

(57) Abrégé(suite)/Abstract(continued):

generate a court calendar of event dates that is transmitted to the user. In one embodiment of a court date server, the court date server is coupled to a user database (106). The court date server stores the court calendar in the user database for later retrieval and use by the user (112). In addition, the court date server uses the stored court calendar to generate court date reminder that are sent to the user and to send notifications to the user when court rules are modified that affect the user's already calculated court dates. A Date Calculation Engine (DCE) is coupled to a court date server for generation of the court dates. The court rule database includes formulas written in a Date Calculation Scripting Language (DCSL) for calculating the court dates. The court rules further include instructions for generating a Jurisdiction Selection Expert (JSE) and an Event Selection Expert (ESE) that enable a user to quickly select a jurisdiction and an event using hierarchal data structures. The DCE is combined with other software components to build a complete court date server system (100).

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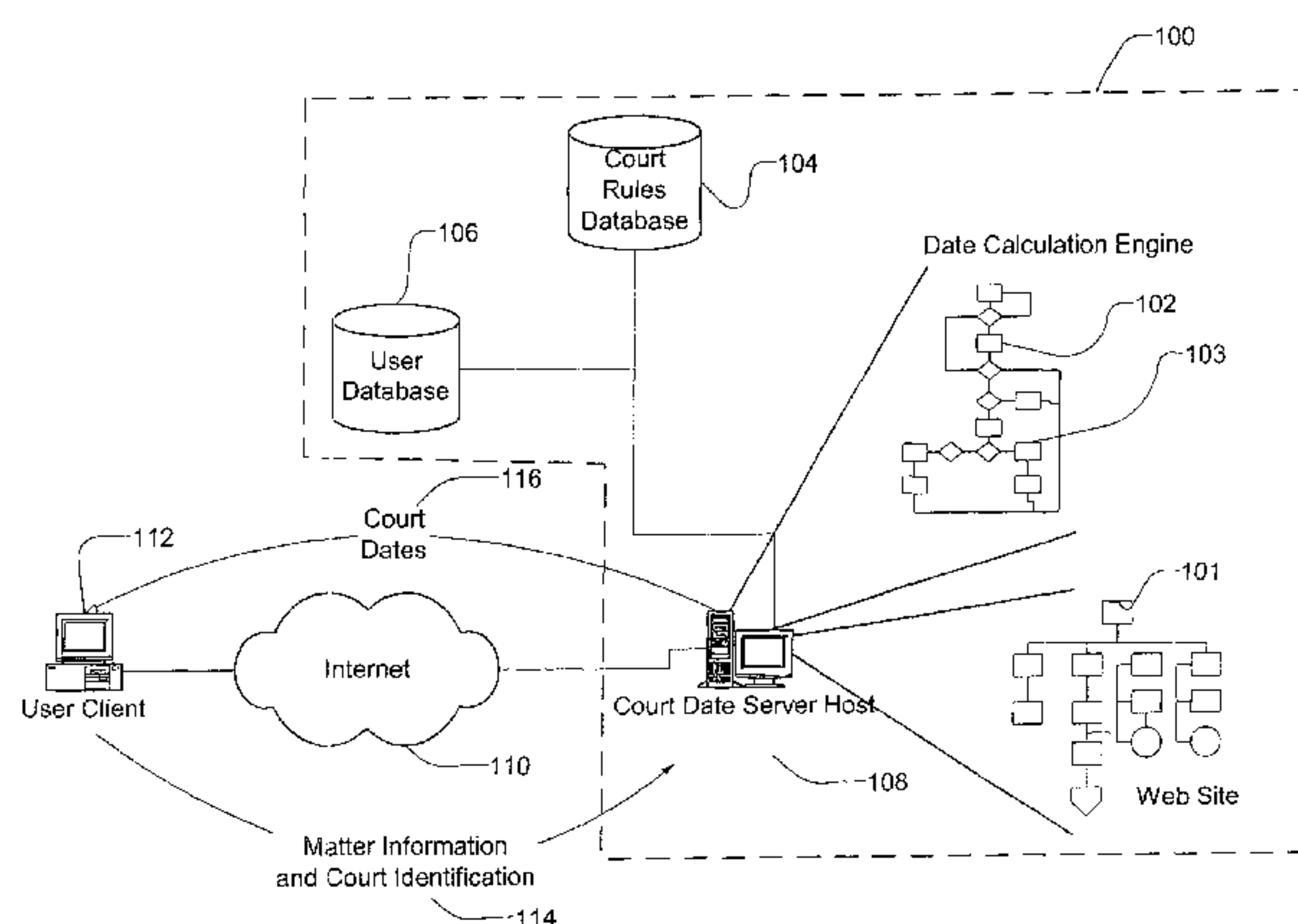
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(54) Title: METHOD AND APPARATUS FOR MANAGEMENT OF COURT SCHEDULES



(57) Abstract: A method and apparatus for generating court calendars. A court date server (108) is coupled to a database (104) of court rules for generation of court dates (116). A user (112) accesses the court date server via a communications network and submits event and jurisdiction data to court date server (108). The court date server (108) uses the event data and the jurisdiction data to generate a court calendar of event dates that is transmitted to the user. In one embodiment of a court date server, the court date server is coupled to a user database (106). The court date server stores the court calendar in the user database for later retrieval and use by the user (112). In addition, the court date server uses the stored court calendar to generate court date reminder that are sent to the user and to send notifications to the user when court rules are modified that affect the user's already calculated court dates. A Date Calculation Engine (DCE) is coupled to a court date server for generation of the court dates. The court rule database includes formulas written in a Date Calculation Scripting Language (DCSL) for calculating the court dates. The court rules further include instructions for generating a Jurisdiction Selection Expert (JSE) and an Event Selection Expert (ESE) that enable a user to quickly select a jurisdiction and an event using hierarchal data structures. The DCE is combined with other software components to build a complete court date server system (100).

METHOD AND APPARATUS FOR MANAGEMENT OF COURT SCHEDULES

CROSS-REFERENCE TO RELATED APPLICATION

This application claims the benefit of U.S. Provisional Application No.60/306,677 filed on July 20, 2001, which is hereby incorporated by reference as if set forth in full herein.

BACKGROUND OF THE INVENTION

This invention relates generally to the field of docket scheduling for the legal profession and more specifically to calculating court dates such as court deadlines.

The timing between a sequence of events of most legal matters, such as a lawsuit, are defined by court rules originating from statutes, by local court rules originating in a local jurisdiction, and by individual court rules created by individual judges. These court rules may vary by the type of legal matter, by mutual consent of the parties involved in the matter, and by decree of a judge overseeing a matter. Failing to meet a deadline for an event defined by a court rule may result in a procedural error that is fatal to a party's position in the legal matter. Therefore, members of the legal professions place great emphasis and importance in meeting deadlines defined by the court rules.

The complexity and multiple sources of court rules creates a management problem for a legal practitioner. If a legal practitioner intends to successfully meet each and every deadline date in a matter, the legal practitioner must be aware of each court rule in each court, and the legal practitioner must be able to accurately calculate a court date using a set of court rules. In addition, the court rules may change in time, necessitating a recalculation of a matter's dates. While an automated court calendar generation system may be used to encapsulate the court rules and relieve the legal practitioner from understanding the complexity of the court rules, some legal practitioners may not have the resources to create such an automated system. Also, even if a legal practitioner does have the necessary resources to create a court calendar generation system, the legal practitioner may not want to maintain such a complex system.

SUMMARY OF THE INVENTION

In one aspect of the invention, a court date server is coupled to a database of court rules for generation of court dates. A user accesses the court date server via a communications network and submits event and jurisdiction data to the court date server. The court date server uses the event data and the jurisdiction data to generate a court calendar of event dates that is transmitted to the user. In one embodiment of a court date server, the court date server is coupled to a user database. The court date server stores the court calendar in the user database for later retrieval and use by the user. In addition, the court date server uses the stored court calendar to

1 generate court date reminders that are sent to the user and to send notifications to the user when court rules are modified that affect the user's already calculated court dates.

In another aspect of the invention, a method of generating a court calendar by a court date server coupled to a user client over a communications network is provided. A court rule database
5 coupled to the court date server. A user accesses the court date server via the communications network and transmits event data and jurisdiction data to the court date server. In response, the court date server gets a court rule from the court rule database and generates an event date using the event data, the jurisdiction data, and the court rule.

In another aspect of the invention, a user database having user data for a user is coupled
10 to the court date server and the court date server puts the event date into the user database associated with the user data.

In another aspect of the invention, the court date server provides reminder messages to the user. To do so, the user data further includes a user electronic mail address for the user. The court date server gets the event date and the user electronic mail address from the user database
15 and generates a reminder electronic mail message and transmits the reminder electronic mail message to the user. The reminder electronic mail message includes a reminder response link that the user selects to transmit a user reminder response to the court date server in order for the court date server to track reminders sent to, and received by, the user.

In another aspect of the invention, an administrator may update the court rules thus
20 affecting a user's previously calculated event date. The court date gets the event date by the court date server from the user database and generates an updated event date using the event date and the updated court rule. The court date server then generates a notification electronic mail message using the updated event date transmits the notification electronic mail message to the user via the communications network using the user electronic mail address. The notification
25 electronic mail message includes a notification response link that the user selects to transmits a user notification response to the court date server in order for the court date server to track notifications transmitted to the user.

In another aspect of the invention, the court date server receives user billing data for a user and generates an event generation charges document including a proposed charge to the user for
30 generating event dates. The court date server transmits the event generation charges document to the user and receives a user acceptance in response. The court date server then generates an event date list using the generated event date and transmits the event date list to the user via the communications network.

In another aspect of the invention, a court date server for generating a court calendar is
35 provided. The court date server is coupled to a user client over a communications network, locally coupled to a court rule database, and locally coupled to a user database with the user

1 database having user data for a user. The court date server has a processor coupled to a memory. The memory has processor executable program instructions stored in it. The program instructions implement the features of the court date server. In operation, the court date server receives event data and jurisdiction data from the user client via the communications network.

5 The court date server then gets a court rule from the court rule database using the event data and the jurisdiction data and generates an event date using the event data and the court rule. The court date server then puts the event date into the user database associated with the user data. The court date server uses the event date to generate an event date list and transmits the event date list to the user via the communications network. The court date server then uses the stored

10 event date to and a user electronic mail address to transmit reminder electronic mail messages and change notification electronic mail messages to the user. The court date server also tracks the reminder and change notification electronic messages transmitted to the user.

In another aspect of the invention, a Date Calculation Engine (DCE) is coupled to a court date server and a court rule database for generation of court dates. The court rule database

15 includes formulas written in a Date Calculation Scripting Language (DCSL) for calculating the court dates. The court rules further include instructions for generating a Jurisdiction Selection Expert (JSE) and an Event Selection Expert (ESE) that enable a user to quickly select a jurisdiction and an event using hierarchal data structures. The DCE is combined with other software components to build a complete court date server system.

20 In one aspect of the invention, a method is provided for calculating a court date by a court date server using a DCE. The method includes receiving event data for an event and a court rule for the court date. The court rule has event date calculation instructions for calculating the court date. The DCE calculates the court date using the event date calculation instructions and the event data.

25 In another aspect of the invention, trigger events and branching trigger events are used to control the execution of the DCE. The method further includes calculating a plurality of court dates related to the trigger event. A branch trigger event can be related to a branch trigger. Calculation of a branching trigger event date triggers the calculating a plurality of additional court dates for the branching trigger event.

30 In another aspect of the invention, the date calculation instructions are included in a formula including a date calculation expression written in a Date Calculation Scripting Language (DCSL). The DCSL has a plurality of statements for calculating dates. An "ADJUST" statement to adjusts a date a specified number of units in a specified direction. An "ADJUSTDOW" statement adjusts a date to a specified day of the week. An "ADJUSTHOLIDAY" statement

35 adjusts a specified date to a next or previous court workday. An "ADJUSTSPECIAL" statement is used to adjust a specified date to a date defined at a matter level. An "ADJUSTWMY"

1 statement adjusts a date to the end or beginning of a week. An "ASSIGNMENT" operator assigns
a date to a variable. A "CALCDATE" statement calculates a date based on another date. A
"COMPLETE" statement completes a date using a specified formula. A "DATEDIFF" statement
5 finds a difference in days between two dates. A "DELETE" statement deletes a date calculated
using a specified formula. An "EARLIER" statement returns an earliest date from a set of dates.
A "GETDATE" statement retrieves a date of an event whose calculation is based on a specified
formula. An "IF condition THEN action block" statement is a conditional statement that takes
a date or a statement returning a date as a test condition. An "IF [NOT] EXISTS" condition
10 statement tests the existence of a date. A "LATER" statement returns a later date from a set of
dates. A "NOTAPPLICABLE" statement marks a date so that the date is no longer calculated.

In another aspect of the invention, date calculation methods are implemented on a data
processing system using a date calculation engine. The data processing system has a processor
and a memory coupled to the processor. The memory has program instructions stored therein
with the processor being operable to execute the program instructions. The program instructions
15 implement the features of a date calculation engine.

BRIEF DESCRIPTION OF THE DRAWINGS

FIG. 1 is a diagram of an application service provider embodiment of a court date server
in accordance with an exemplary embodiment of the present invention;

20 FIG. 2 is Web site diagram of a court date server in accordance with an exemplary
embodiment of the present invention;

FIG. 3 is a calendar date options page as used by an exemplary embodiment of the present
invention;

FIG. 4 is a Matter Management page as used by an exemplary embodiment of the present
25 invention;

FIG. 5 is a Matter List page in accordance with an exemplary embodiment of the present
invention;

FIG. 6 is a Matter Information page as used in an exemplary embodiment of the present
invention;

30 FIG. 7 is a Matter Recovery page in accordance with an exemplary embodiment of the
present invention;

FIG. 8 is an Event Management page in accordance with an exemplary embodiment of the
present invention;

FIG. 9 is an Event List page in accordance with an exemplary embodiment of the present
35 invention;

FIG. 10 is a page used to add an event in accordance with an exemplary embodiment of

1 the present invention;

FIG. 11 is an event edit page in accordance with an exemplary embodiment of the present invention;

5 FIG. 12 is a screen capture of a Jurisdiction Selection Expert in accordance with an exemplary embodiment of the present invention;

FIG. 13 is a screen capture of an Event Selection Expert in accordance with an exemplary embodiment of the present invention;

FIG. 14 is an Event Generation Charges page in accordance with an exemplary embodiment of the present invention;

10 FIG. 15 is a group selection process in accordance with an exemplary embodiment of the present invention;

FIG. 16 is a Verify Events page in accordance with an exemplary embodiment of the present invention;

15 FIG. 17 is an Event Maintenance Log page in accordance with an exemplary embodiment of the present invention;

FIG. 18 is an Event Maintenance Detail page in accordance with an exemplary embodiment of the present invention;

FIG. 19 is a process flow diagram of a "Quick Dates" process in accordance with an exemplary embodiment of the present invention;

20 FIG. 20 is a diagram of a an embodiment of a computer suitable for use as a host for a court calender generation server in accordance with an exemplary embodiment of the present invention;

FIG. 21 is a process flow diagram of an add event process in accordance with an exemplary embodiment of the present invention;

25 FIG. 22 is an event maintenance process in accordance with an exemplary embodiment of the present invention;

FIG. 23 is an event maintenance process as used by an event maintenance module in accordance with an exemplary embodiment of the present invention;

30 FIG. 24 is a block diagram of a change notification module in accordance with an exemplary embodiment of the present invention;

FIG. 25 is a change notification process in accordance with an exemplary embodiment of the present invention;

FIG. 26 is a reminder notification process in accordance with an exemplary embodiment of the present invention;

35 FIG. 27 is a process flow diagram of a jurisdiction and event expert generation process in accordance with an exemplary embodiment of the present invention; and

1 APPENDIX A is a pseudocode listing for software components of a court date server in accordance with an exemplary embodiment of the present invention.

DETAILED DESCRIPTION

5 FIG. 1 is a diagram of an application service provider embodiment of a court date server in accordance with an exemplary embodiment of the present invention. A court date server 100 includes a Web site 101 having a plurality of Web pages for accessing features of the court date server via a communications link. The court date server includes a date calculation engine 102 for generation of a court calendar using court scheduling rules and a starting event date. The
10 court date server includes a court rules database 104 for storage of court scheduling rules specific to each jurisdiction served by the court date server. The court rule database stores sets of court rules having date formulas used to schedule court deadlines and scheduling dates. All the data needed to schedule court related deadlines is contained in the court rule database.

A "Rule Set" includes the formulas used to calculate court dates for a specific court
15 jurisdiction. A "Formula" includes a date calculation script that calculates a court deadline. A "Trigger" formula causes the scheduling of a set of court dates. The "Trigger" formula is what a user selects when scheduling dates using the court rule database. For example, when scheduling a Trial date the user selects the "Date of Trial" trigger formula and then enters its due date. A "Trigger" formula that bases its date calculation on other "Trigger" formulas is referred
20 to as a "Branching Trigger".

A "Branching Trigger" can be scheduled like a regular "Trigger" (by selecting it and providing a date) or is scheduled automatically when one of the "Trigger" dates used by its formula calculation are scheduled. A "Trigger" formula cannot base its date calculation on a "Related" formula. Also, a "Trigger" formula does not have to have a date calculation script.
25 The user provides the due date for triggers that do not contain a calculation script (at the time the trigger is scheduled). A "Related" formula is used when one of the trigger dates on which its calculation is based is scheduled. "Related" formulas can also base their calculation on other "Related" formulas. "Related" formulas that base their calculation on other related formulas cannot reference each other within the relationship. This prevents a "circular" relationship from
30 occurring. For example, formula A bases its calculation on formula B which bases its calculation on formula A. In this case a circular relationship is created which would place the calculation engine into an infinite loop since neither formula A or B can successfully calculate their dates.

A "Group" is an interrelated set of dates. All court dates within a group have some
35 relationship to at least one other date in the group. Groups allow us to maintain the integrity of interrelated dates. When a formula is added or changed, the formula's script is examined for

1 formula relationships and entries are made in the "Formula Relationship Table" so that the program can quickly retrieve the formulas that are used when a particular trigger date is scheduled. The data in this table is also used when displaying formulas to the user in a hierarchical folder format.

5 A user database 106 is included in the court date server for tracking the usage of the court date server by a plurality of users. In addition, the court date server stores generated court calendars in the user database for later access by a user. The court date server is hosted by a court date server host 108.

10 The court date server is accessed via a communications network, such as the Internet 110, by a user using a user client 112. In operation, the user accesses the court date server using Web pages or documents retrieved from the court date server's Web site. The user supplies matter data, trigger event data, and court identification 114 to the court date server via the communications network. The court date server's date calculation engine uses the matter data, trigger event data, and court identification to generate a court calendar 116 for transmission to
15 the user via the communications network. The date calculation engine generates the court calendar by selecting a court's scheduling rules from the rules database using the court identification and the matter data. The date calculation engine then uses the trigger event data to calculate court dates moving forward from the trigger event's date.

20 FIG. 2 is a Web site diagram of a court date server in accordance with an exemplary embodiment of the present invention. The Web site 101 includes a "Home" page 200 having links to sub-pages of the Web site. Users log in with a valid user id and password before any Web site sub-pages can be accessed. General data is placed on the Home page such as news flashes, product update data and an ad banner. The Home page further includes a link to a "Registration" page 202. From the Registration page, users can select an "Individual" registration
25 page 204 or a "Corporate" registration page 206 for creation of individual or corporate accounts. An individual account allows a user to setup an account for their sole use. All date generation charges are billed to this user's account. A corporate account allows a user to setup an account that can be used for any number of users at a firm. Date generation charges for all users at the firm are billed to the corporate account. The administrator of the account (the user that created
30 the corporate account) controls who at the firm can access the Web site.

The registration process begins when the user selects either the individual or corporate account type from the Registration page. User registration is a multi-page process that is completed before the user submits registration data. No two users can have the same "E-mail Address". An error message is returned if one user has the same e-mail address as another user.
35 The user data collected during the registration process includes the user's first and last name, a date of birth for verifying user identity by a password recovery mechanism, and an E-mail

1 address which also serves as the user's login name. The user then selects a password and a password question and response which are used if the user has forgotten their password. The user is then asked for company data including the user's firm's name and address and a contact telephone number.

5 Usage and billing reports are normally sent to the user using the data provided by the user. If the user would like this data to go to a different location, the user may provide additional billing data if their billing data is different than the previously supplied data. In addition, a user may set up a corporate account with one of several billing types. Possible billing types are "Bill my credit card" and "Monthly statement". If the user is creating an individual account then a user's credit card is automatically billed.

10 FIG. 3 is a calendar date options page as used by an exemplary embodiment of the present invention. A calendar date options page 300 includes settings that apply to the calendar dates added by the user. A "Notify me when dates are changed?" setting 302 tells the court date server whether or not the user wishes to be notified when a court date is changed because of a change to the scheduling rules. A "Send me e-mail reminders of upcoming dates?" setting 304 tells the court date server whether or not the user wants to receive e-mail reminder notices of upcoming calendar dates.

15 Referring again to FIG. 2, a "Welcome/Error" page 208 is generated and transmitted to the user. If an error occurs during the registration process (i.e. required data not provided, duplicate login name or password) then an error page is generated containing data about the error and how to resolve it. Otherwise, a welcoming message is displayed.

