90.021

- When using the **Add** button on an empty Attorneys Present window, it will now save the fields entered correctly. [SD-1168]

5.90.023

- When editing a contact in the Edit Contact pop-up window, it will no longer check the ServiceLink delegation information if the client has full delegation turned on. [SD-1180]
- When a pending order from ServiceLink is opened and it contains exhibit page rate products for more than one deponent, it will now enter each deponents exhibit pages from Deponent Update correctly on their exhibit order items. [SD-1182]