



BEC CoreRelate 6.0

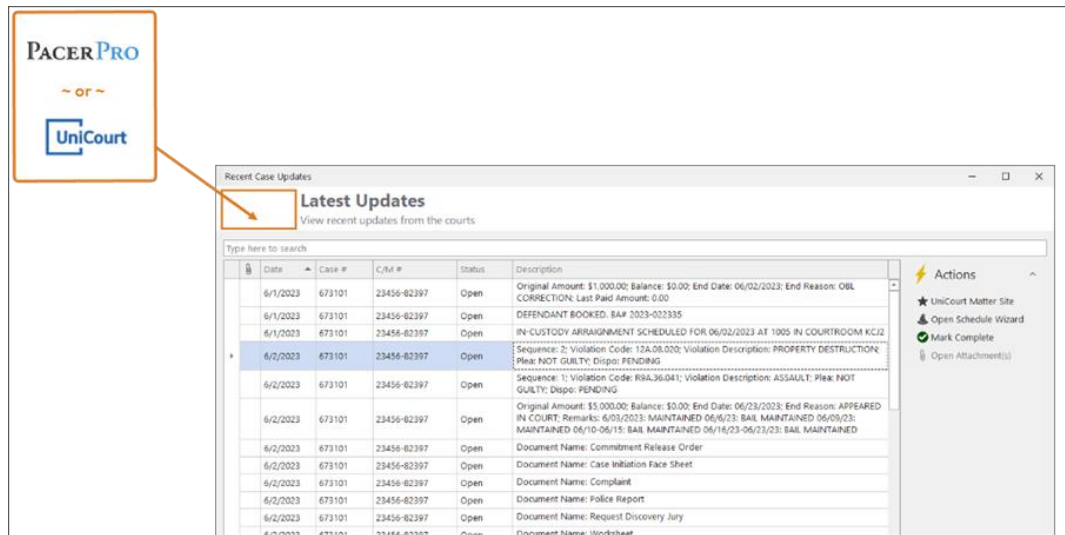
NEW features:

- [Integration with Electronic Court Filing Providers](#)
- [Matter Email Template](#)
- [Pleading Index Tracker](#)
- [MatterLink/Docket Web Task Pane](#)

Integration with Electronic Court Filing Providers

New in release 6, Docket Enterprise and MatterLink provide easy access to court filing updates from two prominent ECF providers, **PacerPro** and **UniCourt**.

The new **Latest Updates** dialog displays new filing information for all matters that are set up in MatterLink to receive ECF updates.



Latest Updates is a place for your docketing department (or any staff member who is responsible for scheduling) to check court updates on a regular basis. From here, the

docketing professional can read the newest court filing information, determine if anything should be tracked in Docket Enterprise, and jump right to the Schedule Wizard when needed.

Here is how it works:

1. On the Matter Details screen, the matter is subscribed by entering the court's case number.

Matter Editor: The City of Seattle vs Conrad, Peter Vernon

Matter Details 23456-82397

Client Name: UniCourt Client
Matter Short Title: The City of Seattle vs Conrad, Peter Vernon

Details | Schedule | Notes | Users | Related Parties | Fields | Recipients | Links | Documents | Workplans | Assignments

General and Billing

Client Billing ID: 23456 Client Name: UniCourt Client
Matter Billing ID: 82397 Matter Name: The City of Seattle vs Conrad, Peter Vernon
SubMatter: Parent Matter: Type here to search
Short Title: The City of Seattle vs Conrad, Peter Vernon
Long Title:
Nickname:
Attorney: Type here to search
Matter Status: Open
Opened On: 6/5/2023 11:22 AM Closed On:
Created by 'jmeier' on 6/5/2023 11:22 AM Modified by 'jmeier' on 6/5/2023 11:23 AM