20 The Web site includes a "Secure Login" page 210 that is displayed after a user selects a "Login" link located on the Home page. The user enters their e-mail address and password in the fields provided and presses the "Login" button to log into the Web site. Selecting a "Cancel" button returns the user to the Home page. Selecting a "Forgot your password?" link displays a "Forgot your password" page 212 which is used to query the user using the previously described password question. A "Password Recovery" page 214 is displayed after the user enters their e-mail address for the account and their date of birth. This data is verified when a "Submit" button is pressed. If the data is incorrect then an appropriate error page is generated. A "Password Recovery" page 214 is displayed after the password verification data provided on the "Forgot your password?" page has been validated against account data for the user. This page is used to get the answer to the "password recovery question". The "password recovery question" is specified by the user when setting up an account. Selecting a "Submit" button sends the answer back to our server for validation. If the answer is incorrect, an appropriate error message is displayed. If the answer is correct, an e-mail is sent to the user containing the user's password. After successfully logging in, the user is allowed to access the features of the court date server.

1 A court date server main page 218 includes links to the Web site's sub-pages. Calendar
generator functions are accessed from this page using links to the following pages. A "Refer a
Colleague" page 220 allows users to refer a colleague to the Web site by sending an e-mail 222
to selected colleagues. The user can enter up to 5 e-mail addresses of colleagues and attach a
5 personal message to each e-mail. A referral manager process (not shown) is responsible for
sending the referral e-mails. The referral manager periodically checks a referrals database for
new entries and creates and sends an appropriate e-mail to each new prospect. In one
embodiment of a court date server, if a referral subsequently registers with the Web site and uses
its services, the user that made the referral receives a credit that is applied to date generation
10 charges. Selecting a "Submit" button sends the referral data to the court date server for
processing. Selecting a "Cancel" button returns the user to the main page.

An "Account Information" page 224 allows the user to view and edit their account data.
Billing data can also be viewed from here. The Account Information page allows users to view
and change their account data and password, view a history of transactions and, if it is a corporate
15 account, view and edit a list of account users. For added security, the users credit card number
and expiration date are not displayed on this page. To view or change the account's credit card
data the user clicks a "Change" link for a "Payment Information" section.

A "Corporate User List" page 226 includes a list of users for a corporate account. The list
is in order by the user's last name. Selecting a letter from a ComboBox displays all users whose
20 last name begins with the selected letter. New users are added by selecting on an "Add" button.
This displays a "Corporate User" entry form used to enter a new corporate user. Selecting an
"Edit" link next to a users name allows the data for that user to be edited. Selecting a "Delete"
link deletes the user from the list. A "De-activate" link is used to de-activate a user. When
clicked, the user is deactivated and the link changes to "Activate".

25 A "Corporate User Account Information" page 228 is displayed when the "Edit" or "Add"
links are selected from the "Corporate Account User List" page and allows the user to enter data
about a corporate account user. Corporate account users are allowed to change their data once
they have been setup by an account administrator. Date calculation charges are billed to the
primary corporate account set up by an administrator when a corporate account user generates
30 court dates. Selecting a "Submit" link validates the data and stores it in a "UserAccounts" table.

A "Change Password" page 230 allows the user to change their password. The user enters
their existing password for verification purposes. An "Enter your new password" and a "Re-enter
your new password" fields are compared and an error message displayed if they are not the same.
Selecting a "Submit" button sends the password data to the court date server for validation and
35 processing. If the existing password data provided by the user is incorrect an error message is
returned. If the existing password data is verified then the user's password is changed.

1 A "Transaction Filter" page 232 allows a user to enter search criteria used to locate specific transactions with the court date server. The user enters filter criteria in the fields provided and clicks a "Find" link. If transaction records are found, a "Transaction History" page 234 is displayed containing an entry for each transaction. The fields in the Transaction Filter page
5 include: a transaction ID to allow finding a transaction using its unique ID; a date range for searching for transactions that occurred in a specified date range; an amount range for searching for transactions in a specified billing amount range; a corporate user field for an administrator of a corporate account to search for transactions by a specific corporate user; and a "Show 'n' Transactions" field allowing the user to set how many transactions to display per page on a
10 transaction history list. In a Transaction Filter page in accordance with an exemplary embodiment of the present invention, entering a specific transaction record ID disables the other filter fields on the page.

In another Transaction Filter page in accordance with an exemplary embodiment of the present invention, any of the filter options allowing for a range, such as the amount field, allow
15 "open ended" ranges to be entered. If one end of a range is not provided, it means to include all records from that side of the range. In another Transaction Filter page in accordance with an exemplary embodiment of the present invention, if no filter is provided then all transactions are returned for the user.

The Transaction History page includes transaction history data retrieved from a "Transaction
20 Log" table stored in the user database based on the Transaction Filter options. The filter options are displayed in a descriptive paragraph in the "Filter Used" section of the Transaction History page. Selecting a "Change" link returns the user to the "Transaction Filter" page allowing the user to make changes in the transaction filter. Each line item displayed in a "Transaction" section of the Transaction History page has the date and time of the transaction, the amount billed, the
25 number of dates generated, the user that generated the dates if this is a corporate account, and a transaction ID. The number of transactions displayed on the Transaction History page depends on the "Show 'n' Transactions" field setting. Page links are displayed in a Transaction History page heading and are in the format "<<Prev 1 2 3 ... Next>>". The "..." is used to indicate more pages than will fit in the space provided on the page. Selecting a "<<Prev" or "Next>>" link
30 displays the previous or next page of transactions. The page links are not shown if the Transaction History page has only one page of transactions. selecting an "Account Info" button returns the user to the main Account Information page.

A "Contact Technical Support" page 236 allows a user to open an incident report with an administrator of the court date server by sending an error report e-mail message 238. A
35 "Synchronize PIM" page 240 allows a user to download matter and event data to a personal organizer such as a Personal Digital Assistant (PDA) or other specialized computing device.

1 A "Matter Management" page 242 allows a user to enter filter criteria to locate a matter or matters they are interested in. Access to the data about a matter, as well as the events associated with a matter, is accessed from the resultant matter list.

5 FIG. 4 is a Matter Management page as used by an exemplary embodiment of the present invention. The user has the option of finding matters based on all or part of the matter name (400), using matter type field 402, a date opened field 404, or a date closed field 406. Inactive matters can also be optionally included in the search by selecting an inactive case field 408. A matter name search field 400 allows the user to enter all or part of the matter name they are looking for. Using radio button selections, 410, 412, and 414, beneath the matter name text field, 10 users can search for an exact match, matter names that begin with the specified text, or matter names that contain the specified text.

Any of the filter options that allow for a range allow "open ended" ranges to be entered. If one end of a range is not provided, it means to include all records from that side of the range. 15 If no filter is provided then all matters are returned by the query.

A "How Many Matters" field 416 allows the user to specify how many matters to display in a matter list. Selecting an "Add a New Matter" link 418 allows the user to add a new matter. Selecting a "Matter Recover" button 420 displays the "Matter Recovery" list which allows users to recover deleted matters and their associated dates.

20 Referring again to FIG. 2, after a user fills out the Matter Management page and submits it to the court date server, the court date server generates a "Matter List" page 242 by building a database query from the filter settings in the Matter Management page and querying the user database for matters satisfying the filter criteria.

FIG. 5 is a Matter List page in accordance with an exemplary embodiment of the present invention. A Matter List page 244 includes a display of the filter criteria 500 and a list 502 of matters that match the filter criteria entered on the "Matter Management" page. Each matter listed includes the name of the matter 504, the date the matter was opened 506, an "Edit" selection 508, a "Delete" selection 510, and an "Events" selection 512 button next to it. Inactive matters 514 are displayed in a different color than the active matters. Selecting either an "Add 25 a New Matter" button 516 or an "Add a Matter" link 518 allows the user to add a new matter.

30 Selecting the Delete button next to a matter deletes the matter and all its associated records (transaction log records, events, etc.) from the court date server's user database. When the "Delete" button is pressed a "Matter Deletion" verification page 246 (FIG. 2) is displayed. Selecting the Edit button allows the user to edit the matter. Pressing the Events button displays 35 the events for the matter.

Selecting a "Back" button 520 returns the user to the "Matter Management" page 242 (FIG.

1 2). Selecting the "Home" button 522 returns the user to the main page 218 (FIG. 2).

FIG. 6 is a Matter Information page as used in an exemplary embodiment of the present invention. A Matter Information page 600 allows a user to add and edit matter data. A matter name field 602 is used to enter a matter name. Matter names are unique for each user. In other words, a user can not have two matters with the same name.

5 A matter type field 604 is used to enter a matter type. The user selects an existing matter type from a list or may enter a new one. A docket ID field 606 is used to enter a user defined docket ID for the matter.

10 A date opened field 608 is for display of the date the matter was opened. For a new matter, this field is set to the current date. A date closed field 610 is for display of a date on which a matter was closed.

A jurisdiction field 612 displays a default jurisdiction for a matter. This field is set by using a "List" link 614 and selecting from a to-be-described Jurisdiction Expert process. The Jurisdiction Expert includes a hierarchical list of valid jurisdictions for a matter.

15 An inactive field 616 allows a user to set the status of a matter to inactive. The matter will not appear on any lists or reports unless the user requests inactive matters.

A matter ID 618 is shown and an "Events" button 620 is available when editing an existing matter. Selecting the Events button displays an "Event List" page 250 (FIG. 2) for a matter.

20 Selecting a "Delete" button 622 deletes a matter and all of its associated records (transaction log records, events, etc.) When the "Delete" button is pressed the Matter Deletion verification page 248 (FIG. 2) is displayed.

Selecting a "Submit" button 624 sends the matter data to the court date server for processing and storage in the user database. If an error occurs after submitting the data to the database, an error page is displayed containing data about the error and possible solutions.

25 Referring again to FIG. 2, a "Matter Recovery" page 252 is available to the user to recover a matter that the user has inadvertently deleted. This page includes a list of deleted matters.

FIG. 7 is a Matter Recovery page in accordance with an exemplary embodiment of the present invention. A Matter Recovery page 252 includes a list 700 of deleted matters. To recover a deleted matter, the user clicks a "Recover" link 702 next to a matter in the list. After recovering a deleted matter, the matter and all its associated dates are available for the user to access.

Referring again to FIG. 2, an "Event Management" page 254 includes filter fields that allow a user to search the user database for events. A user may also add a new event from this page.

35 FIG. 8 is an Event Management page in accordance with an exemplary embodiment of the present invention. An Event Management page 254 allows multiple filter options to be entered by a user in order to find an event. A matter name field 800 allows a user to search for a specific

1 matter name or part of a matter name. A search options pull down menu 802 allows a user to set
search options including "Exact" for exactly matching a matter name, "Beginning with" for
matching to any matter beginning with an entered matter name, and "Includes" for matching to
any matter whose name includes an entered matter name. A matter type field 804 allows a user
5 to find events based on the matter type assigned to each matter for which events have been
scheduled.

A due date field 806 allows a user to search for events within a specified due date range. A
time field 808 allows a user to search for events based on an event time. An added on field 810
allows a user to search for events based on the date they were added to the system. A last
10 changed field 812 allows a user to search for events based on when they were last changed. Any
of the filter options that allow for a range also allow "open ended" ranges to be entered. If one
end of a range is not provided, it means to include all records from that side of the range.

A unique ID field 814 allows a user to search for a specific event using an event's specific
ID. A formula field 816 allows a user to search for events that use a specific formula for their
15 calculation. This field includes a "Rule set" field and a "Formula ID" field separated by a
hyphen.

A formula description field 818 allows a user to search for events based on the contents of
a formula description. A pull-down menu 820 allows a user to search for all or part of a formula
description. Search options include "Exact", "Beginning with" and "Includes" as previously
20 described.

A note field 822 allows a user to search for events based on the contents of the note field.
A pull-down menu 824 allows a user to search for all or part of a note. Search options include
"Exact", "Beginning with" and "Includes" as previously described.

An "Include Completed Events" button 826 allows a user to include completed events in the
25 event search. An "Include Deleted Events" button 828 allows a user to include deleted events
in the event search. A "How Many Events" field 830 allows a user to set the number of event
records to display per page on a resultant event list.

With the exception of the "Include completed events" and "Include deleted events" settings,
the user provides data for at least one of the other fields on this page. Selecting a "Find" button
30 832 submits the search request to the court date server for processing.

Referring again to FIG. 2, the court date server receives the filter settings from the Events
Management page 254 and generates the Event List page 250 included a list of events satisfying
the filtering criteria.

FIG. 9 is an Event List page in accordance with an exemplary embodiment of the present
35 invention. An Event List page 250 includes an event list 900 showing the events that meet the
filter criteria provided from the Events Management page. The event list includes the following

1 data for each listed event. A due field 902 has the event due date and the word "Completed" if
the event has been marked completed. If the event is marked completed, a "Complete" link 904
is changed to "Un-complete". A "Time" field 906 has the start and end time of the event. If the
event only has a start time then only that time is displayed. If the event has no time then nothing
5 is displayed in this field. A "Matter/Authority/Description" field 908 includes the matter name,
a formula authority (the source of the deadline), first 2 lines of a formula's description and first
2 lines of a user provided note. If the formula description or note data needs to be truncated to
fit within the 2 line limit then a "..." is placed at the end of the text to indicate that more text is
present.

10 The listing for each event includes links allowing the user to edit/view, Delete and
Complete/Uncomplete an event. Selecting an "Edit/View" link 910 displays an "Event Detail"
page 256 (FIG. 2) having data about an event. Selecting a "Delete" link 912 marks the event as
deleted and removes it from the list. Selecting a "Complete" link 904 marks the event as
completed and places the word "Complete" under the due date in the due field and changes the
15 "Complete" link text to "Un-complete". Selecting "Un-complete" removes the word "Complete"
from the due field and changes the link text back to "Complete".

Selecting a "Home" button 916 returns the user to the main page 218 (FIG. 2). Selecting a
"Filter" button 918 returns the user to the Event Management page so they can change the filter
options. A "Print" button 920 allows the user to print the list of events and an "Export" button
20 922 allows the user to export the events to a delimited ASCII file.

Referring again to FIG. 2, a "Print Events" 258 page is displayed when the "Export" button
is selected from the Event List page 250. The Print Events page allows the user to specify a file
name and location as well as other delimiter options. Selecting an "Export" button exports a
current event list to the specified file. Selecting a "Back" button returns user to the Event List
25 page. An "Example" label included in the Print Events page changes depending on the delimiter
options selected.

FIG. 10 is an add event page used to add an event in accordance with an exemplary
embodiment of the present invention. An add event page 1000 is displayed when an "Add a New
Event" link is selected from one of the previously described pages. The add event page steps the
30 user through a process of scheduling court dates using the scheduling rules database. As each
step is completed, subsequent steps are enabled. The user performs each step in sequence.

A matter for which event dates will be generated is entered using a "List" link 1002 to display
the previously described Matter Management page allowing the user to locate a specific matter.
The user may bypass the Matter Management page by entering search criteria in a matter field
35 1004 then selecting the "List" link. For example, if the user wants to find all matters beginning
with the word "Acme" they would enter "Acme*" into the field and select the "List" link. New

1 matters can be added from either the Matter Management or Matter List pages as previously described.

Once a matter is selected, the user selects a jurisdiction. The jurisdiction is set by using a to-be-described Jurisdiction Selection Expert accessed through link 1006. Once selected, the
5 jurisdiction is displayed in the jurisdiction field 1008.

Once the jurisdiction has been selected, the user can select an appropriate court event from a to-be-described Event Selection Expert accessed using link 1010. Once selected, the event is displayed in an event field 1012.

Once an event has been selected, the user provides a date in a date field 1014. An entry in
10 a time field 1016 is optional. Both these fields are set by selecting data from appropriate selection dialogs reached by links 1018 and 1020.

A reminder field 1022 allows a user to schedule a reminder e-mail to be sent to the user for an event. Setting an "Apply to all scheduled dates?" option 1024 applies the reminder offset entered in the reminder field to all subsequently scheduled dates (for example 1 day before each
15 event).

A note field 1026 allows a user to enter a note that will be attached to an event trigger date. Setting an "Apply to all scheduled dates?" option 1028 applies a note to all subsequently scheduled event dates. The user selects a "Schedule" button 1030 to schedule the dates or selects a "Cancel" button 1032 to return to a previous page.

FIG. 21 is a process flow diagram of an add event process in accordance with an exemplary embodiment of the present invention. An add event process 2100 adds an event date for a user. A caller process 2101 gets (2102) event data from the user and transmits the event data to the court date server. The court date server validates (2104) the event data is valid. If the event data cannot be validated, the court date server generates (2106) an error document and transmits the
25 error document back to the caller process.

If the event data is valid, the court date server gets (2108) a group to which the event belongs in order to determine the new event's trigger date. The court date server calls (2110) the date calculation engine to generate new dates for the event. The court date server uses the new dates to generate a date calculation result document 2112, such as a Web page, including data on the
30 number of dates generated and the calculated amount to be debited from the user's account or charged to a user's credit card account. The calculation result document is transmitted to the user so that the user can accept or reject a debit or charge of the calculated amount. If the user does not accept (2114) the debit or charge, the add event process terminates and no debits or charges are made the user's accounts and no dates are stored or updated in the user database.

35 If the user does accept the debit or charge, the court date server charges (2116) the user's charge card or debits the user's account. If the debit or charge is not successful, the court date

1 server generates (2118) an error page for transmission back to the user. If the debit or charge is
 successful, the court date server verifies (2120) the event dates and stores (2122) the dates in the
 user database. If the store process is not successful, the court date server credits (2124) the user's
 5 account or credit card account and generates (2126) an error document for transmission back to
 the user. If the court date server successfully stores the event date data into the user database,
 the court date server inserts (2128) a transaction record into a transaction database and generates
 a date list document (2130) using the event data and the new dates for transmission back to the
 user. Control then returns to the caller process.

FIG. 11 is an event edit page in accordance with an exemplary embodiment of the present
 10 invention. An event edit page 1100 allows the user to view and edit event data. The page is
 initially displayed in "View" mode. That is, none of the event data can be altered. To change
 an event, the user selects a "Change" button 1102. Selecting the "Change" button enables the
 data entry fields and changes the "Change" button text to "Submit".

Only "Due date" 1104, "Time" 1106, "Reminder" 1108, "Note" 1110, "Complete" 1112, and
 15 "Don't change" 1114 fields on the event can be changed. The "Due date" and "Time" fields are
 set by using the associated selection dialogs accessed by links 1116 and 1118, "Calendar" and
 "Time" links respectively. The "Reminder" field is set using a reminder spinner button 1120 next
 to the "Reminder" field. The user can type anything they want into a "Note" field 1122. In
 operation, a user modifies the due date for the event and selects the Submit button to update the
 20 data stored by the court date server in the user database.

FIG. 12 is a screen capture of a Jurisdiction Selection Expert in accordance with an
 exemplary embodiment of the present invention. A Jurisdiction Selection Expert (JSE) 1200
 allows users to select rule sets used to schedule dates for any jurisdiction from a hierarchal list
 of jurisdictions. The JSE includes a hierarchical list 1202 of rule sets used by a court date server.
 25 The user selects category topics, such as category 1204, to expand the sub-categories beneath,
 such as subcategory 1206. Selecting on a sub-category either displays more categories or a
 selectable jurisdiction item 1207.

In one court rule database in accordance with an exemplary embodiment of the present
 invention, court rules are encoded as formulas including data used to generate a JSE hierarchical
 30 folder tree. For example, where "f" means a closed folder, and "fo" means an open folder:

```
f  Los Angeles Superior Court
fo Orange County Superior Court
  f  $DC  Last court day to complete non-expert discovery...
  fo $MO  Date set for motion to be heard.
    -3cn Last court day to request continuance hearing...
    -5db Last court day to file and serve replay papers...
```

1 -10db Last court day to file and serve opposition to motion...
 fo \$TR Date of trial.
 -2cb Last court day before trial for either party to serve...
 -70df Last court day to demand the exchange of expert...
 5 \$TS 10df (sec/rel)
 f San Diego County Superior Court

The relationship data for this tree view is retrieved from a to-be-described formula relationship table.

10 In one court rule database in accordance with an exemplary embodiment of the present invention, the format for JSE data providing hierarchical text data for a court is as follows:

`<tree hierarchy text>||<tree hierarch text>...||[!USAGE! | !NOTE!]<rule set1>;<rule set 2>[!MORE!]...`

15 The "<tree hierarchy text>" entries tell the court date server where in the tree hierarchy to place an entry for the rule set. Each tree hierarchy text entry is separated by "||". The rule set usage data (that is the actual rule set selection data) is located after a "[!USAGE!]" tag. If this is a note entry then the note text follows a "[!NOTE!]" tag. Each rule set in the usage section is separated by a semi-colon (;). A "[!MORE!]" tag is used when an entry needs to be made in the JSE selection tree in more than one location.

The following example shows JSE data for the CA:LA-FT rule set:

25 List by State||California||State||Trial Courts||Southern California||Los Angeles County||Civil Litigation||Unlimited Jurisdiction Case||Case assigned to Independent Calendar Judge||[!USAGE!]CA:LA-FT;CA:DISC

The next example shows how to add a note to a JSE branch. The note entries appear immediately beneath the specified branch:

30 List by State||California||State||Trial Courts||[!NOTE!]Local civil litigation rules include relevant provisions of CCP, CRC and California Code. Limited Jurisdiction cases have value of \$25,0000 or less, see CCP Sec. 85.

35 The next example shows the JSE data for the CA:APPRULE rule set (shows how to use the "[!MORE!]" tag):

1 List by State||California||State||Appellate||Sixth Appellate District - Sixth Appellate has no
 local rule deadlines. CA:APPRULE will be selected.||[!USAGE!]CA:APPRULE[!MORE!]
 List by State||California||State||Appellate||Supreme Court||[!USAGE!]CA:APPRULE

5 In the above example, the "CA:APPRULE" rule set is located under the "Sixth Appellate
 District" and "Supreme Court" branches of the JSE selection tree.

 In one court date server in accordance with an exemplary embodiment of the present
 invention, the data displayed by the JSE is contained in a text file. The text file is created and
 maintained by an administrator of a court date server. If jurisdictions are added, changed, or
 removed, a new file is created and copied to the court date server Web site. In another court date
 server in accordance with an exemplary embodiment of the present invention, the court rule
 database includes jurisdiction hierarchy data linked to a rule set record. The data used to build
 the JSE is retrieved from each rule set.

 In the illustrated example, a "Limited Jurisdiction Case" child 1206 has been expanded to
 show the actual Jurisdiction (rule set) code 1207 used to schedule dates for that venue. In
 another court date server in accordance with an exemplary embodiment of the present invention,
 the JSE does not expose this final child node. When the user selects a jurisdiction, such as the
 "Limited Jurisdiction Case" child node, the JSE returns the complete hierarchical path. In the
 example shown, "List by State->California->State->Trial Courts->Southern California->Los
 Angeles County->Civil Litigation->Limited Jurisdiction Case" is returned as well as an actual
 jurisdiction code, for example "CA:LAMU-FT", that is passed to a date calculation engine for
 event date generation. If more than one jurisdiction code is present for a selected jurisdiction
 then a comma separated list of jurisdiction codes is returned (for example
 "CA:LA-FT,CA:DISC").

 FIG. 13 is a screen capture of an Event Selection Expert in accordance with an exemplary
 embodiment of the present invention. An Event Selection Expert (ESE) 1300 is used by a user
 to select an event type for an event. In the illustrated example, a "Trial Date" node 1302 has been
 selected exposing actual event code "\$TR" 1304 that is passed into a to-be-described date
 calculation engine for date generation. In another court date server in accordance with an
 exemplary embodiment of the present invention, the actual code is not shown. In the illustrated
 example shown, when the user selects the Trial Date node, the ESE returns the node description
 "Trial Date" and the actual event code of "\$TR" 1304. The data used by the ESE is compiled
 from the data tables included in the court rule database.

 A trigger formula is court rule formula that is used as a formula for a calculating event dates
 for a trigger event. A trigger event is an event that is linked to other events. When the trigger
 event date is calculated by the court date server using the trigger events trigger formula, then

other dates for other events linked to the trigger event are calculated as well. Table A includes database entries for a trigger formula including data used to generate an ESE by the court date server:

Field	Explanation
Key Code	The key code for the trigger date.
Category	Category code attached to this formula.
Priority	Priority code attached to the formula.
Authority	The formulas authority text.
Formula	Contains the formula script.
Description	The event description.
Expert Data	Event Selection Expert data. See below for a full description.

Each trigger formula includes ESE data used to place the trigger in the ESE selection tree. The format for the ESE data is:

```
<tree hierarchy text>||<tree hierarchy text>...||[!KEYCODE! | !NOTE!]<key
code>[!MORE!]...
```

The “<tree hierarch text>” entries include a location of the entry in the ESE selection tree. Key code data (that is the key code selection data) is located after the “[!KEYCODE!]” tag. The “[!MORE!]” tag is used if ESE data for a trigger formula needs to be in more than one location in the ESE selection tree. Here is an example of an ESE data string for a “Date of Trial” trigger formula:

```
Trial||Trial Date||[!KEYCODE!]&STR
```

A note may appear beneath a branch in the selection list as shown below:

```
Trial||Trial Date||[!NOTE!]This is a note that appears just beneath the “Trial Date”
branch.[!MORE!] Trial||Trial Date||[!KEYCODE!]&STR
```

In the above example, a note is added to the “Trial” branch.

FIG. 27 is a process flow diagram of a jurisdiction and event expert generation process in accordance with an exemplary embodiment of the present invention. A jurisdiction and event

1 expert generation process 2700 uses a court rule database 104 including date calculation formulas
2706 having JSE data associated with the formulas as previously described to generate a JSE
document 1200. The jurisdiction and event expert generation process transmits the JSE
5 document to the user and receives 2710 a jurisdiction selection from the user selected using the
JSE. The jurisdiction and event expert generation process generates an ESE 1300 using the
selected jurisdiction and ESE data 2714 associated with the formulas in the court rule database.
The ESE document is transmitted to the user and the jurisdiction and event expert generation
process receives 2708 an event selection from the user selected using the ESE.

Referring again to FIG. 2, the court date server Web site includes an "Event Generation
10 Charges" page 260. The Event Generation Charges page is used to confirm a user's request to
have event dates calculated by the court date server.

FIG. 14 is an event generation charges page in accordance with an exemplary embodiment
of the present invention. When new dates are added, the user is prompted to accept event date
generation charges using an Event Generation Charges page 260. The Event Generation Charges
15 page displays a number of events added 1400 to the user database along with an amount 1402
that is charged to the user's credit card. The amount billed includes the amount for generating
the event dates and may include an event date storage charge. Selecting an "Accept" button 1404
transmits the user's acceptance of the charges to the user's account by the court date server and
finalizes scheduling of the event dates. Selecting a "Cancel" button 1406 cancels the date
20 generation process.

Users are charged based on the number of additions and/or changes made to an event group
for the billing type assigned to the rule set used to generate event dates. A charges matrix table
maintained by an administrator of a court date server determines the amount to charge for date
calculations based on the number of addition and/or changes to a group. A rule set type table is
25 used to retrieve the billing type data of a rule set. Once the charge has been calculated, any user
discounts and credits are applied. New dates and changes made by an event maintenance process
initiated by the administrator of a court date server are not charged to the user.

FIG. 22 is an event maintenance process in accordance with an exemplary embodiment of
the present invention. An event maintenance process 2200 is initiated by an administrator to
30 maintain and update the court rule database. As the court rule database is updated, an event date
previously calculated for a matter may need to be updated if the court rules for calculating the
event date have been changed. To initiate the event maintenance process, the administrator
makes (2202) formula changes that are stored in a formula changes table (2206) and in the court
rules stored in the court rules database. An event maintenance module 2208 is responsible for
35 processing event groups affected by changes to the court rule formulas. The event maintenance
module periodically polls the formula changes table looking for finalized changes or formula

1 changes that have been approved by the administrator. If changes are found, all event groups
affected by the changes are examined and event dates (2210) belonging to the affected event
groups are altered if needed. The changes in the events are stored in an event maintenance log
table (2212) with specific details about the changed events stored in an event maintenance change
5 detail table (2214). A change notification module (2216) periodically polls the event
maintenance log table looking for new log entries and uses that data along with the change detail
data in the event maintenance change detail log to send notification e-mails 2218 to users
regarding the changes made to the users events.

FIG. 23 is an event maintenance process as used by an event maintenance module in
10 accordance with an exemplary embodiment of the present invention. An event maintenance
process 2300 is the method used by an event maintenance Module to apply formula changes to
events. The event maintenance process begins by getting (2302) event groups 2304 for each user
that will be affected by changes made to formulas. The data for each group includes a user ID
and a group ID of each group affected. The record set is ordered by user ID and group ID so that
15 the groups for each user can be processed as a unit.

For each user (2306) the event maintenance process examines the events in the groups for
additions, changes and deletions. Before processing the groups for a particular user ID, an entry
is made (2308) in an event maintenance log table 2212 for the user. The data in this entry is used
later by a change notification module to notify the user of date changes. After the log entry is
20 made, the events in each group (2312) are examined and altered according to the formula
changes. The event maintenance process gets (2314) the events 2316 for a group from the user
database and alters (2318) the event dates based on the formula changes and updates (2320) the
event dates in the user database. Each change made to an event in the group is recorded in an
event maintenance detail table 2214.

25 After all groups (2324) for a user have been processed, the event maintenance log entry made
earlier is "finalized" (2326) (the AllGroupsProcessed field is set) making it available to the
change notification module (see the Change Notification Module topic below for details). After
finalizing the previous user's changes, the groups for the next user (2328) are processed.

FIG. 24 is a block diagram of a change notification module in accordance with an exemplary
30 embodiment of the present invention. Periodically, a change notification module 2216 checks
an event maintenance log table 2212 for changes made to user events. For each user with a
modified event, the change notification module uses the event maintenance change detail table
2214 to generate and send an e-mail 2402 to each user notifying them of the changes made to the
user's events. The notification e-mail contains a "response" link 2403 that when selected sends
35 a confirmation message 2404 to the court date server that indicates the user has received the
notification e-mail.

1 A change notification response handler 2405 processes the confirmation message and updates
the log record associated with the change notification e-mail sent to the user. The change
notification response handler builds a response page 2406 that is returned to the user verifying
that the confirmation of receipt was successful. If an error occurs during the update process, an
5 error page is generated and sent to the user instead. An administrator periodically checks the
event maintenance log table for log records whose notification e-mails have never been
responded to and sends the corresponding users a letter that requests a written verification and/or
the users' new e-mail address.

10 In one embodiment of a change notification module in accordance with an exemplary
embodiment of the present invention, only a certain number of notification e-mails are sent for
each log record. An administrator of a court date server periodically checks for all log records
whose confirmation e-mails have never been responded to and send these users a notice via
regular mail requesting written confirmation or the users new e-mail address. Also, each time
a user logs into the court date Web site, the user receives a display with data about any e-mail
15 notices that have not been responded to. The user is able to confirm receipt of the change
notification at this time.

FIG. 25 is a change notification process in accordance with an exemplary embodiment of the
present invention. A change notification process 2500 polls (2502) an event maintenance log
table 2212 to see if any event changes need to be processed. An event maintenance log entry
20 2503 includes "Confirmed", "NeverConfirmed", "AllGroupsProcessed", "NotifiedOn", and
"TimesNotified" fields holding the status of notification of a user. The criteria used to determine
if a log record needs to be processed is whether or not the "Confirmed" and "NeverConfirmed"
fields are False, the "AllGroupsProcessed" field is True, and the period of time that has elapsed
between the date the last notification was sent, as indicated by the "NotifiedOn", field and the
25 current system date is greater than or equal to a specified notification period or a notification has
never been sent for this log record.

If the change notification process determines (2504) that there are event date changes that a
user needs to be notified about, then for each log record found (2506), the change notification
process generates (2508) a change notification e-mail 2414 (of FIG. 24) for the user using the
30 details of the changes associated with a log record in an event maintenance detail table 2214.
The change notification e-mail includes the number of times the user has been notified and the
last notification date. If this is the last notification, the change notification e-mail contains an
appropriate message warning the user that no further notifications will be sent for this log record.
The change notification process updates (2510) log records in the event maintenance log table
35 2212 upon successfully sending the change notification e-mail. The NotifiedOn field is set to
the current system date and the TimesNotified count is incremented. Processing continues

1 (2512) until all log records have been processed. Before completing the process, the change
notification process polls the event maintenance log table to ensure that any log records added
to the event maintenance log table during the notification process are processed. If the change
notification process determines (2516) that no new changes have been made, the change
5 notification process ends 2518. If otherwise, the change notification process processes each
(2506) new change.

FIG. 26 is a reminder notification process in accordance with an exemplary embodiment of
the present invention. A reminder notification process 2600 gathers (2602) all reminders for
events on a specified date. The events returned are in order by user ID and reminder date. While
10 there are reminders to process (2604), for each user (2606) the reminder notification process adds
(2608) a reminder to a reminder notification e-mail message 2614. The reminder notification
process adds all reminders for a single user (2610) to the reminder notification e-mail message
and sends (2612) the reminder notification e-mail to the user. The reminder notification e-mail
includes data about each event date that the user asked to be reminded of. If the reminder
15 notification process determines (2616) that the reminder notification e-mail message is generated
and e-mailed successfully, the reminder notification processes continues to process reminders
while (2622) there are additional reminders for other users. If an error occurs, then an
appropriate message is written (2618) to a reminder notification activity log. Processing
continues in this fashion until all reminder e-mails have been sent.

20 Referring again to FIG. 2, a user is allowed to create aggregates of event dates into a "group".
A group is an interrelated set of event dates. All event dates within a group have some
relationship to at least one other event date in the group. Groups allow maintenance of the
integrity of interrelated event dates. The court date server Web site includes a "Group Select"
page 262 that allows a user to select a group for inclusion of an event.

25 FIG. 15 is a group selection process in accordance with an exemplary embodiment of the
present invention. A group selection process 1500 receives (1502) a matter ID, a rule set ID, and
a key code. The group selection process gets (1504) groups for the matter that use the specified
rule sets from the user database. The group selection process determines (1506) if any groups
were identified. If not, the group selection process creates (1508) a new group for the matter and
30 groups the event dates specified by the key codes. If groups were identified for the matter, the
group selection process finds (1510) groups to which the specified key codes should be added.
The group selection process determines (1512) if any groups were found. If not, the group
selection process creates a new group as previously described. If only a single groups was found
(1514), the group selection process adds (1516) the new event date specified by the key code to
35 the identified group. If more than one group is found, the group selection process builds (1518)
a group selection page (1520) for use by the user to select a group to which the event dates

1 specified by the key codes will be assigned. If group selection process determines (1522) the
 user selected a group, the group selection process adds (1516) the event dates to the selected
 group. If group selection process determines (1524) the user requested a new group to be
 created, group selection process creates (1508) a new group for the event dates. If the user has
 5 not either selected a group or requested a new group, group selection process exits (1526)
 without adding the new event dates to a group.

Referring again to FIG. 2, the court date server Web site includes a "Verify Events" page 262.
 The Verify Events page displays newly added events for a group as well as changes to related
 dates after the user changes a "trigger" date.

10 FIG. 16 is a Verify Events page in accordance with an exemplary embodiment of the present
 invention. A Verify Events page 262 is similar to the previously described Event List page with
 the following exceptions. Additions and changes are indicated in an "A/C" field 1600. The user
 may avoid a change by selecting a "Skip" link 1602. The user may also remove an addition by
 selecting a "Delete" link 1604. The user may also edit a note associated with the event by
 15 selecting a "Note" link 1606.

Selecting an "Accept" button 1608 accepts the additions and changes and returns the user to
 the page from which the addition or change was initiated. Selecting a "Cancel" button 1610
 cancels the changes and selecting a "Print" button 1612 prints the displayed list.

Referring again to FIG. 2, the court date server Web site includes an "Event Maintenance
 20 Log" page 266. An event maintenance process makes changes to users event dates when the
 event dates' controlling formulas are changed. Each item in the list represents one event
 maintenance process. In other words, an event maintenance process was run because of changes
 to the rules and one or more of a user's dates where changed.

FIG. 17 is an Event Maintenance Log page in accordance with an exemplary embodiment of
 25 the present invention. An Event Maintenance Log page 266 includes a changed event date list
 1700 of event dates that were changed by the event maintenance process. The event date list
 includes the following fields. A "Notified On" field 1702 includes a date and time of a last
 change notification sent to the user. A "Notifications" field 1704 includes the number of times
 the user has been notified of date changes before responding to a "Change Notification" e-mail.
 30 A "Log ID" field 1706 include a unique record ID of an event maintenance log entry. A
 "Changes" field 1708 includes a count of the number of events that were changed by the event
 maintenance process. A "Confirmed?" field 1710 includes a "Yes" once the user has responded
 to a "Change Notification" e-mail and a "No" otherwise. Each event maintenance log entry has
 a "Details" button 1712 next to it allowing the user to view changes made to events associated
 35 with an event maintenance log entry.

FIG. 18 is an Event Maintenance Detail page in accordance with an exemplary embodiment

1 of the present invention. An Event Maintenance Detail page 268 displays detailed data for an
event maintenance log entry. An ID 1800 of the event maintenance log record is displayed in a
page description text at the top of the Event Maintenance Detail page. Each event maintenance
log entry includes change data 1802 for one event. An event maintenance log entry change field
5 1804 includes a full description of the change.

FIG. 19 is a process flow diagram of a "Quick Dates" process in accordance with an
exemplary embodiment of the present invention. A Quick Dates process 1900 option allows a
user to generate dates that the user does not wish the court date server to store and track. The
user enters enough data to generate court dates and receives a date list that the user can export
10 to another application or print. The user also receives an e-mail including the dates. A "Quick
Date Entry" page 1902 (also of FIG. 2) is used to gather data about the initial court date from the
user. A user enters a valid jurisdiction by requesting 1904 the previously described Jurisdiction
Expert 1906 to select from a list of valid jurisdictions generated (1908) by the court date server.
The user requests (1910) an event to be scheduled using the previously described Event Selection
15 Expert 1912 to display a list of valid events for the selected jurisdiction. The court date server
generates the list of valid events by checking (1914) the selected jurisdiction and generating
(1916) an event selection list. If the jurisdiction is invalid, the court date server generates (1918)
an Event Selection Expert error page 1920. After providing jurisdiction and event data, the user
enters a date and time of the event using a date and time selection menu. Selecting a "Submit"
20 button transmits the event data to the court date server. If an error occurs, then the web service
generates a descriptive error page and returns it to the user. The court date server generates
(1920) event dates and calculates (1922) the appropriate charges for the generated dates.

The court date server asks (1924) the user if the user will accept the charges using a
previously described event generation charges page. If the user accepts the charges, the court
25 date server generates (1926) a list 1927 of event dates for transmission to the user. The court
date server also generates (1928) and transmits to the user an e-mail (1930) including the
generated event dates. At the end of the process, the court date server records (1931) the
transaction in a transaction table 1934.

Referring again to FIG. 1, a court date server maintains a user database 106 of user data in
30 order to track event dates for users and a schedule rules database 104 for storing scheduling rules
of different courts. The databases include grouped tables allowing each database to reside on
different servers thus reducing the workload of each server. For example, an Event Maintenance
process can be running continually on the server that includes an "Event Maintenance" database
without affecting the performance of a server dedicated to generating and storing court dates.

35 An accounts database includes tables used to store user account data. A master settings file
for the entire court date server web site is also located in this database.

1 Table 1 is a Site Settings Table including settings that apply to the web site and can only be changed by an administrator of the court date server Web site.

Table 1	
Field	Description
MaxCngNotifs	Maximum number of date change notifications that will be sent to a user.
MaxEvListItems	Maximum number of events that can appear on the Event List. NULL = unlimited.
MaxMatters	Maximum number of matters per user. NULL = unlimited.
MaxEvents	Maximum number of events per user. NULL = unlimited.
DisableNotify	Disable the Event Change Notification process?
NotifyTime	Time at which the Event Change Notification process checks for event changes.
NotifyPeriod	Number of workdays that must elapse before another Event Change Notification e-mail is sent to the user.
ReminderTime	Time at which the Reminder Notification process checks for reminders.
ActivityLogLevel	Determines what data is written to an Activity Log table.

1 Table entry "MaxCngNotifsDetermines" is a maximum number of change notification e-mails that will be sent to a user for each Event Maintenance Log record. When this value is reached, the sales department is notified and a letter is sent to the user requesting a written confirmation of the users new e-mail address.

5 Table entry "MaxEvListItems" is a maximum number of events that can appear on an Event List. Unlimited if set to NULL.

Table entry "MaxMatters" is a maximum number of matters allowed per user. Unlimited if set to NULL.

10 Table entry "MaxEvents" is a maximum number of events allowed per user. Unlimited if set to NULL.

Table entry "DisableNotify" disables an Event Change Notification process.

15 Table entry "NotifyTime" includes a time at which an Event Change Notification process begins sending change notification to users.

Table entry "NotifyPeriod" includes a number of days that elapse before subsequent Event Change Notification e-mails are sent for any change notifications that the user has not responded to.

Table entry "ReminderTime" includes the time at which a Reminder Notification process begins sending reminder e-mails.

25 Table entry "ActivityLogLevel" determines an amount of detail contained in all activity log tables. 0 (the default) writes just basic system data and errors to a log. Increasing this value increases the amount of detail contained in each log.

30 Table 2 is a Charges Matrix Table as used in an exemplary embodiment of the present invention to calculate charges for date calculations. The Charges Matrix Table includes amounts to charge for each rule set billing type for a number of dates generated and/or changed. When new dates are added, or dates in an existing group of dates are changed because of the addition of a new date, the court date server uses the Charges Matrix Table to determine how much to charge the user based on the number of additions and/or changes and the billing type of rule sets used. For example, if a new Key Date is added that generates 10 new events for a rule set of billing type 1, the user is charged \$10. If a Key Date is added to an existing group of dates causing two (2) new dates to be added to the group and two (2) existing dates to be recalculated,

1 the user is charged \$5 if the rule set used has a billing type of 1, \$2.50 for billing type 2 and \$2.50
for billing type 3.

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Table 2	
Field	Description
BillingType	Rule Set billing type.
NumAddsChgs	Upper limit for the number of changes/additions this record applies to. See below for an example of the data contained in this table.
Amount	Amount to charge.

Table 3 is a User Accounts Table in accordance with an exemplary embodiment of the present invention. The User Accounts Table holds primary user account data.

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Table 3	
Field	Description
CustID	Unique record ID. Primary key.
FirstName	User's first name.
LastName	User's last name.
EMailAddress	User's e-mail address. Also serves as the user login name. Date change notices and other e-mails are sent to this account.