Classification

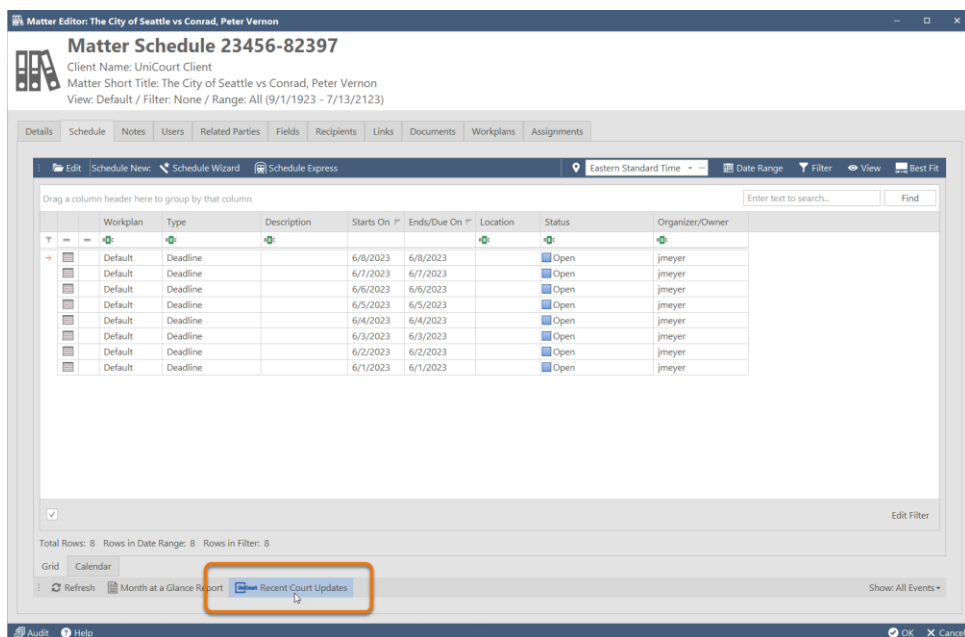
Practice: Jimmy Practice Department:
Matter Type: Site:

Case Info

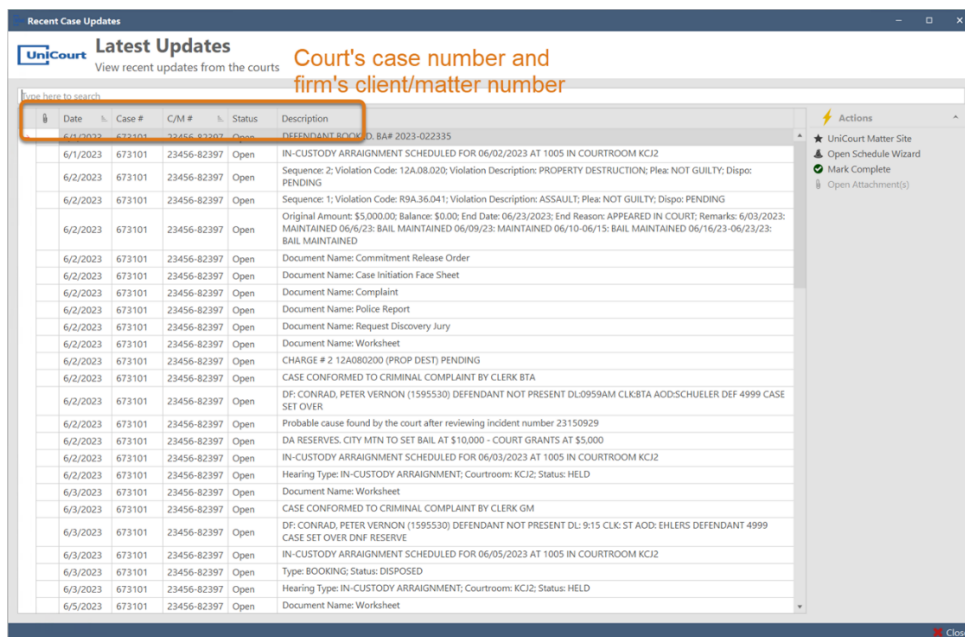
Court: Type here to search Ref. Number:
Judge: Type here to search Case Number: 673101 Unsubscribe
Case Date:
Case Status:
Case Opened On:
Case Closed On:
Private

Audit | Matter Summary Report | Help

- When the matter/case is subscribed, the *Recent Court Updates* button becomes visible on the Matter Editor Schedule tab. This button opens the *Latest Updates* dialog.

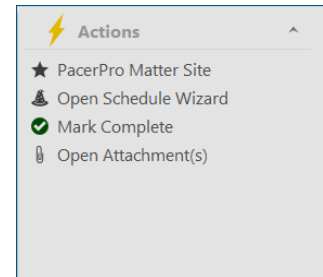


- Court filing information is displayed on the *Latest Updates* dialog. Immediately after “subscribe” it brings in the previous 7 days’ information from the court. After that, the service updates the court data every two hours.