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	Contents are encrypted.
DOBMonth	Month part of date of birth.
DOBDay	Day part of date of birth.
DOBYear	Year part of date of birth.
Password	Users password. Contents are encrypted.
PasswordQ	Password question. This question is asked when the user has forgotten their password and needs us to e-mail it to them. Contents are encrypted.
PasswordA	Password answer. In order for us to e-mail the users password the user must provide the correct answer (this field) the Password Question.
NotifyChanges	Notify user when any of their dates are changed because of changes to the

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	rules.
RemEmails	Send reminder e-mails? This option is "On" by default.
Inactive	Is this user record inactive? Can only be set by administrator.
OnMailingList	Has the user selected to be on our mailing list. Will receive data about Administrator products and special offers.
OtherMailing	Has the user selected to receive occasional third party product data?
SubscriptLevel	User subscription level. Determines which application functions can be accessed. NULL = all functions.
CorpAccount	Is this a corporate account?
CorpAccountID	This field will have the ID of the corporate

1		account record if this user is part of a corporate account.
5	TrialPeriod	Number of days in user's trial period.
10	Credit	Allows us to apply a credit to the users account.
	Discount	Percentage discount. 0 to 100 percent.
15	Visits	Number of times the user has logged into our site.
	LastVistedOn	Date and time of last visit (log on) to our site.
20	AddedOn	Date and time record was added.
	ChangedOn	Date and time record was last changed.
25	BillingType	Includes the billing type. Can be set to "Monthly statement" or "Bill credit card". The "Monthly statement" setting can only be used on
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	corporate accounts.
CRCardType	Credit card type (American Express, Master Card, etc).
CRCardNumber	Credit card number. This field is 128-bit encrypted.
CRExpireMonth	Credit card expiration month.
CRExpireYear	Credit card expiration year.

The Password, PasswordQ, PasswordA EmailAddress and CRCardNumber fields are 128-bit encrypted. The DOBMonth, DOBDay and DOBYear fields are used to authenticate the user before allowing the user to view their password question (PasswordQ). The password question is asked when the user has forgotten their password and is requesting that the password be e-mailed to the user.

Table 4 is a Firm Information table in accordance with an exemplary embodiment of the present invention. The Firm Information table includes firm data associated with a user's account record. This data is used for product update notices, special offers from alliance partners and date change notifications.

Table 4	
Field	Description
ID	Unique record ID. Primary key.
CustID	User ID. Foreign key.
FirmName	Office name. Indexed.
Address1	Mailing address line.
Address2	Mailing address line.
City	City. Indexed.
StateProv	State or Province. Indexed.
ZipPCode	Zip or Postal Code. Indexed.
Country	Country code. Selected from a pulldown list.
Phone	Work phone number.

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The above table does not contain any primary contact or e-mail address data. This data is retrieved from an associated User Account table when needed. A Billing Information table includes alternate e-mail and contact data if this data is different than what is in the primary User Account/Firm Information tables.

Table 5 is a Billing Information Table includes billing data for a user. If no billing address data is provided then address data in the User Information table is used.

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Table 5	
Field	Description
ID	Unique record ID. Primary key.
CustID	User ID. Foreign key.
BillingName	Billing name if different than FirmName in the Firm Information table. Indexed.
Attention	Attention name.
Address1	Billing address line.
Address2	Billing address line.
City	City. Indexed.
StateProv	State or Province. Indexed.
ZipPCode	Zip or Postal Code. Indexed.
Country	Country code. Selected from a pulldown list.
Phone	Billing phone.
EMailAddress	Billing e-mail address. Encrypted.

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Table 6 is a Transaction Log Table used to track data about dates generated by a user each time the user generates dates.

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Table 6	
Field	Description
TransID	Unique record ID. Primary key.
CustID	User ID. Foreign key.

1	DateTime	Date and time of the transaction. Indexed.
5	AmountBilled	Amount billed for this transaction.
10	NumDatesAdded	Number of dates generated by the transaction. If the user added dates to an existing group then this number is the number of new dates added to the group.
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The court rule database includes tables used to schedule court deadlines. The court rule database further includes data used by the JSE and ESE. Table 7 is a Rule Sets table including data about each rule set in the court rule database.

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Table 7	
Field	Description
Code	Rule set code.
RSType	Is this a System or User rule set?
25 Active	Is this rule set active?
CurrentAsOf	Update date for the rule set.
AccessCode	Rule set activation code.
30 CreatedOn	Date the rule set was created.
NextFormulaID	Next available formula ID for this rule set.
ChangeEvData	Change event data?
UseGlobalSettings	Use the global event maintenance settings?
35 ProcessCompleted	Process completed events during event

1		maintenance?
	AddNewEvents	Add new events if needed during event maintenance?
5	AlterIfDateChanged	Alter events if the due date has been changed by the user?
	CutoffDate	Event Maintenance cutoff date.
10	Description	Rule set description (name)
	ExpertData	Jurisdiction Selection Expert data.

Table 8 is a Formulas table as used in an exemplary embodiment of the present invention. The Formulas table includes formulas for each rule set in the court rule database.

Table 8	
Field	Description
RuleSet	Rule set containing this formula.
FormulaID	Unique ID of the formula within the rule set.
Ftype	Type of formula: Trigger or Related.
Category	Category code.
Priority	Priority code.
Authority	Authority text.
UpdatedOn	Last updated on this date.
Description	Formulas description. Can be up to 1024 characters.
ExpertData	Event Selection Expert data (trigger formulas only). Can be up to 1024

	characters.
Script	Formula calculation script. Can be up to 4096 characters.

When a formula is added or changed, a Formula Relationship table is updated to include appropriate scheduling data. Table 9 is a formula relationship table in accordance with an exemplary embodiment of the present invention. A Formula Relationship table includes relationship data for each formula in the court rule database. The relationship data is used to track which formulas are scheduled when a particular trigger formula is scheduled allowing retrieval of data for scheduling and display purposes.

Table 9	
Field	Description
RuleSet	Rule set containing the formula.
FormulaID	Unique ID of formula within the rule set.
Trigger	If the formula is a "trigger" formula then its trigger code is placed here.
Related	The trigger code of the relationship is placed in this field.

When a formula is saved, entries are made in the Formula Relationship table and the formula script is evaluated for relationships with other formulas. If relationships are found, an entry is made in the Formula Relationship table for each relationship.

There are a few scenarios that are handled to create an accurate relationship table:

Scenario 1 – Single Trigger Relationship

RESULT = CALCDATE 30 DAYS BEFORE TRIGGER \$TR

1 In this scenario, a “Related” formula calculates a date that is 30 days before the \$TR trigger date. This relationship is a one-to-one relationship. For example, if the ID of the formula is “CA:LA-FT-123”, the table entry would look like this:

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Rule Set	Formula ID	Trigger	Related
CA:LA-FT	123	NULL	\$TR

The formula is included when scheduling a \$TR trigger date is scheduled because “\$TR” is in the “Related” Field.

10 Scenario 2 – Multiple Trigger Relationship

D1 = CALCDATE 35 DAYS BEFORE TRIGGER \$TR

D2 = CALCDATE 70 DAYS AFTER TRIGGER \$TS

15 RESULT = LATER D1, D2

In this scenario a “Related” formula bases the formula's calculation off more than one trigger date. In this case the formula uses the \$TR and \$TS trigger dates for the formula's calculation. For example, if the ID of the formula is “CA:LA-100”, the table entries would look like this:

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Rule Set	Formula ID	Trigger	Related
CA:LA-FT	100	NULL	\$TR
CA:LA-FT	100	NULL	\$TS

25 When the \$TR trigger date is scheduled, this formula will be included because it references \$TR in “Related” Field for the first entry in the table.

Scenario 3 – Single Related Relationship

30 RESULT = CALCDATE 10 DAYS BEFORE RELATED CA:LA-FT-123

This calculation is based on a specific related formula (formula “CA:LA-FT-123”). In this case, the court date server resolves the formula ID into a trigger code before making an entry in the Formula Relationship table. The formula referenced by the calculation above is examined to determine if it can be resolved into a trigger code. If the specified formula cannot be resolved into a trigger code (because it also bases its calculation on a specific

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related formula) then an attempt is made to retrieve the trigger code from the formula that it references. This continues until the trigger code is found. If no "Trigger Code" is found then no date is calculated for the formula (this could occur if the "CA:LA-FT-123" formula is deleted). For example, the "CA:LA-FT-124" formula bases its date calculation off the \$TR trigger formula. In this case, the resolution of the "Trigger Code" would be \$TR and the table entry would look like this:

Rule Set	Formula ID	Trigger	Related
CA:LA-FT	40	NULL	\$TR

Note that the related formula used by the date calculation script is in the same rule set as the formula being calculated.

As another example, if the related formula used for the calculation bases its calculation off more than one trigger date, such as "CA:LA-FT-123", the date calculation is as follows:

D1 = CALCDATE 35 DAYS BEFORE TRIGGER \$TR
 D2 = CALCDATE 70 DAYS AFTER TRIGGER \$TS
 RESULT = LATER D1, D2

In this case the following entry would be made in the relationship table as:

Rule Set	Formula ID	Trigger	Related
CA:LA-FT	100	NULL	\$TR
CA:LA-FT	100	NULL	\$TS

Scenario 4 – Branching Trigger

A "Branch Trigger" is a trigger whose date can either be provided by the user when the trigger is scheduled or can be scheduled when another trigger date is scheduled. For example, a "Discover Cutoff" date can be scheduled by itself or as part of a trial. In this case, the calculation for the "Discover Cutoff" trigger formula looks like this:

RESULT = CALCDATE 30 DAYS BEFORE TRIGGER \$TR

The table entry for this formula looks like this (assuming a formula ID of "CA:LA-FT-32"):

Rule Set	Formula ID	Trigger	Related
CA:LA-FT	32	\$DC	\$TR

In the case where the “Branching Trigger” formula bases its calculation on more than one trigger formula the following would be added to the table (“TRIGGER \$TR” and “TRIGGER \$XX” are referenced by the formula):

Rule Set	Formula ID	Trigger	Related
CA:LA-FT	32	\$DC	\$TR
CA:LA-FT	32	\$DC	\$XX

Scenario 5 – Trigger Formula

In this scenario the trigger formula does not contain a calculation script. The user must provide the date when the trigger is scheduled. In this case the table entry looks like this:

Rule Set	Formula ID	Trigger	Related
CA:LA-FT	1	\$TR	NULL

A “delete” trigger on the Formulas table handles deleting entries in this table when a formula is deleted.

A Rule Set Type table includes billing types for each rule set. A billing type is used to access an additional charge when generating dates using a particular rule set. Table 10 is a Rule Set Type table in accordance with an exemplary embodiment of the present invention.

Table 10	
Field	Description
RuleSet	Rule set code.
BillingType	This is the rule sets billing type value. This value is used to look up any additional amount to charge when dates are generated using a particular type of rule set.

1 A Formula Changes Index table includes an entry for each change made to a formula.
 When an administrator of a court date server adds, changes or deletes a formula, an entry is made
 in the Formula Changes Index for the change. The previously described Event Maintenance
 process uses the data in the Formula Changes Index table to process existing events for formula
 5 additions, changes or deletions. Table 11 is a Formula Changes Index table in accordance with
 an exemplary embodiment of the present invention.

Table 11	
Field	Description
URI	Unique record ID. Numeric identity field.
ChangeType	Type of change made to the formula. 0=Undefined, 1=Added, 2=Changed, 3=Corrected, 4=Deleted.
Finalized	Setting this field "finalizes" the change essentially releasing the change to the Event Maintenance Process.
Processed	Has Event Maintenance finished processing this change?
AddedOn	The date and time the index record was added to the table.
AddedBy	The user that made the formula change that caused an entry to be made in this table.
ProcessedOn	Date and time Event Maintenance finished applying this change to existing events.
RuleSet	Rule set code. This field and the FormulaID field below comprise the unique formula ID.
FormulaID	Unique ID within the rule

	set specified by the RuleSet field.

A formula changes detail table (not shown) includes formula records for each change made to a formula. It's structure is identical to the previously described formulas table structure except that the constraint on duplicate formula ID's is removed.

A docket data database includes user matter and calendar data. A matters table includes matters added by a user. Matters can be added to this table when generating dates or from the user's administration page. Table 12 is a matters table in accordance with an exemplary embodiment of the present invention.

Table 12	
Field	Description
MatterID	Identity field.
CustID	User ID.
MatterName	Name of the matter.
DocketID	Docket ID.
MatterType	Matter type code.
RuleSets	Comma delimited list of default rule sets.
	Assigned by selecting the Venue from the Jurisdiction Selection Expert.
DateOpened	Date the matter was opened.
DateClosed	Date the matter was closed.
Inactive	Matter is no longer active. Any attempt to use this matter results in an error.
DeletedOn	The date the user deleted this matter. Delete matters older than a certain period of time are periodically removed from the database.

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A Matter Formulas table includes special matter date calculation formulas that are applied to certain types of formula calculations. Table 13 is a Matter Formulas table in accordance with an exemplary embodiment of the present invention.

Table 13	
Field	Description
MatterID	Identity field.
FormulaTag	Tag string. For example, this field would contain the tag "MOTION" if the formula is applied to motion dates.
Script	Includes the date calculation script. Can be up to 4096 characters.

An Event Group table includes event groups generated by users. Table 14 is an Event Group table in accordance with an exemplary embodiment of the present invention.

Table 14	
Field	Description
GroupID	Unique record ID. Primary key.
MatterID	Matter ID. Foreign key.
RuleSets	Comma delimited list of rule sets used.
AddedOn	Date and time the group was added. Indexed.
LastChangedOn	Date and time the group was last changed. Indexed.

An Events table stores the dates generated by a user. Each record in the Events table is linked to an Event Group record via a GroupID entry. Table 15 is an Events table in accordance with an exemplary embodiment of the present invention.

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Table 15	
Field	Description
ID	Identity field. Primary key.
GroupID	Event Group ID. Foreign key linked to the Event Group Table.
RuleSetUsed	Rule set used to schedule this date. Indexed.
FormulaID	ID of the formula within the specified Rule Set. Indexed.
EventDate	Event date. Indexed.
StartTime	Event start time.
EndTime	Event end time.
Reminder	Send a reminder e-mail on this date.
RemSentOn	Date a reminder e-mail was sent to the user.
Complete	Has the event been completed?
Skipped	Has the event been skipped by the user?
DontChange	Never change this date even if the rules change. The user can set this and it is also set if the date or time is changed from its originally calculated date or time.
DeletedOn	Date the user deleted this event. Deleted events are periodically removed from the database by administrator.
Note	Variable length note field. Up to 1024 characters.

1 An event maintenance database includes tables used to track event date change data and
 user notification data. If any user dates are changed during an Event Maintenance process, a
 master entry is made in an Event Maintenance Log table and the changes associated with the
 master entry are written to an Event Maintenance Detail table. These tables are later used to
 5 notify users of changes to their dates.

Table 16 is an Event Maintenance Log table in accordance with an exemplary
 embodiment of the present invention.

Table 16	
Field	Description
LogID	Identity field. Primary key.
CustID	User ID (link to the Account table). Foreign key.
ChangedOn	Date and time the changes were made (the date the log entry was added to the table).
NotifiedOn	Date user was notified of any changes made to any of their dates.
TimesNotified	How many times the user has been notified about this change.
Confirmed	Has the user confirmed notification of changes? Confirmation is performed by returning the notification e-mail to administrator.
AllGroupsProcessed	Have all the event

1		groups effected by Event Maintenance for this user been processed? Set to True if the user never confirms any of the notification e-mails. Number of changed records.
5	NeverConfirmed	
	NumChanges	
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Table 17 is an Event Maintenance Detail table in accordance with an exemplary embodiment of the present invention.

	Table 17	
15	Field	Description
	LogID	Event Maintenance Log record ID. Foreign key used to link to the ID field of the Event Maintenance Log table.
20	EventID	Event ID (link to the Event table). Foreign key.
25	Changes	This field includes the detail of the changes made. Each change is described in one sentence. For example "Date changed from 02/10/2002 to 02/09/2002".

30 Court schedule rules are defined within a court date server using a Date Calculation Scripting Language (DCSL). DCSL includes statements used to calculate court date according to rules defined by the courts. DCSL is designed to be as flexible as possible allowing for all current, and future, date calculation requirements.

35 DCSL allows the use of Formula Variable arrays by a formula calculation. The Formula Variable arrays are created when a formula is calculated and destroyed when the formula has

completed. The scope of the Formula Variables are local to the currently executing formula. In addition, a formula has the following variables it can use during its script execution.

Variables	Description
RESULT	A date variable that includes a result of a formula calculation. Initialized to 0 (EMPTY) before the script executes.
D0...DF	16 date variables. Can be used to store any valid date value.
I0...I9	10 Integer variables.

A "Date Calculation Expression" is a text string that includes data on how to calculate a date and has the following format:

{amount} {unit} {direction} {event}

Where:

{amount}	Number of units to calculate.
{unit}	Calculation unit. [HOURS COURTHOURS DAYS COURTDAYS WEEKS MONTHS YEARS].
{direction}	Direction of calculation. [BEFORE AFTER]
{event}	A target date (event) on which to base the calculation. [TRIGGER RELATED] [Key Code Formula ID].

DCSL includes the following statements:

An "ADD" statement adds two integers. The ADD syntax is:

ADD {integer1}, {integer 2}

An "ADJUST" statement is used to adjust a date a specified number of units in the specified direction. Calculations using COURTHOURS and COURTDAYS units are guaranteed to fall on a court workday. For all other unit settings, use the ADJUSTHOLIDAY statement to ensure that the calculated date falls on a valid court day. The ADJUST syntax is:

ADJUST {date variable} {direction} {amount} {unit}

Where:

{date variable}	A valid date variable.
{direction}	Direction of adjustment from the calculated date [FORWARD BACKWARD]

1 {amount} Number of units to calculate.
 {unit} Calculation unit. [HOURS | COURTHOURS |
 DAYS | COURTDAYS | WEEKS | MONTHS |
 YEARS].

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An "ADJUSTDOW" statement adjusts a date to a specified day of the week. Adjustments that use a CONTINUE option are guaranteed to fall on a court workday. The syntax of the ADJUSTDOW statement is:

10 ADJUSTDOW {date variable} TO {direction} {dow} [WITH {options}]
 Where:

 {date variable} A valid date variable or string date.
 {direction} DOW adjustment direction. [PREVIOUS |
 NEXT]
 15 {dow} Day of Week adjustment setting.
 [MONDAY | TUESDAY | WEDNESDAY |
 THURSDAY | FRIDAY | SATURDAY |
 SUNDAY]
 {options} Optional adjustment options. Currently only
 20 CONTINUE is supported. The CONTINUE
 option "continues" the DOW adjustment to
 the next/previous day of the week if the
 adjusted date falls on a court holiday.

25 An "ADJUSTHOLIDAY" statement adjusts the specified date to the next or previous court
 workday. The rule set's holiday list is used to perform this adjustment. The syntax of the
 ADJUSTHOLIDAY statement is:

 ADJUSTHOLIDAY {date variable} TO {direction} COURTDAY
 30 Where:

 {date variable} A valid date variable or string date.
 {direction} Direction of adjustment. [NEXT | PREVIOUS].

35 An "ADJUSTSPECIAL" statement is used to apply adjustments defined at the matter level.
 For example when a judge assigned to a matter only hears motions on Mondays. A calculation

1 formula can be created for a matter so that when a "Motion" date is calculated the matter formula
 for "Motion" can be used to adjust the calculated date. A current unique Matter ID is used when
 retrieving the calculation formula from the appropriate table for the matter. Each date calculation
 session has a unique Matter ID which allows this statement to retrieve the adjustment formula
 5 from matter data. The unique Matter ID is referred to as a "Matter Context". If no matter
 context exists, or no special formula is found for the specified "tag", the date is not changed. The
 statement simply returns the date that was passed to it in the {date variable} argument. The
 syntax of the ADJUSTSPECIAL statement is:

10 ADJUSTSPECIAL date variable} {"tag"}

Where:

{date variable}	Any valid date variable or string date.
{"tag"}	Tag indicating which special formula to use for the 15 matter when adjusting the date.

An "ADJUSTWMY" statement is used to adjust a date to the beginning or end of the
 week, month or year the date falls within. The adjusted date is not guaranteed to fall on a
 court workday. The syntax of the ADJUSTWMY statement is:

20 ADJUSTWMY {date variable} TO {direction} OF {unit}

{date variable}	A valid date variable or string date.
{direction}	Adjustment direction. [BEGINNING END]
{unit}	Unit adjustment setting. [WEEK MONTH 25 YEAR]

An "ASSIGNMENT" statement (=) assigns a variable a value.

A "CALCDATE" statement calculates a date based on another date. If the date on which the
 30 calculation is based has not yet been calculated then that date is first calculated and the execution
 of the CALCDATE statement continues. The CALCDATE statement does not adjust the
 calculated date for court holidays if the calculation is not based on the COURTHOURS or
 COURTDAYS units. DCSL does not allow circular formula references. The syntax of the
 CALCDATE statement is:

35 CALCDATE {calculation}

1 Where:

 {calculation} A valid date calculation expression.

5 A "COMPLETE" statement is used to complete the dates calculated using specified formulas. Whether or not the event is actually marked "completed" when this statement executes depends on how a user's "Auto complete events" option is set. The syntax of the COMPLETE statement is:

 COMPLETE {note} {formula list}

10

 {note} A notation assigned to the dates marked
 completed by this statement.
 {formula list} List of formula Ids whose dates you wish to
 mark completed.

15

 A "DATEDIFF" statement is used to get the difference in days between two dates. The order of the dates doesn't matter. "date1" could be greater than or less than "date2". The syntax of the DATEDIFF statement is:

 DATEDIFF {date1}, {date2}

20

 A "DELETE" statement is used to delete the dates calculated using the specified formulas. The syntax of the DELETE statement is:

 DELETE {note} {formula list}

25

 Where:

 {note} The notation assigned to the dates marked deleted
 by this statement. Can be up to 80 characters.
 {formula list} List of formula Ids whose dates you wish to delete.

30

 An "EARLIER" statement returns the earlier of the dates in a list of date variables. The syntax of an EARLIER statement is:

 EARLIER {date var list}

 Where:

35

1 {date var list} List of date variables to compare. Can contain any
number of valid date variables.

5 An "EXIT" statement is used to statement to exit a formula before the formula has completed
execution. The syntax of an EXIT statement is:

EXIT

10 A "GETDATE" statement is used to retrieve the date of an event whose calculation is based
on the specified formula. If the date for the specified formula has not been calculated, this
statement causes the specified formula to calculate the date. The syntax of a GETDATE
statement is:

15 GETDATE {date variable} {type} {formula id | key code}

Where:

20	{date variable}	A valid date variable.
	{type}	Type of date. [TRIGGER RELATED].
	{formula id key code}	Any valid formula id or key code. [formula id key code]

A "GETDATE" statement sets the date variable D1 to the date calculated by the
specified related formula. The syntax of a GETDATE statement is:

GETDATE D1 TRIGGER \$TR

25 An "IF THEN" statement is used to perform an action conditionally. The syntax of the IF
THEN statement is:

IF {condition} THEN {action block}

30 Where:

35	{condition}	The condition clause. The values compared must be the same type. [> < != = >= <=].
	{action block}	Includes an action statement or statements. If more that one statement you must bracket the

1 action block with BEGIN...ENDIF.

Another form of the IF THEN statement is:

5 IF [NOT] EXISTS {type} {formula id} THEN {action block}

Where:

10	{type}	Type of date. [TRIGGER RELATED].
	{formula id}	Any valid formula id or key code.
	{action block}	[formula id key code] Action or action block.

15 This condition statement is used to perform an action if a date exists for the specified formula. The optional NOT can be used to test if a date does not exist.

A "LATER" statement returns the later of the dates in a list of date variables. The syntax of the LATER statement is:

20 LATER {date var list}

Where:

{date var list} List of date variables to compare.

25 A "NOTAPPLICABLE" statement is used to mark a date as "not applicable". This means that the addition of some other date has made the dates specified in the statement unnecessary. The syntax of a NOTAPPLICABLE statement is:

30 NOTAPPLICABLE {Note} {formula list}

Where:

35	{Note}	The notation assigned to the dates marked "Not Applicable" by this statement.
	{formula list}	List of formula Ids whose dates you wish to mark as "not applicable".

1

A "REM" statement adds a comment to the formula calculation script. The syntax of a REM statement is:

5

REM {comment text}

Where:

10

{comment text} Message text string.

A "SUBTRACT" statement is used to subtract two integers. Integer2 is subtracted from Integer1. The syntax of a SUBTRACT statement is:

15

SUBTRACT {integer1}, {integer 2}

Referring again to FIG. 1, a DCE 102 performs court date calculations based on court rules stored in a court rule database 104. The DCE includes a date calculation script interpreter 103 that processes DCSL.

20

FIG. 20 is a hardware architecture diagram of a data process system such as a general purpose computer suitable for use as a court date server host. A processor 2000 is coupled via a system bus 2002 to a main memory 2004 and an I/O control unit 2006. The I/O control unit is coupled via an I/O local bus 2008 to a storage controller 2010, and a network controller 2016.

25

The storage controller is coupled to a storage device 2012. Computer program instructions 2014 implementing a court date server are stored on the storage device until the processor retrieves the computer program instructions and stores them in the main memory. The processor then executes the computer program instructions stored in the main memory to implement the features of a court date server.

30

The network controller is operatively coupled to communications device 2018. The communications device is adapted to allow a court date server hosted by the general purpose computer to communicate via a computer network such as the Internet with other software objects on the computer network such as a user client.

35

Although this invention has been described in certain specific embodiments, many additional modifications and variations would be apparent to those skilled in the art. It is therefore to be understood that this invention may be practiced otherwise than as specifically described. Thus, the present embodiments of the invention should be considered in all respects

1 as illustrative and not restrictive, the scope of the invention to be determined by any claims
supportable by this application and the claims' equivalents.

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1 WHAT IS CLAIMED IS:

1. A method for calculating a court date, comprising:
receiving event data for an event;
receiving a court rule for the court date, the court rule including event date
5 calculation instructions for calculating the court date; and
calculating the court date using the event date calculation instructions and the
event data.
2. The method of claim 1, wherein the event is a trigger event, the method further
10 comprising calculating a plurality of court dates related to the trigger event.
3. The method of claim 2, wherein the trigger event is related to a branching trigger
event, the method further comprising calculating a plurality of additional court dates for the
branching trigger event.
- 15 4. The method of claim 1, wherein the date calculation instructions are included in
a formula including a date calculation expression written in a Date Calculation Scripting
Language (DCSL).
- 20 5. The method of claim 4, wherein the DCSL includes a statement to adjust a date
a specified number of units in a specified direction.
6. The method of claim 4, wherein the DCSL includes a statement to adjust a date
to a specified day of the week.
- 25 7. The method of claim 4, wherein the DCSL includes a statement to adjust a
specified date to a next court workday.
8. The method of claim 4, wherein the DCSL includes a statement to adjust a
30 specified date to a previous court workday.
9. The method of claim 4, wherein the DCSL includes a statement to adjust a
specified date to a date defined at a matter level.
- 35 10. The method of claim 4, wherein the DCSL includes a statement to adjust a date to the
end of a week.

1 11. The method of claim 4, wherein the DCSL includes a statement to adjust a date to the
beginning of a week.

5 12. The method of claim 4, wherein the DCSL includes an assignment statement for
assigning a value to a variable.

 13. The method of claim 4, wherein the DCSL includes a statement to calculate a date
based on another date.

10 14. The method of claim 4, wherein the DCSL includes a statement to complete a date
using a specified formula.

 15. The method of claim 4, wherein the DCSL includes a statement to find a
difference in days between two dates.

15 16. The method of claim 4, wherein the DCSL includes a statement to delete a date
calculated using a specified formula.

20 17. The method of claim 4, wherein the DCSL includes a statement to retrieve a date
of an event whose calculation is based on a specified formula.

 18. The method of claim 4, wherein the DCSL includes a date conditional statement.

25 19. The method of claim 4, wherein the DCSL includes a conditional statement
testing the existence of a date.

 20. The method of claim 4, wherein the DCSL includes a statement to return a latest
date from a set of dates.

30 21. The method of claim 4, wherein the DCSL includes a statement to mark a date
so that the date is no longer calculated.

 22. A data processing system for generating a court date by a date calculation engine,
comprising:
35 a processor; and

1 a memory coupled to the processor and having program instructions stored therein, the processor being operable to execute the program instructions, the program instructions including:

 receiving event data for an event;

5 receiving a court rule for the court date, the court rule including event date calculation instructions for calculating the court date; and

 calculating the court date using the event date calculation instructions and the event data.

10 23. The data processing system of claim 22, wherein the event is a trigger event, the method further comprising calculating a plurality of court dates related to the trigger event.

 24. The data processing system of claim 23, wherein the trigger event is related to a branching trigger event, the method further comprising calculating a plurality of additional court
15 dates for the branching trigger event.

 25. The data processing system of claim 22, wherein the date calculation instructions are included in a formula including a date calculation expression written in a Date Calculation Scripting Language (DCSL).
20

 26. The data processing system of claim 25, wherein the DCSL includes a statement to adjust a date a specified number of units in a specified direction.

 27. The data processing system of claim 25, wherein the DCSL includes a statement
25 to adjust a date to a specified day of the week.

 28. The data processing system of claim 25, wherein the DCSL includes a statement to adjust a specified date to a next court workday.

30 29. The data processing system of claim 25, wherein the DCSL includes a statement to adjust a specified date to a previous court workday.

 30. The data processing system of claim 25, wherein the DCSL includes a statement to adjust a specified date to a date defined at a matter level.
35

1 31. The data processing system of claim 25, wherein the DCSL includes a statement to
adjust a date to the end of a week.

5 32. The data processing system of claim 25, wherein the DCSL includes a statement to
adjust a date to the beginning of a week.

 33. The data processing system of claim 25, wherein the DCSL includes an
assignment statement for assigning a value to a variable.

10 34. The data processing system of claim 25, wherein the DCSL includes a statement
to calculate a date based on another date.

 35. The data processing system of claim 25, wherein the DCSL includes a statement
to complete a date using a specified formula.

15 36. The data processing system of claim 25, wherein the DCSL includes a statement
to find a difference in days between two dates.

 37. The data processing system of claim 25, wherein the DCSL includes a statement
20 to delete a date calculated using a specified formula.

 38. The data processing system of claim 25, wherein the DCSL includes a statement
to retrieve a date of an event whose calculation is based on a specified formula.

25 39. The data processing system of claim 25, wherein the DCSL includes a date
conditional statement.

 40. The data processing system of claim 25, wherein the DCSL includes a conditional
statement testing the existence of a date.

30 41. The data processing system of claim 25, wherein the DCSL includes a statement
to return a 1 date from a set of dates.

 42. The data processing system of claim 25, wherein the DCSL includes a statement
35 to mark a date so that the date is no longer calculated.

1 43. The method of claim 4, wherein the DCSL includes a statement to return an
earliest date from a set of dates.

5 44. The data processing system of claim 25, wherein the DCSL includes a statement
to return an earliest date from a set of dates.

10 45. A method of generating an event date for a court calendar, comprising:
 receiving an providing a court rule database coupled to the court date server;
 receiving event data and jurisdiction data by the court date server from the user
client via the communications network;
 getting a court rule by the court date server from the court rule database using the
event data and the jurisdiction data; and
 generating an event date by the court date server using the event data and the court
rule.

15 46. The method of claim 45 further comprising:
 providing a user database coupled to the court date server, the user database
including user data for a user; and
 putting the event date by the court date server into the user database associated
20 with the user data.

 47. The method of claim 46 wherein the user data further includes a user electronic mail
address for the user, the method further comprising:
 getting the event date by the court date server from the user database;
25 getting the user electronic mail address by the court date server from the user
database;
 generating a reminder electronic mail message by the court date server using the
event date; and
 transmitting the reminder electronic mail message by the court date server to the
30 user via the communications network using the user electronic mail address.

 48. The method of claim 47, further comprising:
 including a reminder response link in the reminder electronic mail message; and
 receiving a user reminder response by the court date server from the user using
35 the reminder response link.

1 49. The method of claim 46 wherein the user data further includes a user electronic
mail address for the user, the method further comprising:

 receiving an updated court rule by the court date server;

 getting the event date by the court date server from the user database;

5 generating an updated event date by the court date server using the event date and
the updated court rule;

 generating a notification electronic mail message by the court date server using
the updated event date; and

 transmitting the notification electronic mail message by the court date server to
10 the user via the communications network using the user electronic mail address.

50. The method of claim 49, further comprising:

 including a notification response link in the notification electronic mail message;

and

15 receiving a user notification response by the court date server from the user using
the notification response link.

51. The method of claim 45 further comprising:

 receiving user billing data for a user by the court date server from the user client
20 via the communications link;

 generating an event generation charges document;

 transmitting the event generation charges document by the court date server to the
user client via the communications network;

 receiving a user acceptance in response to the event generation charges document
25 by the court date server from the user client via the communications network;

 generating an event date list by the court date server using the generated event
date; and

 transmitting the event date list by the court date server to the user client via the
communications network.

30 52. The method of claim 51 further comprising charging the user for the generated
date using the user billing information.

53. The method of claim 46, further comprising:

35 receiving user billing data for a user by the court date server from the user client
via the communications link;

1 generating an event generation charges document including a proposed charge to
the user for storing the event date;
 transmitting the event generation charges document by the court date server to the
user client via the communications network;
5 receiving a user acceptance in response to the event generation charges document
by the court date server from the user client via the communications network;
 generating an event date list by the court date server using the generated event
date; and
 transmitting the event date list by the court date server to the user client via the
10 communications network.

54. The method of claim 53 further comprising charging the user for storing the event
date using the user billing information.

15 55. A method of generating a court calendar by a court date server coupled to a user
client over a communications network, comprising:
 providing a court rule database coupled to the court date server;
 providing a user database coupled to the court date server, the user database
including user data for a user;
20 receiving event data and jurisdiction data by the court date server from the user
client via the communications network;
 getting a court rule by the court date server from the court rule database using the
event data and the jurisdiction data;
 generating an event date by the court date server using the event data and the court
25 rule;
 putting the event date by the court date server into the user database associated
with the user data;
 generating an event date list by the court date server using the generated event
date; and
30 transmitting the event date list by the court date server to the user client via the
communications network.

56. The method of claim 55 wherein the user data further includes a user electronic
mail address for the user, the method further comprising:
35 getting the event date by the court date server from the user database;

1 getting the user electronic mail address by the court date server from the user
database;
 generating a reminder electronic mail message by the court date server using the
event date; and
5 transmitting the reminder electronic mail message by the court date server to the
user via the communications network using the user electronic mail address.

57. The method of claim 55 wherein the user data further includes a user electronic
mail address for the user, the method further comprising:
10 receiving an updated court rule by the court date server;
 getting the event date by the court date server from the user database;
 generating an updated event date by the court date server using the event date and
the updated court rule;
 generating a notification electronic mail message by the court date server using
15 the updated event date; and
 transmitting the notification electronic mail message by the court date server to
the user via the communications network using the user electronic mail address.

58. A court date server for generating a court calendar, the court date server coupled to
20 a user client over a communications network and to a court rule database, comprising:
 a processor; and
 a memory coupled to the processor and having program instructions stored
therein, the processor being operable to execute the program instructions, the program
instructions including:
25 receiving event data and jurisdiction data by the court date server from the
user client via the communications network;
 getting a court rule by the court date server from the court rule database
using the event data and the jurisdiction data; and
30 generating an event date by the court date server using the event data and
the court rule.

59. The court date server of claim 58 wherein the court date server is further coupled
to a user database, the user database including user data for a user, the instructions further
35 including putting the event date by the court date server into the user database associated with
the user data.

1 60. The court date server of claim 59 wherein the user data further includes a user electronic mail address for the user, the instructions further including:

 getting the event date by the court date server from the user database;

5 getting the user electronic mail address by the court date server from the user database;

 generating a reminder electronic mail message by the court date server using the event date; and

 transmitting the reminder electronic mail message by the court date server to the user via the communications network using the user electronic mail address.

10 61. The court date server of claim 60, the instructions further including:
 including a reminder response link in the reminder electronic mail message; and
 receiving a user reminder response by the court date server from the user using the reminder response link.

15 62. The court date server of claim 59 wherein the user data further includes a user electronic mail address for the user, the instructions further including:

 receiving an updated court rule by the court date server;

 getting the event date by the court date server from the user database;

20 generating an updated event date by the court date server using the event date and the updated court rule;

 generating a notification electronic mail message by the court date server using the updated event date; and

25 transmitting the notification electronic mail message by the court date server to the user via the communications network using the user electronic mail address.

30 63. The court date server of claim 62, the instructions further including:
 including a notification response link in the notification electronic mail message;
 and

 receiving a user notification response by the court date server from the user using the notification response link.

35 64. The court date server of claim 58, the instructions further including:
 receiving user billing data for a user by the court date server from the user client via the communications link;

 generating an event generation charges document;

1 transmitting the event generation charges document by the court date server to the user client via the communications network;

receiving a user acceptance in response to the event generation charges document by the court date server from the user client via the communications network;

5 generating an event date list by the court date server using the generated event date; and

transmitting the event date list by the court date server to the user client via the communications network.

10 65. The court date server of claim 64 further comprising charging the user for the generated date using the user billing information.

66. The court date server of claim 59, the instructions further including:

15 receiving user billing data for a user by the court date server from the user client via the communications link;

generating an event generation charges document including a proposed charge to the user for storing the event date;

transmitting the event generation charges document by the court date server to the user client via the communications network;

20 receiving a user acceptance in response to the event generation charges document by the court date server from the user client via the communications network;

generating an event date list by the court date server using the generated event date; and

25 transmitting the event date list by the court date server to the user client via the communications network.

67. The court date server of claim 66, the instructions further including charging the user for storing the event date using the user billing information.

30 68. A court date server for generating a court calendar, the court date server coupled to a user client over a communications network, to a court rule database, and to a user database, the user database including user data for a user, the court date server comprising:

a processor; and

35 a memory coupled to the processor and having program instructions stored therein, the processor being operable to execute the program instructions, the program instructions including:

1 receiving event data and jurisdiction data by the court date server from the
user client via the communications network;
getting a court rule by the court date server from the court rule database
using the event data and the jurisdiction data;
5 generating an event date by the court date server using the event data and
the court rule;
putting the event date by the court date server into the user database
associated with the user data;
generating an event date list by the court date server using the generated
10 event date; and
transmitting the event date list by the court date server to the user client
via the communications network.

69. The court date server of claim 68 wherein the user data further includes a user
15 electronic mail address for the user, the instructions further including:
getting the event date by the court date server from the user database;
getting the user electronic mail address by the court date server from the user
database;
generating a reminder electronic mail message by the court date server using the
20 event date; and
transmitting the reminder electronic mail message by the court date server to the
user via the communications network using the user electronic mail address.

70. The court date server of claim 68 wherein the user data further includes a user electronic
25 mail address for the user, the method further comprising:
receiving an updated court rule by the court date server;
getting the event date by the court date server from the user database;
generating an updated event date by the court date server using the event date and
the updated court rule;
30 generating a notification electronic mail message by the court date server using
the updated event date; and
transmitting the notification electronic mail message by the court date server to
the user via the communications network using the user electronic mail address.

35

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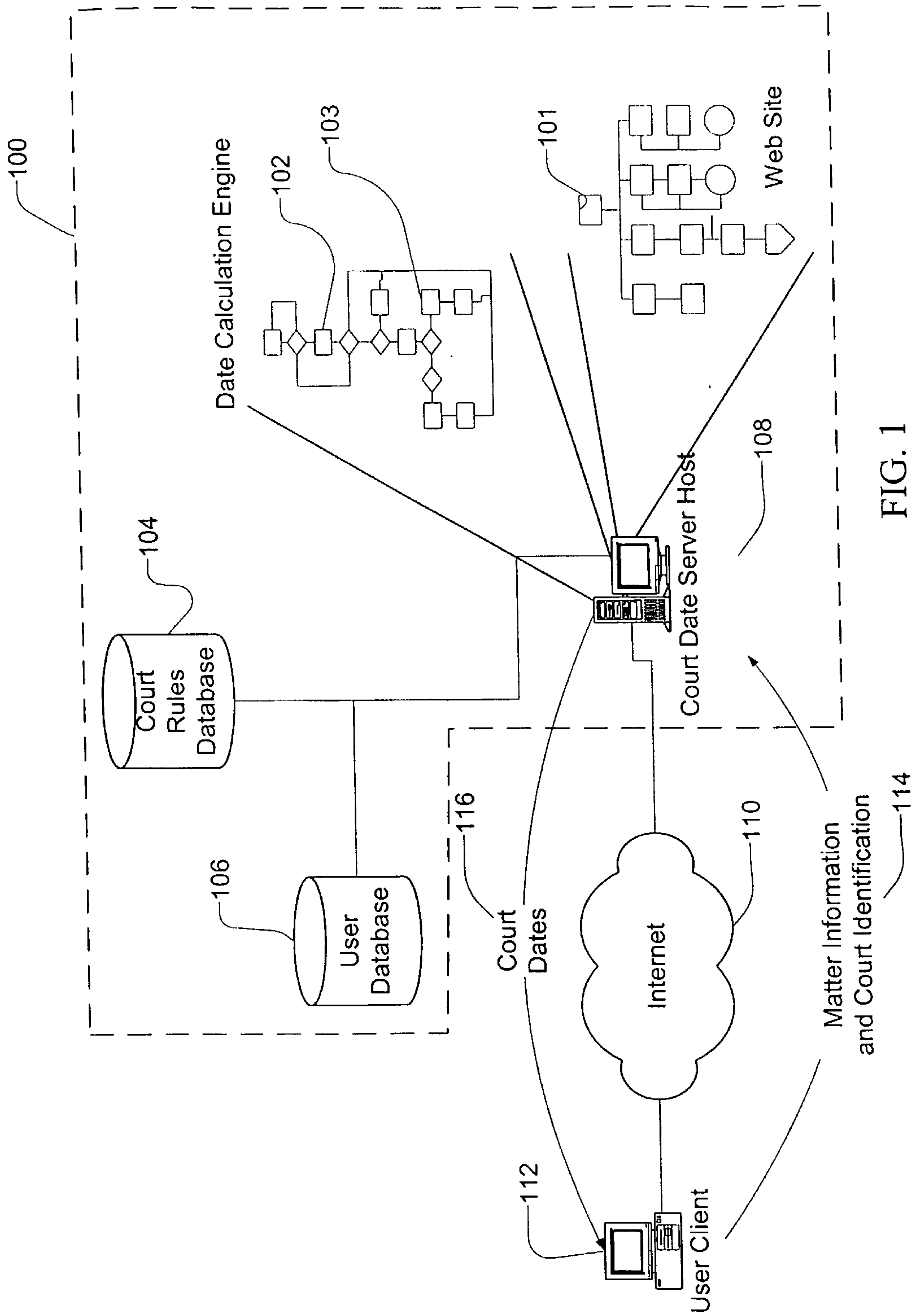