4. From the *Latest Updates* dialog's Actions pane, you can:

- Open the ECF provider's website, directly to the page for the same case. (This is shown for both providers in the screen captures below.)
- Open the Schedule Wizard with the matter already known and ready to select the appropriate workplan.
- Mark the selected item complete. (Note this "dismisses" it from the list completely. It cannot be re-accessed here; however, it is still available on the provider's case page.)
- Open the selected items' PDF attachments in in your browser (no need to move to the DM system for just a quick look.)



Latest Updates with Provider Case Pages

UniCourt Latest Updates
View recent updates from the courts

Date	Case #	CM #	Status	Description
6/1/2023	673101	23456-82397	Open	DEFENDANT BOOKED: BAP 2023-022335
6/1/2023	673101	23456-82397	Open	IN-CUSTODY ARRAIGNMENT SCHEDULED FOR 06/02/2023 AT 1005 IN COURTROOM KCJ2
6/2/2023	673101	23456-82397	Open	Sequence: 2: Violation Code: 12A.08.020: Violation Description: PROPERTY DESTRUCTION: Plea: NOT GUILTY: Dispo: PENDING
6/2/2023	673101	23456-82397	Open	Sequence: 1: Violation Code: R6A.36.041: Violation Description: ASSAULT: Plea: NOT GUILTY: Dispo: PENDING
6/2/2023	673101	23456-82397	Open	Original Amount: \$5,000.00: Balance: \$0.00: End Date: 06/23/2023: 1: MAINTAINED 06/02/23: BAIL MAINTAINED 06/09/23: MAINTAINED 06/09/23: BAIL MAINTAINED
6/2/2023	673101	23456-82397	Open	Document Name: Commitment Release Order
6/2/2023	673101	23456-82397	Open	Document Name: Case Initiation Face Sheet
6/2/2023	673101	23456-82397	Open	Document Name: Complaint
6/2/2023	673101	23456-82397	Open	Document Name: Police Report
6/2/2023	673101	23456-82397	Open	Document Name: Request Discovery Jury
6/2/2023	673101	23456-82397	Open	Document Name: Worksheet
6/2/2023	673101	23456-82397	Open	CASE CONFORMED TO CRIMINAL COMPLAINT BY CLERK ETA
6/2/2023	673101	23456-82397	Open	OF: CONRAD, PETER VERNON (1595330) DEFENDANT NOT PRESEN SET OVER
6/2/2023	673101	23456-82397	Open	Probable cause found by the court after reviewing incident number 2
6/2/2023	673101	23456-82397	Open	DA RESERVES CITY MTN TO SET BAIL AT \$10,000 - COURT GRANTS
6/2/2023	673101	23456-82397	Open	IN-CUSTODY ARRAIGNMENT SCHEDULED FOR 06/02/2023 AT 1005
6/2/2023	673101	23456-82397	Open	Hearing Type: IN-CUSTODY ARRAIGNMENT: Courtroom: KCJ2: Status
6/3/2023	673101	23456-82397	Open	Document Name: Worksheet
6/3/2023	673101	23456-82397	Open	CASE CONFORMED TO CRIMINAL COMPLAINT BY CLERK GM
6/3/2023	673101	23456-82397	Open	OF: CONRAD, PETER VERNON (1595330) DEFENDANT NOT PRESEN CASE SET OVER DMF RESERVE
6/3/2023	673101	23456-82397	Open	IN-CUSTODY ARRAIGNMENT SCHEDULED FOR 06/05/2023 AT 1005
6/3/2023	673101	23456-82397	Open	Type: BOOKING: Status: DISPOSED
6/3/2023	673101	23456-82397	Open	Hearing Type: IN-CUSTODY ARRAIGNMENT: Courtroom: KCJ2: Status
6/5/2023	673101	23456-82397	Open	Document Name: Worksheet

Actions

- ★ PacerPro Matter Site
- 👤 Open Schedule Wizard
- ✅ Mark Complete
- 📎 Open Attachment(s)

UniCourt
Search by Keyword, Case, Party, Attorney

Search Results: THE CITY OF SEATTLE vs CONRAD, PETER VERNON

This case is up-to-date.

THE CITY OF SEATTLE vs CONRAD, PETER VERNON

DOCKET DOCUMENTS²² PARTIES ATTORNEYS DOCKET HISTORY RELATED CASES

Case Number: 673101

Case Status: NOT YET CLASSIFIED

Filing Date: 06/02/2023

Jurisdiction: Washington - Not Yet Classified

Courtroom: Not Yet Classified

Case Type: Not Yet Classified

Docket Entries

Search Docket

Type Date Documents Docket Entries

Docket 06/01/2023 IN-CUSTODY ARRAIGNMENT SCHEDULED FOR 06/02/2023 AT 1005 IN COURTROOM KCJ2

The screenshot shows the PACERPRO interface. At the top, a 'Recent Case Updates' dialog box is open, displaying a table of updates. One entry is highlighted with an orange box: 9/1/2023, 4:18-cv-06972-JST, 123.002, Open. Below this, the main case page for 'Holley et al v. Gilead Sciences, Inc.' is shown. The case is from the California Northern District Court, Hon. Jon S. Tigar. The docket entries section is visible, showing several entries with dates and descriptions. The case number '4:18-cv-06972-JST' is highlighted in an orange box in the top right corner of the case page.

Latest Updates as a Daily Queue

The *Latest Updates* dialog can act as a court filing “daily queue” to be reviewed and acted on. It can be moved to a second monitor and remain visible while you read each filing, scan the attachments, and work in the docketing Schedule Wizard.

All Subscribed Matters

When opened from the main BEC CoreRelate Suite menu, the Latest Updates dialog provides updates for *all subscribed* matters. In this context, it is an effective queue if your firm has a centralized docketing department.

The screenshot shows the BEC CoreRelate Suite menu. The 'Client & Matter' tab is selected. In the 'Create New' section, the 'Latest Updates' option is highlighted with an orange box. Above the menu, a callout box contains the PACERPRO logo, followed by '~ or ~', and then the UniCourt logo. An orange arrow points from the callout box to the 'Latest Updates' option in the menu.

My Subscribed Matters

If your firm's docketing tasks are not centralized, you can open the Latest Updates dialog from the CoreRelate menu and then filter it to show updates only for matters you are interested in. To do this, click the **Only show my matters** checkbox.

PACERPro Latest Updates
View recent updates from the courts

Type here to search

Date	Case #	C/M #	Status	Description
8/22/2023	4:18-cv-06972-JST	123.002	Open	NOTICE of Voluntary Dismissal Without Prejudice Pursuant to Federal Rule of Civil Procedure 41(a)(1)(A)(i) as to the Claims of the Plaintiffs Listed on Exhibit A by Adrian Holley (Attachments: # (1) Exhibit A)(Hilliard, Robert) (Filed on 8/22/2023) (Entered: 08/22/2023)
8/22/2023	4:18-cv-06972-JST	123.002	Open	STIPULATION WITH PROPOSED ORDER re [1291] Second MOTION to Dismiss Defendant Gilead Sciences, Inc.'s Notice of Motion and Second Motion to Dismiss the Claims of Certain Plaintiffs for Failure to Respond to Plaintiff Fact Sheet Deficiency Notices filed by Adrian Holley. (Attachments: # (1) Exhibit 1)(Hilliard, Robert) (Filed on 8/22/2023) (Entered: 08/22/2023)
8/22/2023	4:18-cv-06972-JST	123.002	Open	ORDER re [1358] Joint Administrative Motion to File Under Seal Pursuant to Civil L.R. 7-11 and 79-5 filed by Gilead Sciences, Inc. Responses due by 8/29/2023. Signed by Judge Jon S.

☐ Only show my matters

Actions

- PacerPro Matter Site
- Open Schedule Wizard
- Mark Complete
- Open Attachment(s)

Close

ECF Provider Configuration

Configuration for the ECF integration is simple - it requires credentials for your firm's account with either of these ECF providers. This is entered on the Docket Enterprise Administrative Options dialog's new *Court Feeds* tab.

Administrative Options

Use this form to change product wide settings and use administrative utilities.

CalendarRules Schedule Sync Free/Busy Exclusion **Court Feeds**

Court Feed System: PacerPro

Email: jn

Password: *****

☒ Show the 'Mark Complete' button to Core Users

Administrative Options

Use this form to change product wide settings and use administrative utilities.