FIG. 1

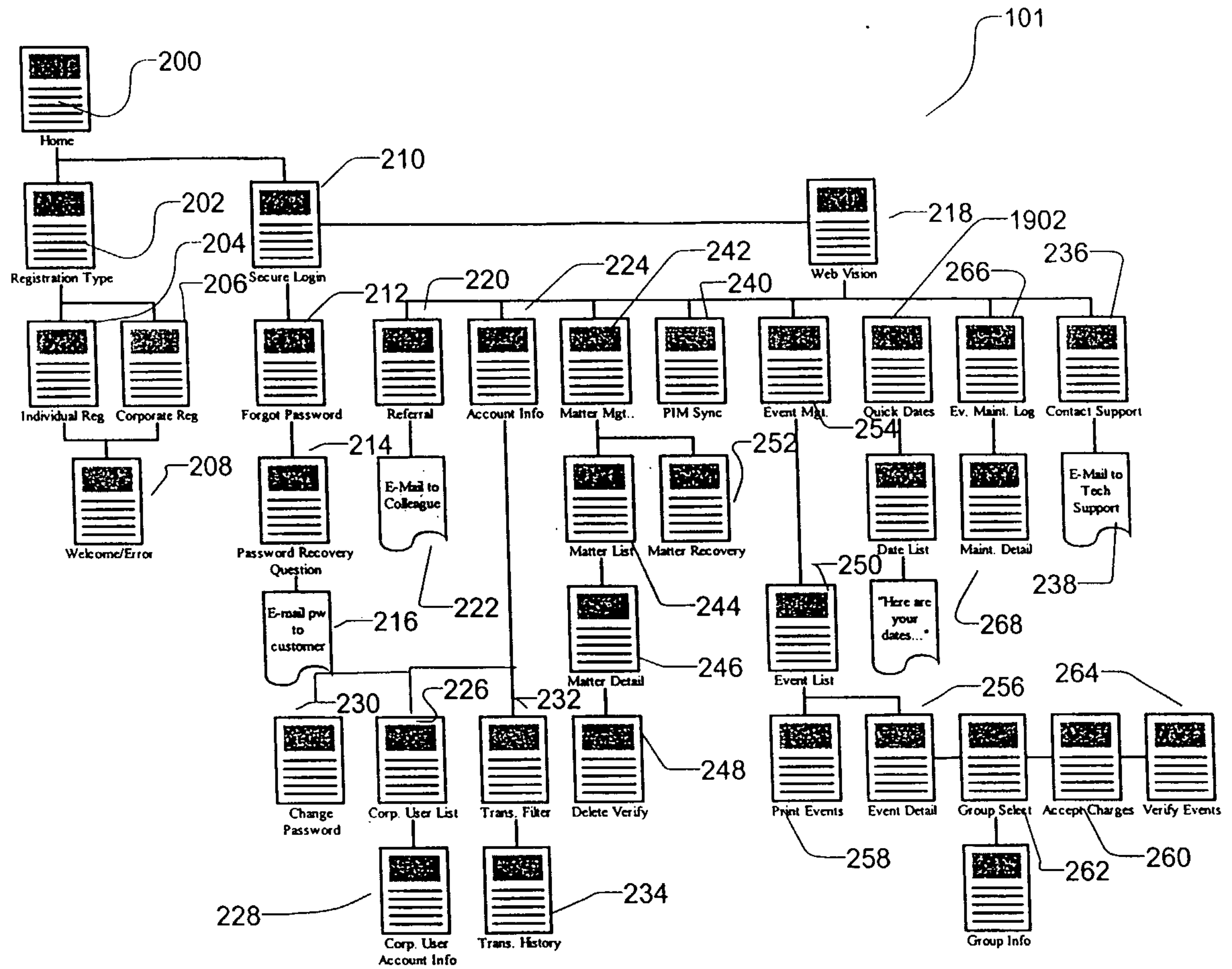


FIG. 2

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300

Individual Registration

Calendar Date Options

☒ Notify me when dates are changed? 302
Sometimes court rules are changed which may effect your calendared dates. Select this option is you want us to notify you if a rule change alters any of your calendared dates.

☒ Send me e-mail reminders of upcoming dates? 304
You can assign a reminder date to your calendared dates. Setting this option allows use to send you an e-mail reminding you of upcoming dates.

FIG. 3

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Matter Management

You have access to your matters from this page. Simply tell us what criteria to use to find the matter or matters you wish to find. Leave all filter fields blank if you wish to retrieve all your matters.

Filter Criteria

Search for matters by providing all or part of a matter name:

[Help](#) 400

☒ Matter names that begin with the specified text
☐ Matter names that contain the specified text 402
☐ Matter names that match the specified text exactly 404

Search for matters of a specific type:

[List](#) 406

Search for matters opened on a certain date or range of dates:

MM/DD/YYYY thru MM/DD/YYYY 408

Search for matters that have been closed on a certain date or range of dates:

MM/DD/YYYY thru MM/DD/YYYY 410

Set this option if you want to include matters that have been marked "Inactive":

☐ Include inactive matters? 412

How many matters per page would you like to show in the matter list?

10 414

416 418

FIG. 4

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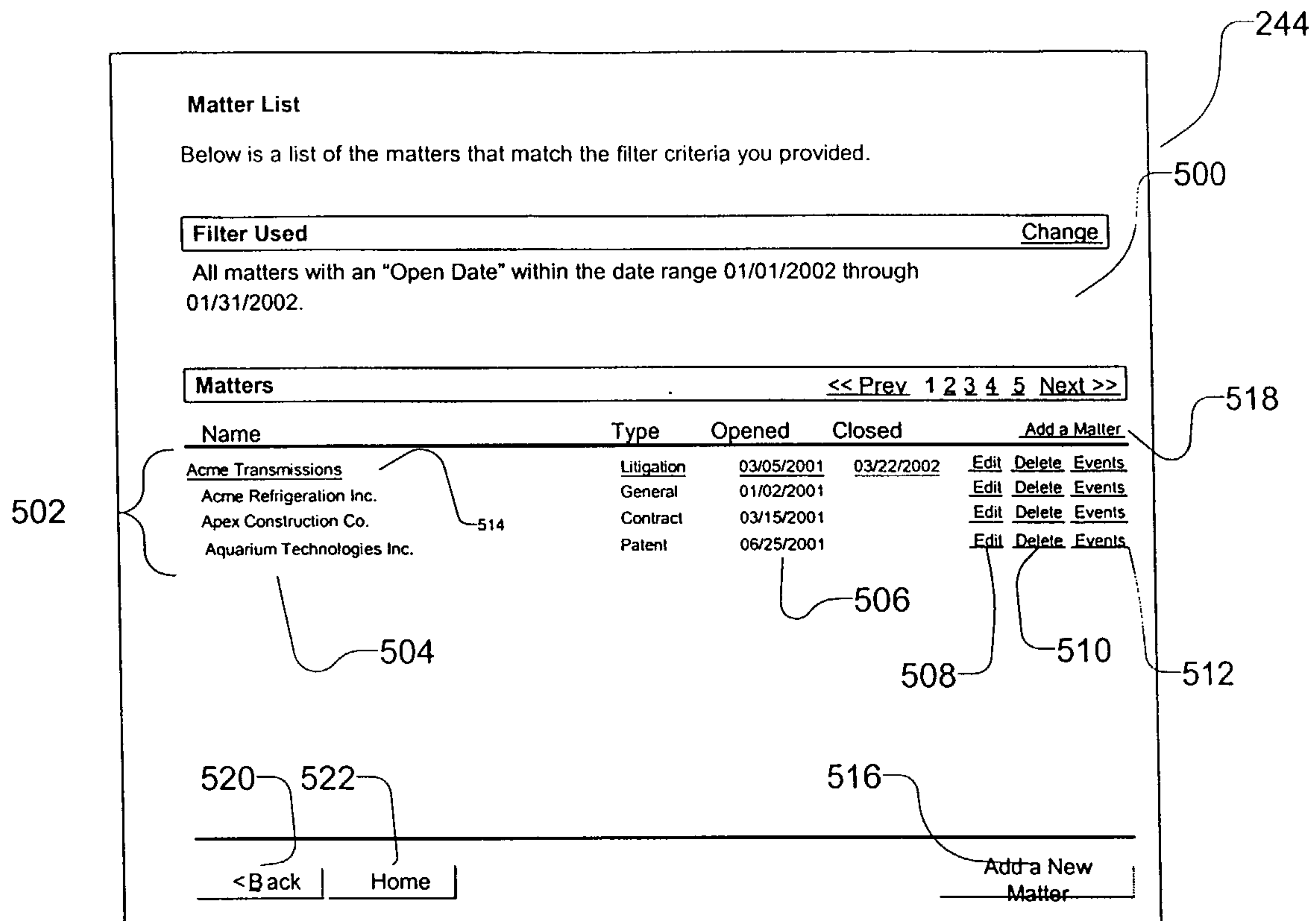


FIG. 5

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618

Matter Information

ID: 123456789

Enter information about a matter into the fields on this page. Click the "Submit" button when finished to save your changes.

Enter the name of the matter here: 602

Enter the Docket ID for the matter here: 606

You can assign a "type" to a matter which allows you to group like matters. Enter the "type" (up to 10 characters) or click "List" to select from list: 604

Enter the date the matter was opened here: 606

Enter the date the matter was closed here: 610

Select the default jurisdiction for this matter. The jurisdiction you provide here is used as the default jurisdiction when scheduling dates for this matter (you must use the "List" link to set this field): 612

Making a matter "Inactive" prevents you from accidentally adding new dates for the matter: 616

622

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624 620

FIG. 6

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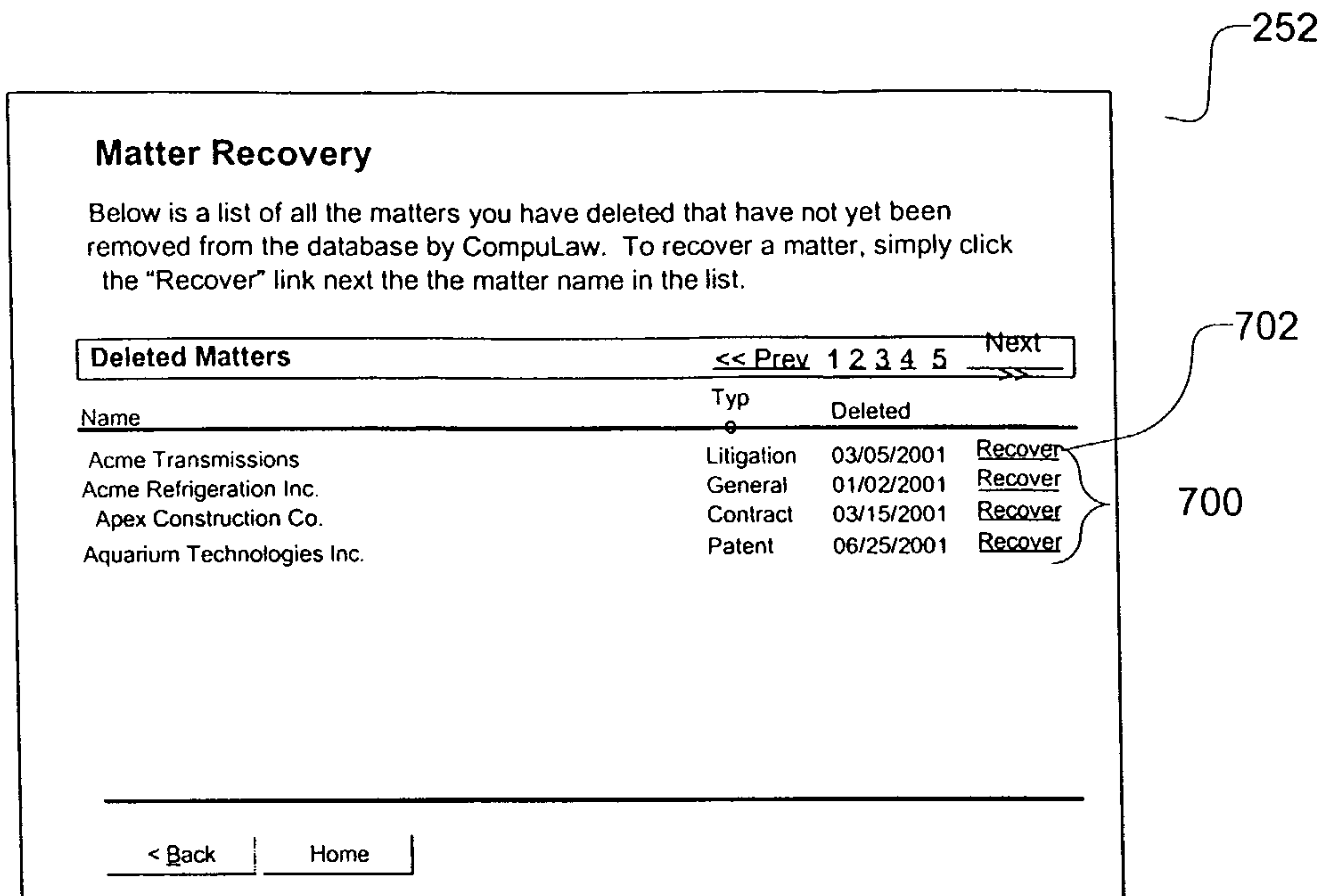


FIG. 7

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254

Event Management

You have access to all your court dates (events) from this page. Simply tell us what criteria to use to find the events you wish to see. You must provide information for at least one of the fields below.

Filter Criteria

Search for events by providing all or part of a matter name:

800 Beginning with ▾

804 List

Search for events whose due date falls within this range of dates and times:

806 MM/DD/YYYY at HH:MMap thru MM/DD/YYYY at HH:MMap

Search for events added within this range of dates and times:

810 MM/DD/YYYY at HH:MMap thru MM/DD/YYYY at HH:MMap

812 Search for events last changed within this range of dates and times:

MM/DD/YYYY at HH:MMap thru MM/DD/YYYY at HH:MMap

814 Search for a specific event using its unique ID:

816 Search for events that use a certain date calculation formula:

818 Search for events with a word or phrase in the formula description:

Beginning with ▾

822 Search for events with a word or phrase in the note field:

Beginning with ▾

826 ☐ Include completed events?

☐ Include deleted events?

How many events per page would you like to show in the event list?

828 10 ▾

830

832

< Back Find Add a New Event

802

820

824

FIG. 8

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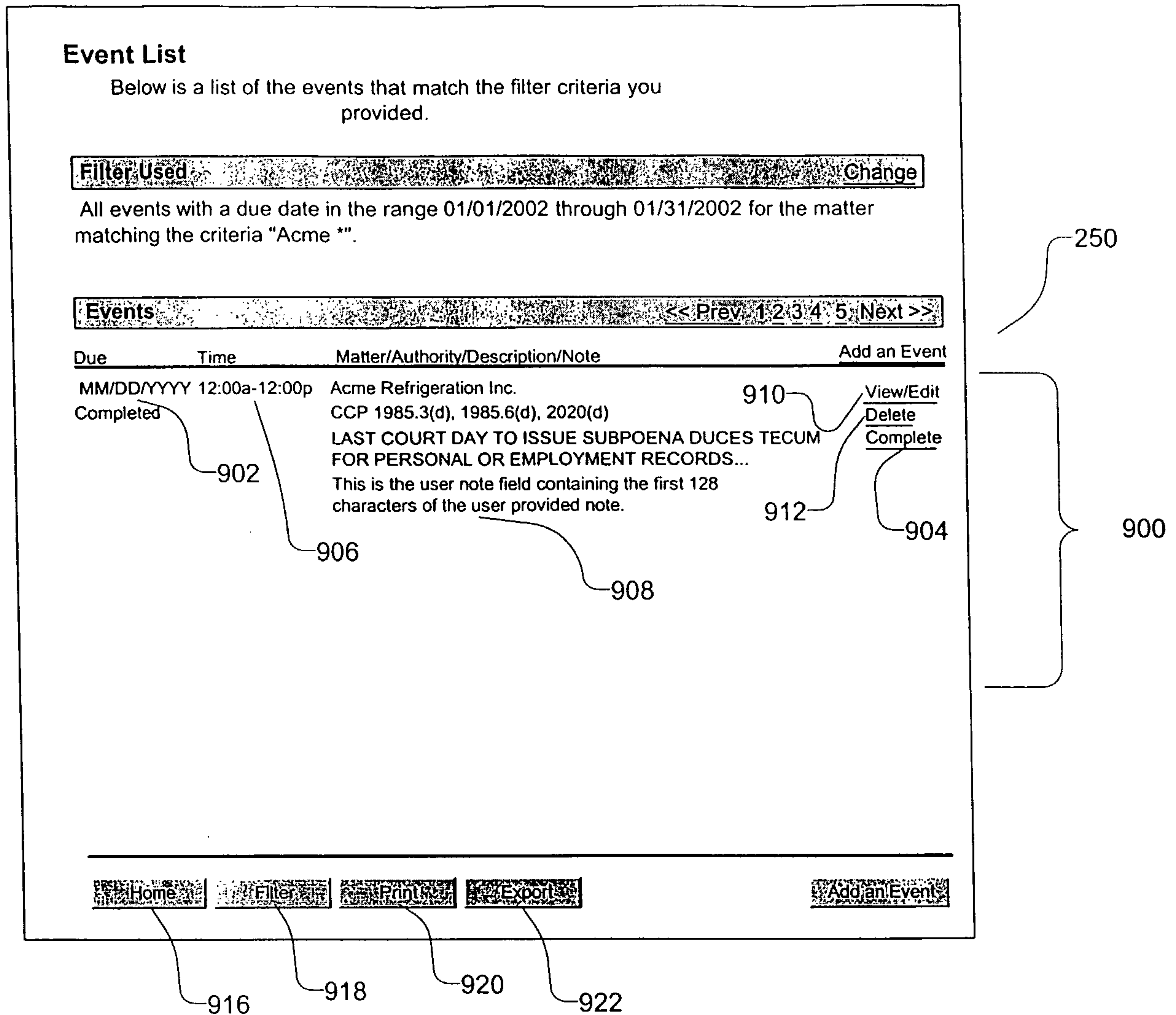


FIG. 9

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Add Court Dates
 Use this form to enter the information used to calculate the court dates for a particular deadline. Simply follow the steps below and click the "Submit" button when finished.

Date Information

Step 1: Select a matter for which the dates are to be scheduled. Click the "List" link next to the field for a list of available matters.

1004 _____ List 1002

Step 2: Select the jurisdiction in which the event is being scheduled. Click the "Expert" link next to the field for a list of available jurisdictions.

1008 _____ Expert 1006

Step 3: Select the event that you want to schedule. Click the "Expert" link next to the field for a list of available events for the jurisdiction you selected.

1012 _____ Expert 1010

Step 4: Enter the due date and time of the event using the two fields below. Click the button next to the field for a selection list.

1014 _____ 1018 Calendar 1016 Time 1020

Step 5: Use this field to enter the number of days before the event on which you wish receive a reminder e-mail.

1022 1024 to

Step 6: Enter a note that will be attached to this event.

1026

Step 7: Click the "Schedule" button to schedule your court dates. Click the "Cancel" button to cancel the scheduling process.

Schedule Cancel

1000 1030 1032

FIG. 10

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View/Edit Date

Use this form to enter the information CompuLaw needs to calculate the court dates for a particular deadline. Simply follow the steps below and click the "Submit" button when finished.

Audit Information

Record ID: 123456789 Formula ID: CA:LA-FT-96

Added by <user name> on <MM/DD/YYYY> at <HH:MMMap>
Changed by <user name> on <MM/DD/YYYY> at <HH:MMMap>

Date Information

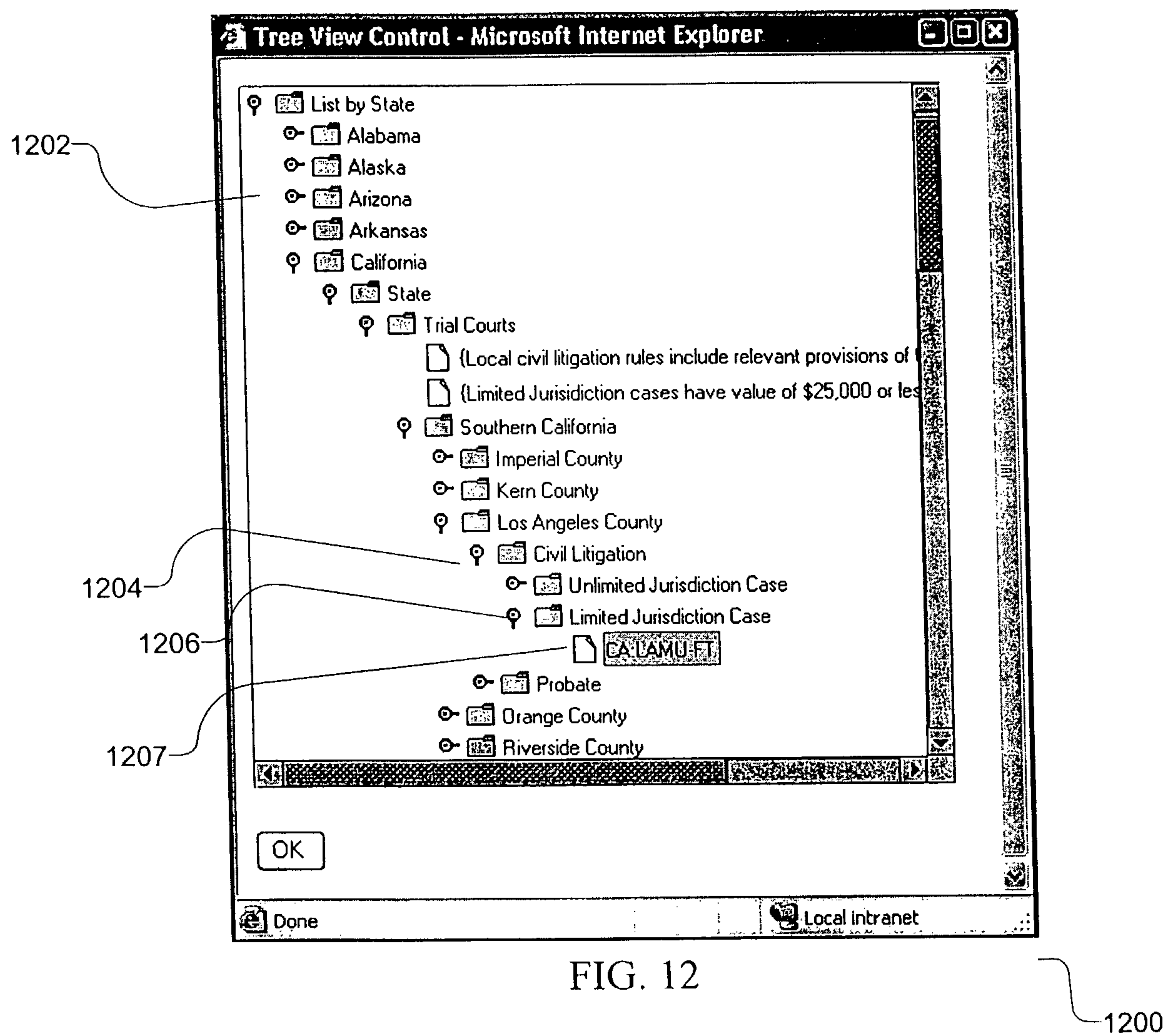
Matter name: Acme Refrigeration vs. Elmer Fudd
Jurisdiction: List by State->California->Southern->...
Event: Trial Date
Authority: The dates authority is shown here
Event description: The description of the formula used to schedule this date is shown here.
The formula description will most likely be multiple lines.