CalendarRules Schedule Sync Free/Busy Exclusion **Court Feeds**

Court Feed System: UniCourt

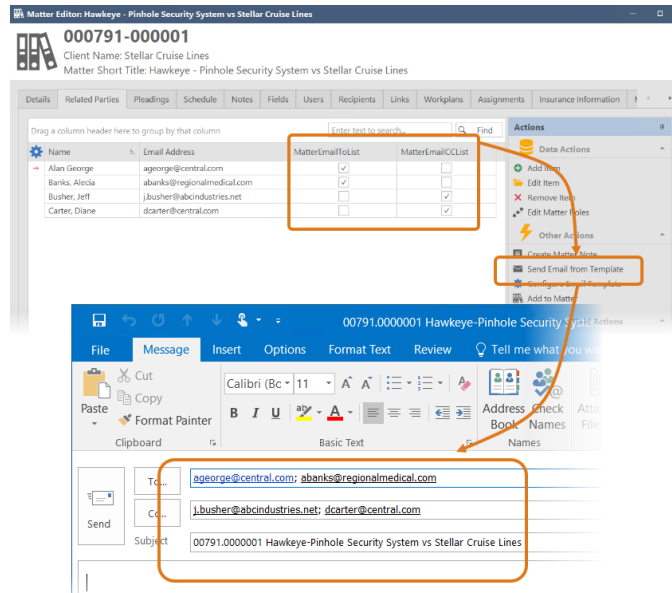
Client ID: rx

Client Secret: *****

☒ Show the 'Mark Complete' button to Core Users

Matter Email Template

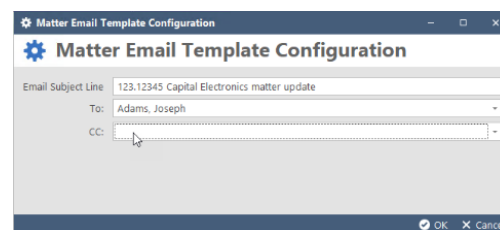
The new **Matter Email Template** feature offers a simple and efficient way to correspond with users and contacts who are interested in the status, progress, or new developments in a matter. On the *Matter Editor Related Parties* and *Users* tabs, a new Action panel link opens an Outlook mail message that is already populated with matter-based subject line, recipients, and carbon copy recipients.



If the Send Email from Template link is used from the Related Parties tab, appropriate users are included too, and vice versa.

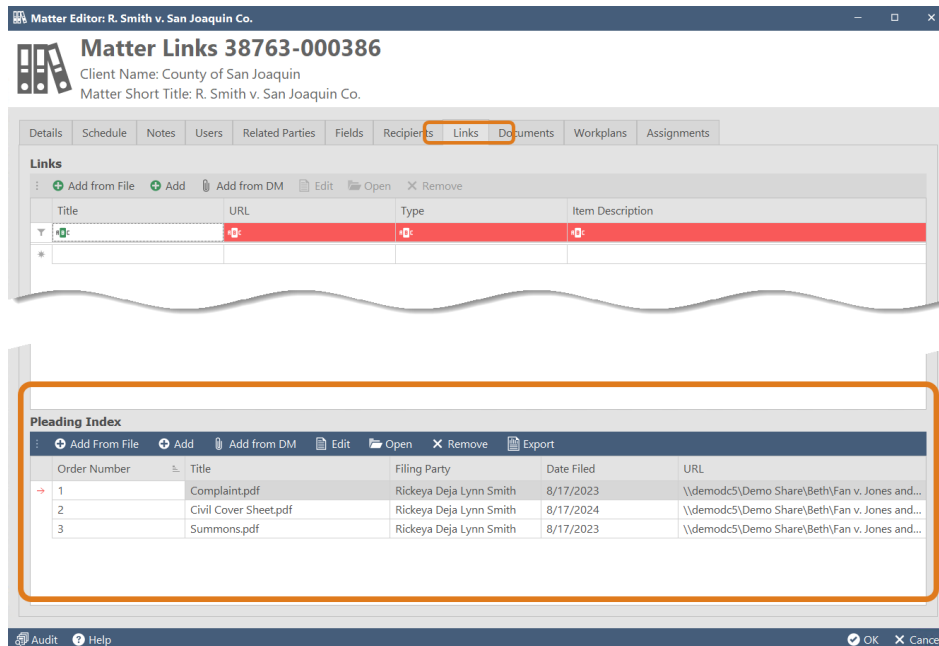
The matter-based email settings are based on a template that is configured on the *Matter Email Template Configuration* dialog, which is also opened from an Action link.

The template is configured for each matter where email correspondence settings are needed.



Pleading Index Tracker

The new **Pleading Index “tracker”** is a special place to create and maintain a list of pleadings for a case, located in a new panel on the *Matter Editor Links* tab. This is a great way to keep track of your matter pleadings inside a MatterLink matter (a new feature for your MatterLink-provided *electronic matter file*.)



You can add document links to the pleading list using the *Add*, *Add from DM*, and *Add from File* buttons.

As documents are selected and links created, the *Pleading Editor* dialog pops up to collect information needed for a pleading index: Order Number, Document Title, Filed Date, Filing Party, and URL.

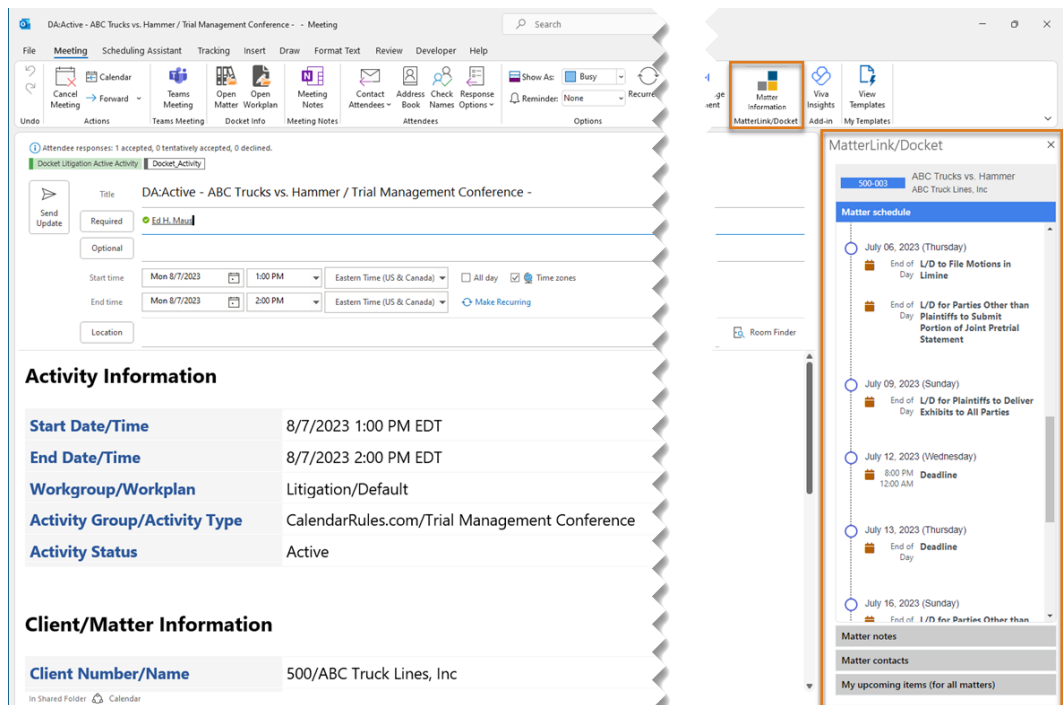
When the Pleading Index document is needed, you can quickly export the list to an Excel spreadsheet from MatterLink.

The 'Pleading Editor' dialog box is shown, with the following fields filled out:

- Order Number: 4
- Document Title: Motion.pdf
- Filed Date: 8/17/2023
- Filing Party: Rickeya Deja Lynn Smith
- URL: ... n v. Jones

MatterLink/Docket Web Task Pane

A new task pane opens inside an Outlook calendar item and displays related matter and schedule information from MatterLink and Docket Enterprise. It is convenient, easy to read, and chock full of information