Due date: Calendar Complete
Time: Time Don't change
Reminder: ☐ (Reminder e-mail will be sent on MM/DD/YYYY)

This is the user provided note.

FIG. 11

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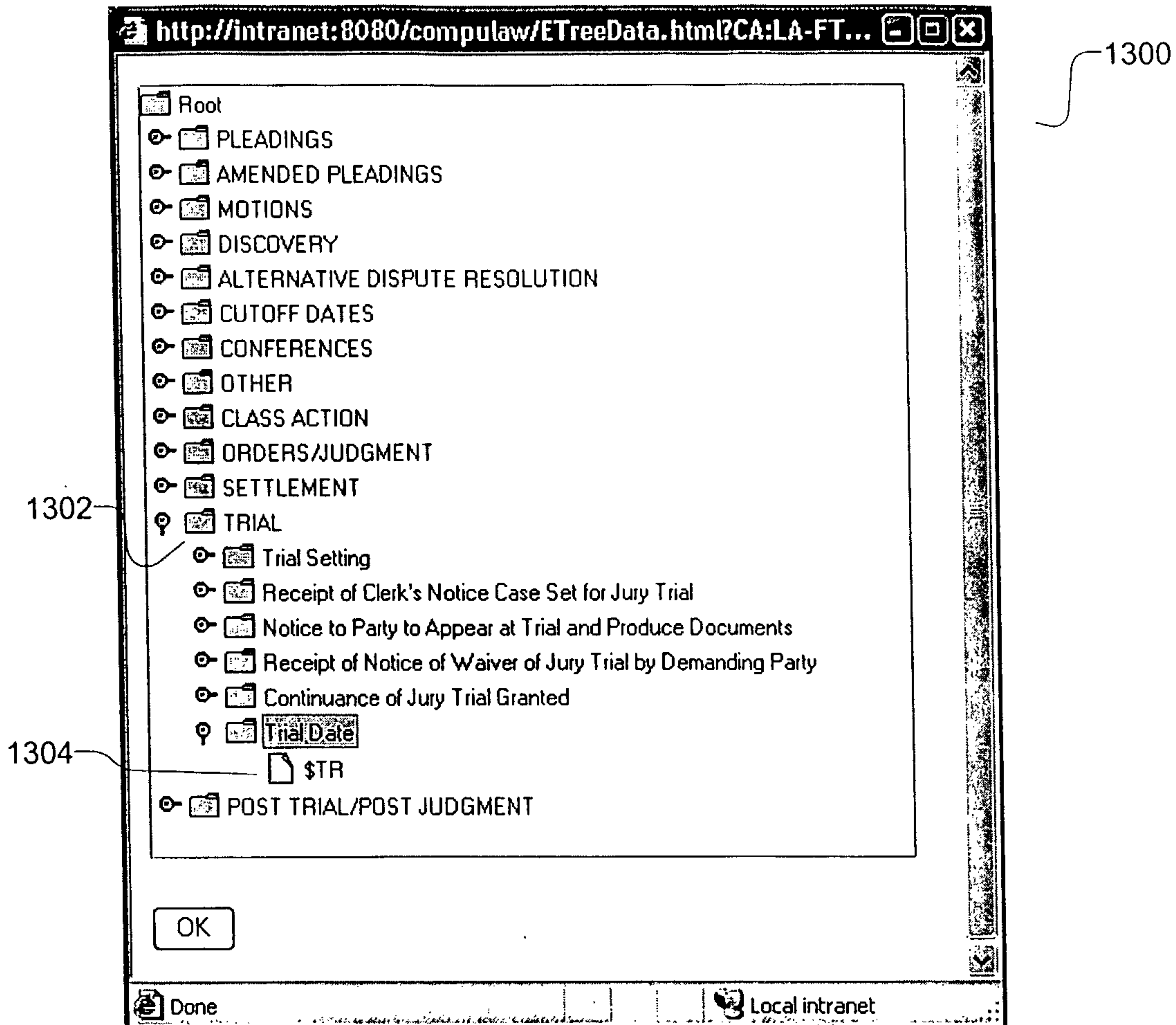


FIG. 13

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Date Generation Charges Varification

Below is a summary of the deadlines that you have selected for generation. 99 deadlines will be generated and your account will be charged \$999. Click "Submit" to generate the dates or "Cancel" to cancel the process.

--- Schedule Using --

Jurisdiction: Southern California->Los Angeles County->Civil Litigation->Limited Jurisdiction Case

Event: Settlement conference

Date: 03/27/2002 at 3:00pm

--- Billing Information --

of deadlines: 99
Charges: \$999

Clicking "Submit" bills your account then the list of dates is displayed. You will also be sent an e-mail containing the generated dates to the following e-mail address:

bobsmith@acme.com

Accept**Cancel**

FIG. 14

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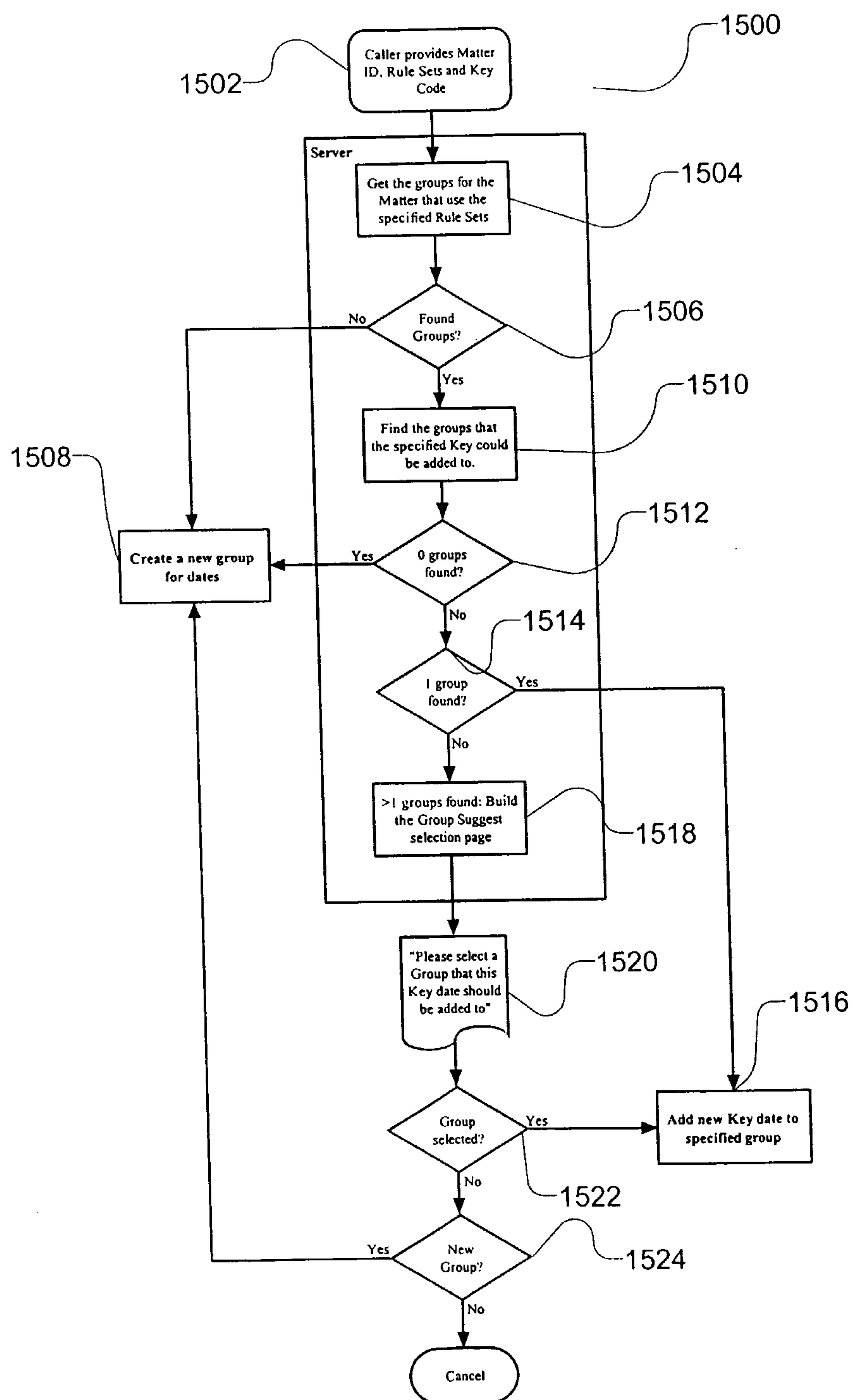


FIG. 15

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**Edit/Verify
Events**

Below are a list of the dates effected by the change or addition of dates for the matter.

General Information

Matter name: Acme Refrigeration vs. Elmer Fudd
Jurisdiction: List by State->California->Southern->...
Group ID: 1234567

Events << Prev 1 2 3 4 5 Next >>

A/C	Due	Time	Matter/Authority/Description/Note	
Added	MM/DD/ YYYY	12:00a-12:00p	Acme Refrigeration Inc. CCP 1985.3(d), 1985.6(d), 2020(d) LAST COURT DAY TO ISSUE SUBPOENA DUCES TECUM FOR PERSONAL OR EMPLOYMENT RECORDS... This is the user note field containing the first 128 characters of the user provided note.	Delete Note
Changed	MM/DD/ YYYY	12:00a-12:00p	Acme Refrigeration Inc. CCP 109.1(a) THE COMPULAW PROVIDED FORMULA DESCRIPTION WOULD BE SHOWN HERE. This is the user note field containing the first 128 characters of the user provided note.	Skip Note

Accept

Cancel

Print

1600

1604

1606

1602

1612

1608

1610

FIG. 16

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Event Maintenance Log

This list contains the log entries made by our Event Maintenance process for any changes made to any of your dates. To see the detail of the changes made, click the "Details" link next to the log entry.

Log Entries << Prev 1 2 3 4 5 Next >>

Notified on	Notifications	Log ID	Changes	Confirmed?	
MM/DD/YYYY at HH:MMap	9	999999999	99	Yes No	Details
MM/DD/YYYY at HH:MMap	9	999999999	99	Yes No	Details
MM/DD/YYYY at HH:MMap	9	999999999	99	Yes No	Details
MM/DD/YYYY at HH:MMap	9	999999999	99	Yes No	Details
MM/DD/YYYY at HH:MMap	9	999999999	99	Yes No	Details
MM/DD/YYYY at HH:MMap	9	999999999	99	Yes No	Details
MM/DD/YYYY at HH:MMap	9	999999999	99	Yes No	Details

1702 1704 1706 1708 1710 1712

266 1700

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FIG. 17

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Event Maintenance

Detail

Below is a list of the changes made by an Event Maintenance to your dates for log entry

999999999. 1800

Detail << Prev 1 2 3 4 5 Next >>

Event ID	Changes
999999999	Date changed from MM/DD/YYYY to MM/DD/YYYY 1802
999999999	Time changed from HH:MMap to HH:MMap
999999999	The formula description has been changed.
999999999	Unable to change date because the date was changed form its originally calculated date. 1804

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FIG. 18

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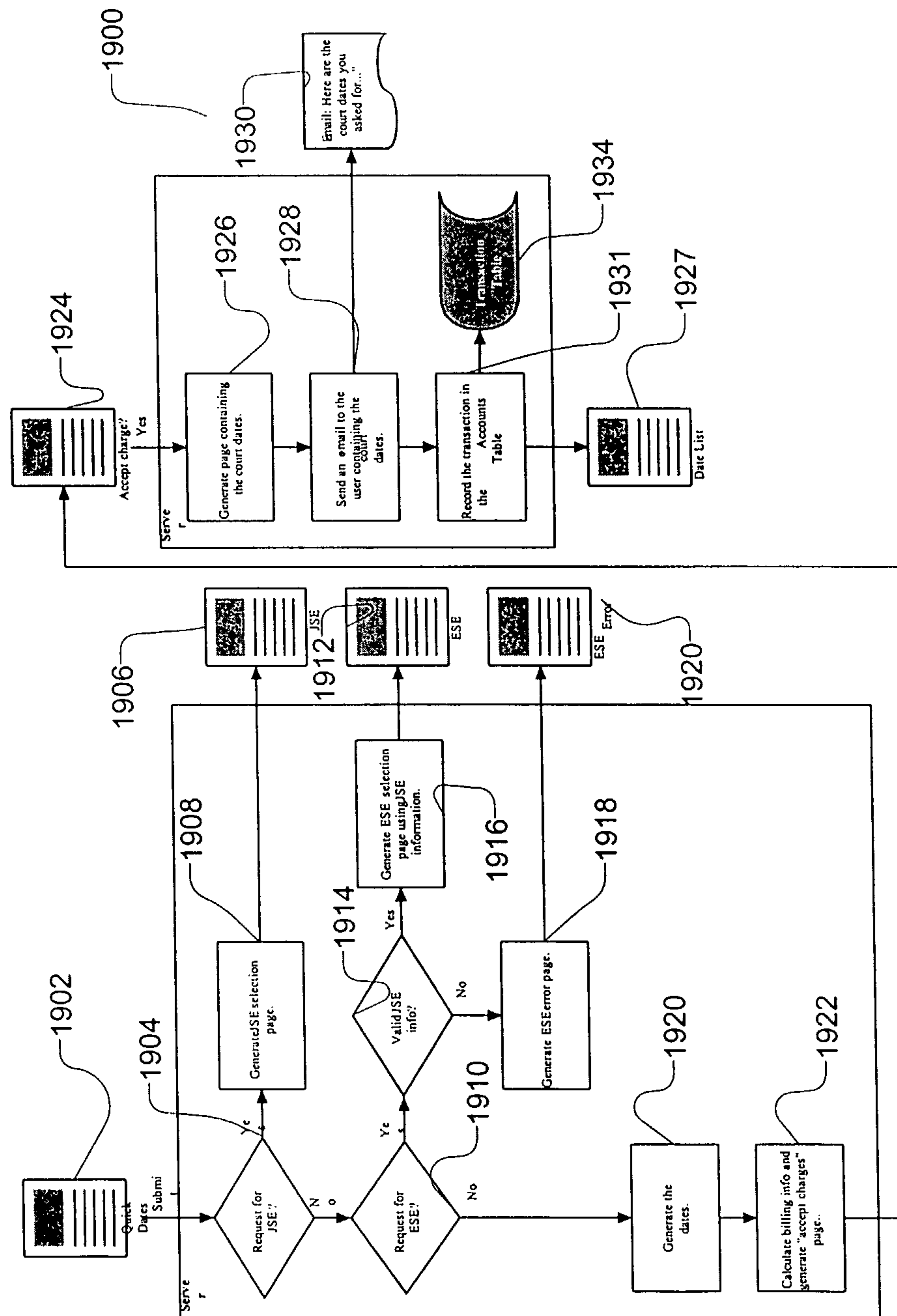


FIG. 19

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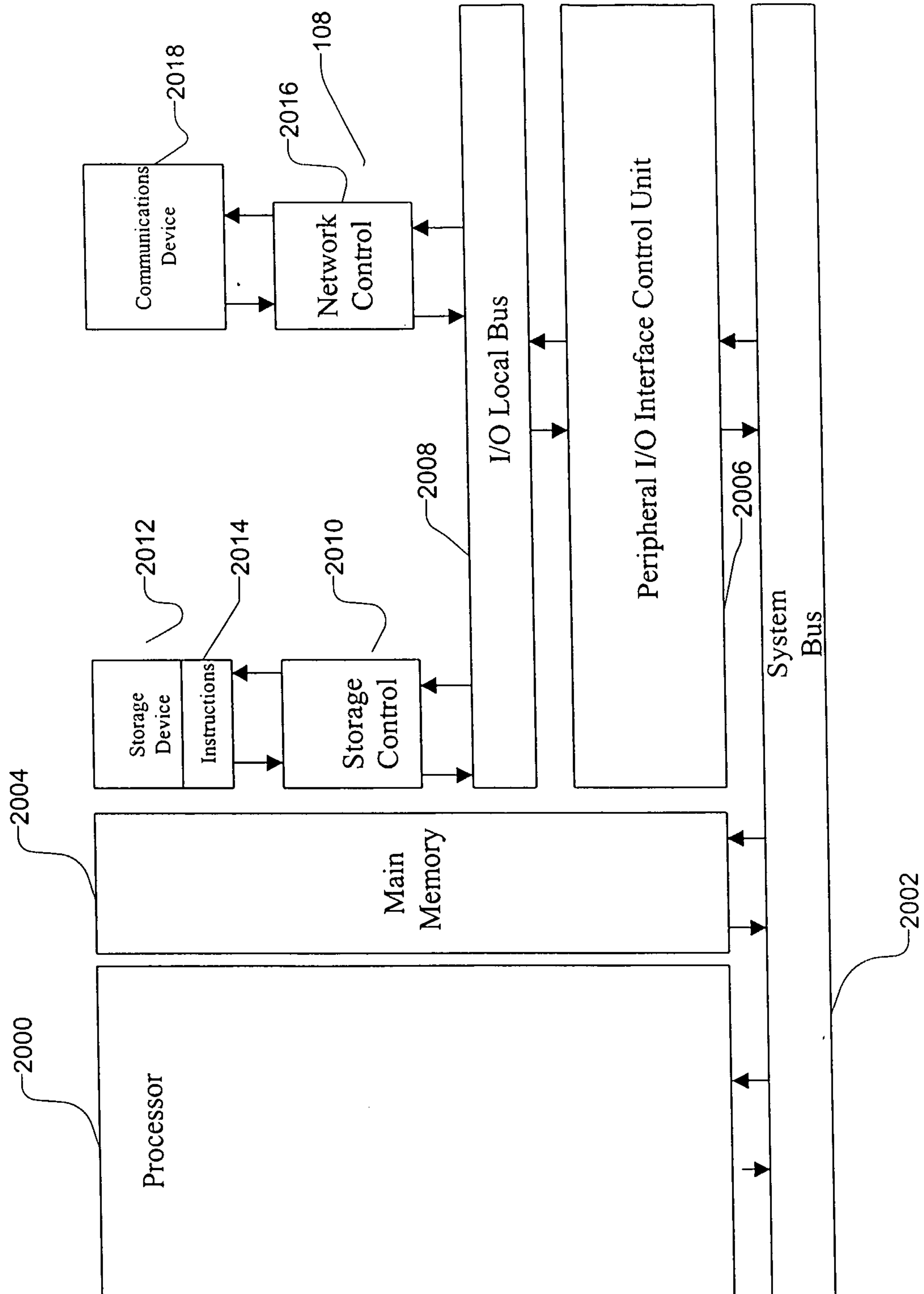