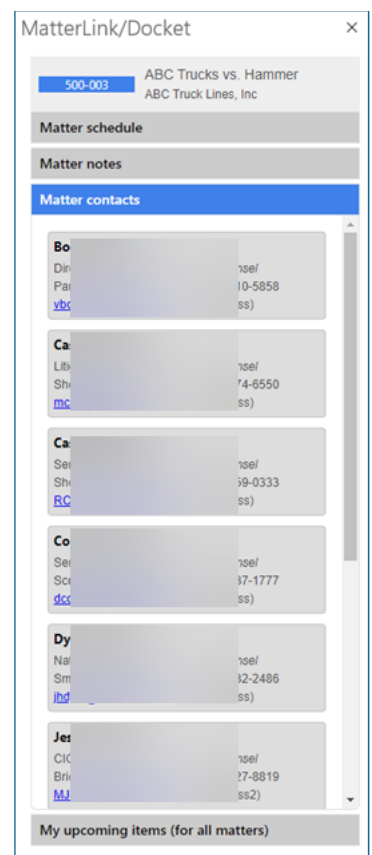
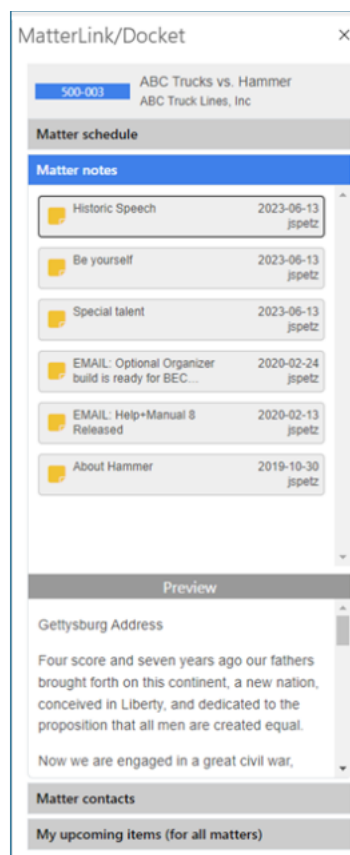
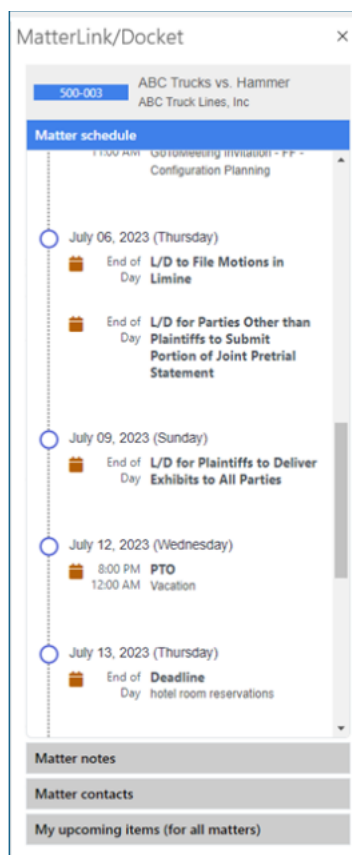
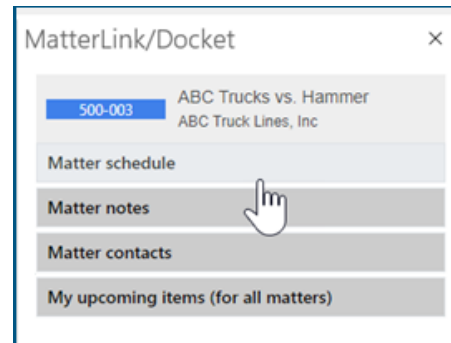
The task pane is a web-based Outlook add-in, which has better performance than a traditional add-in and provides a great user experience.

It relies on a new server-based application, MatterLink/Docket web task pane, and the BEC CoreRelate API. Both must be installed on your on-premises IIS server. For more information, refer to our MatterLink/Docket Web Task Pane Installation Guide or contact support@beclegal.com.

The task pane is compatible with CoreRelate 5 as well as CoreRelate 6.

For calendar items that are from Docket Enterprise, the task pane includes:

- All upcoming schedule items for the same matter
- Matter notes
- Matter contacts
- Your upcoming schedule items from Docket Enterprise (all matters)



For calendar items that are *not* from Docket Enterprise (*ie, not connected to a matter*), the task pane simply shows your individual schedule (upcoming schedule items from Docket Enterprise for all matters.)