FIG. 20

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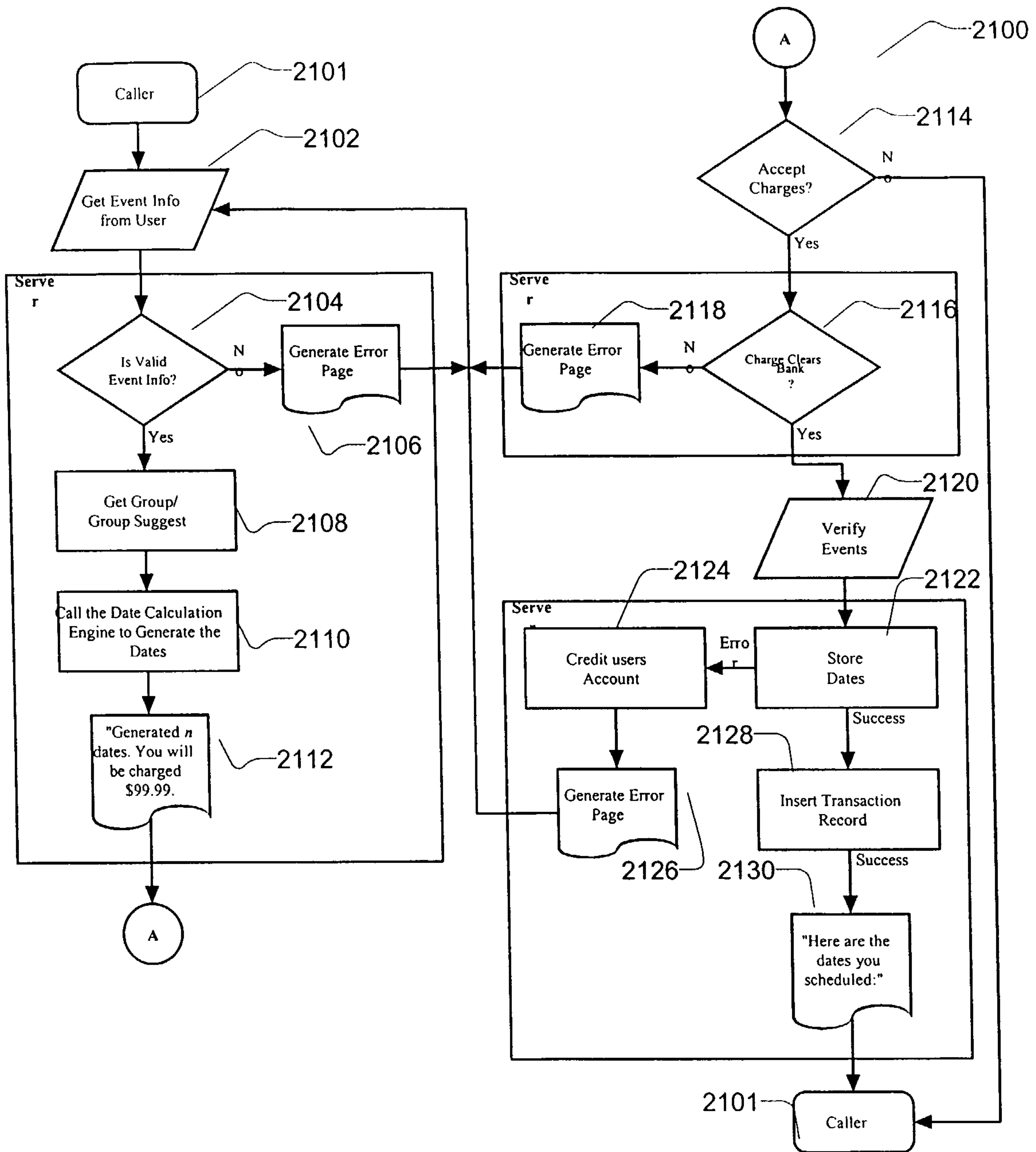


FIG. 21

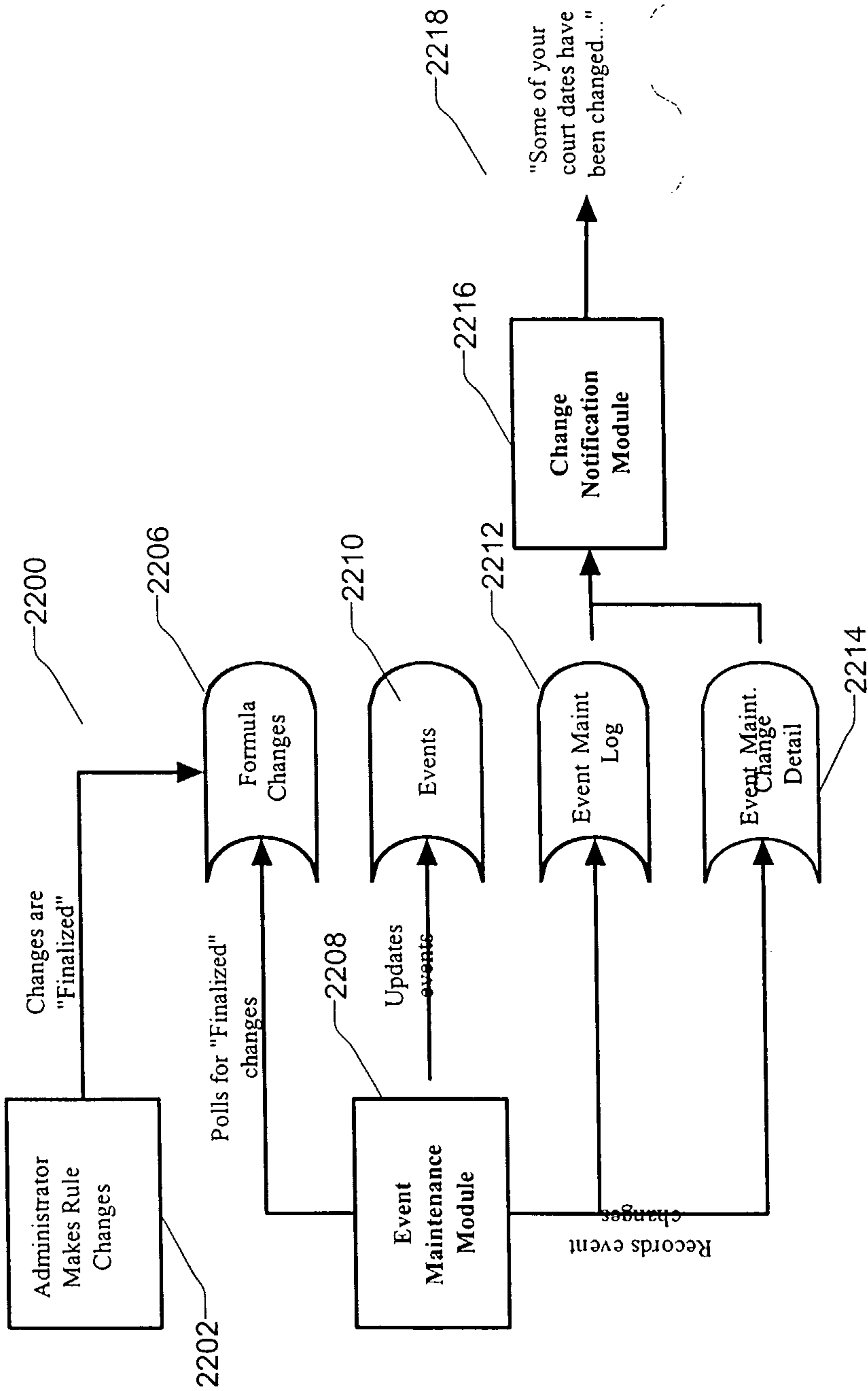
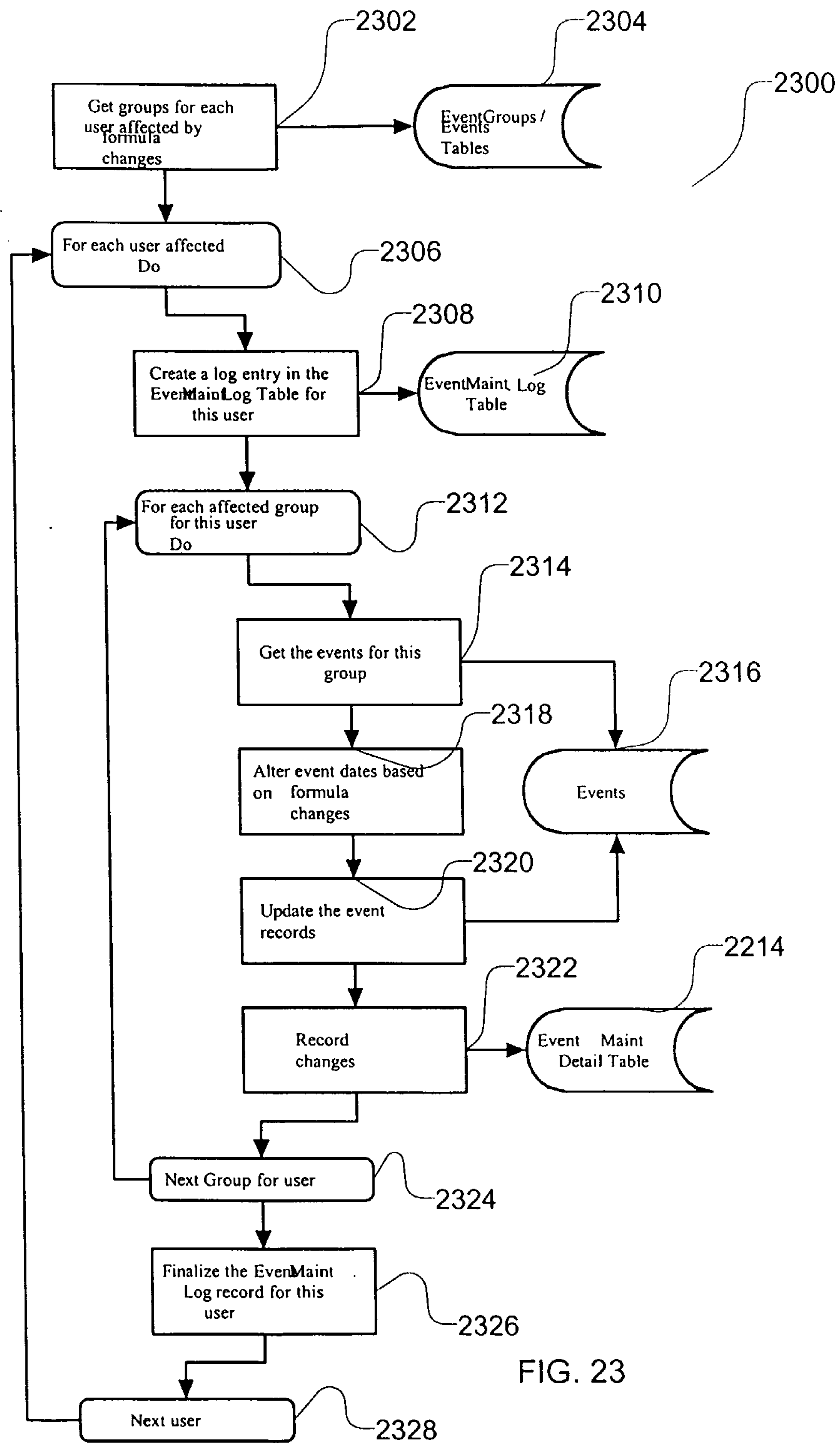


FIG. 22

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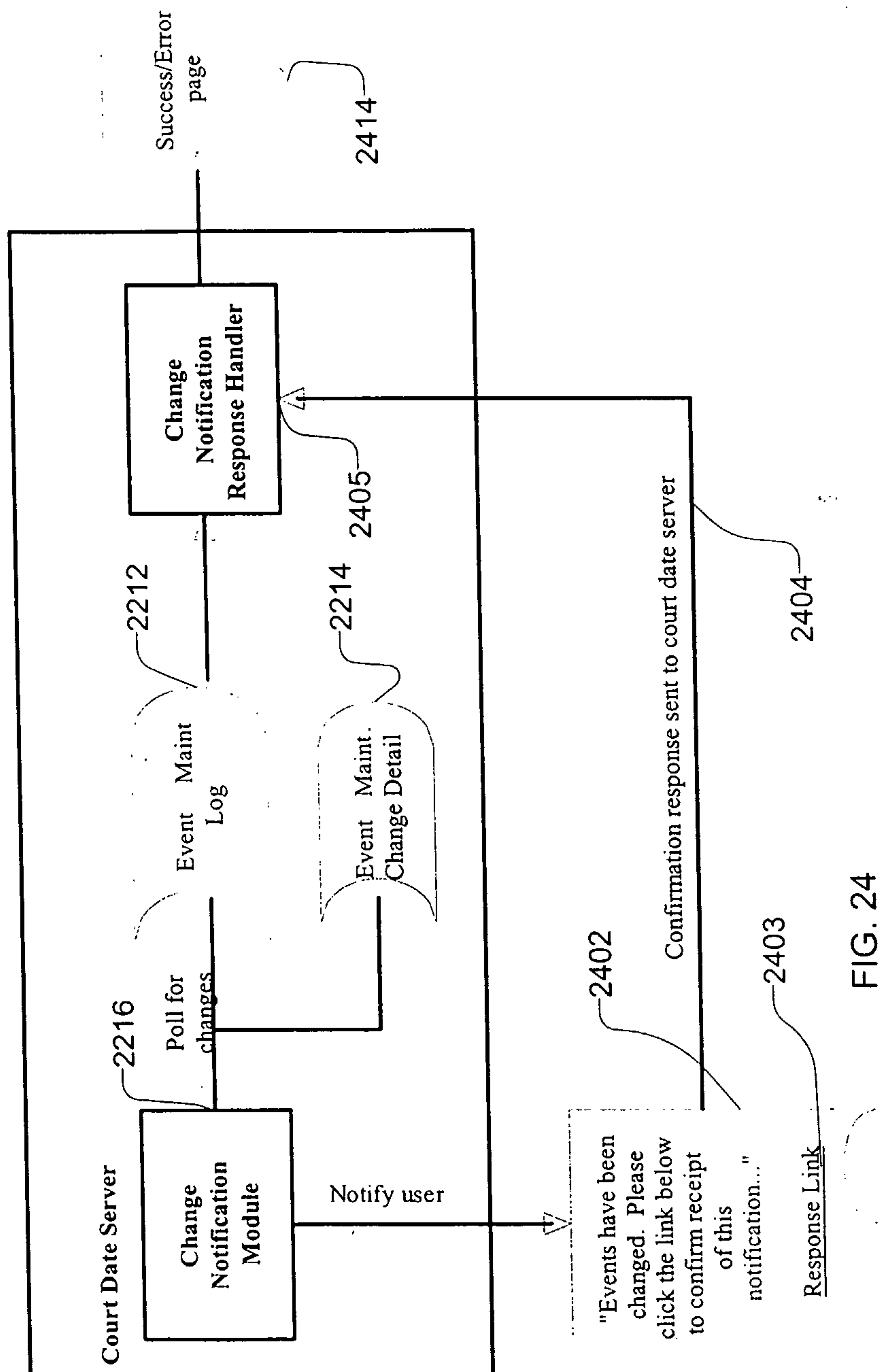


FIG. 24

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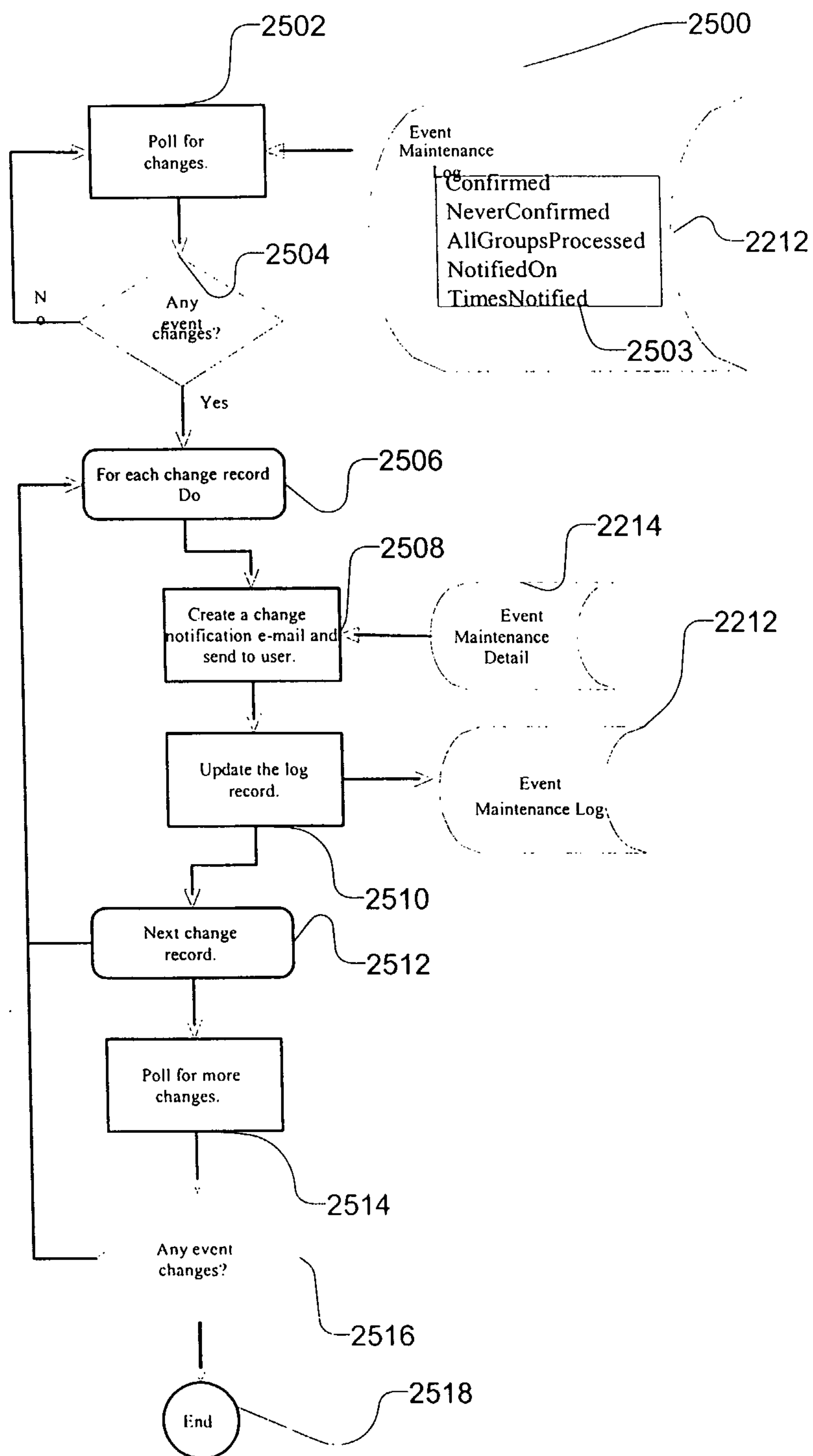
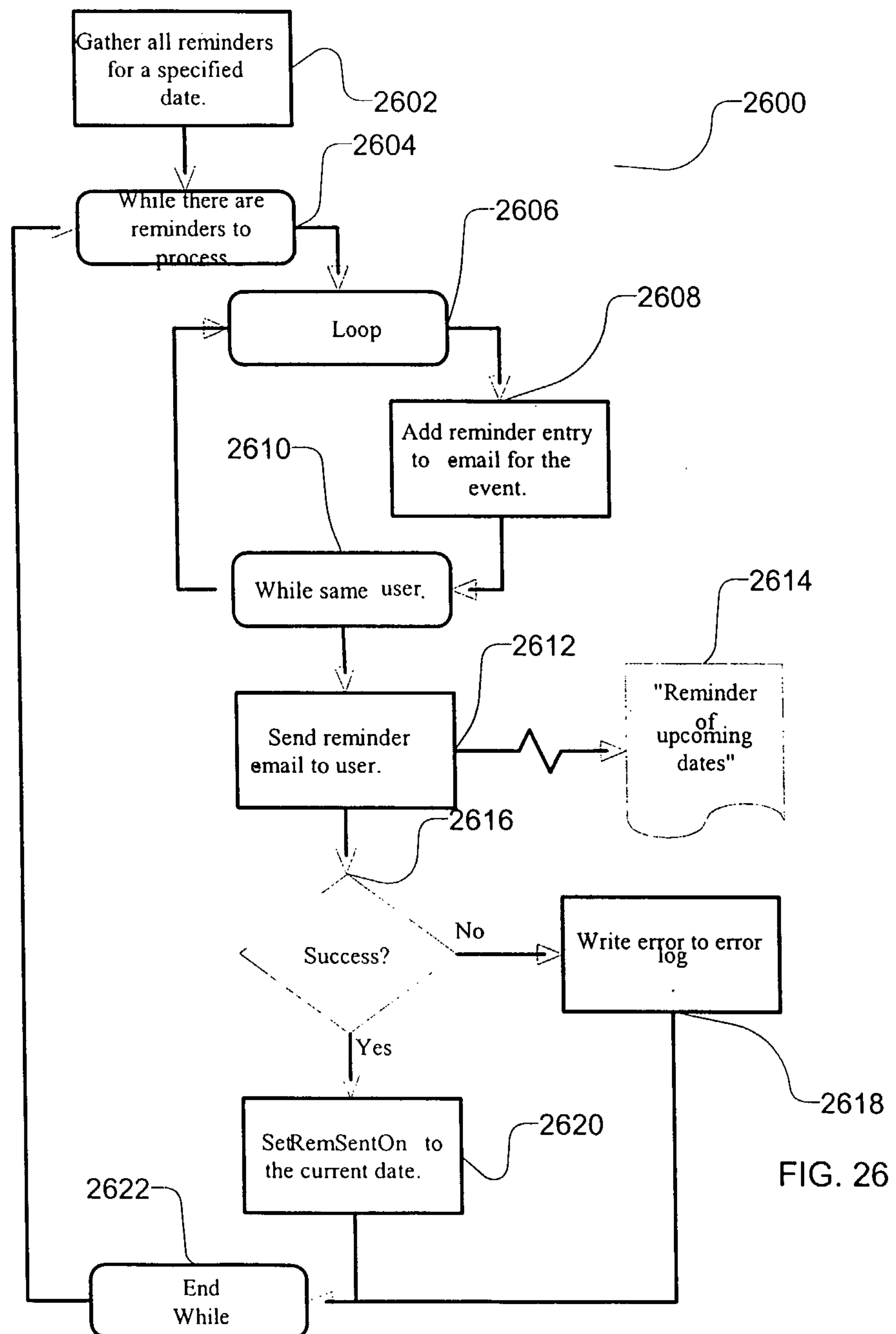


FIG. 25

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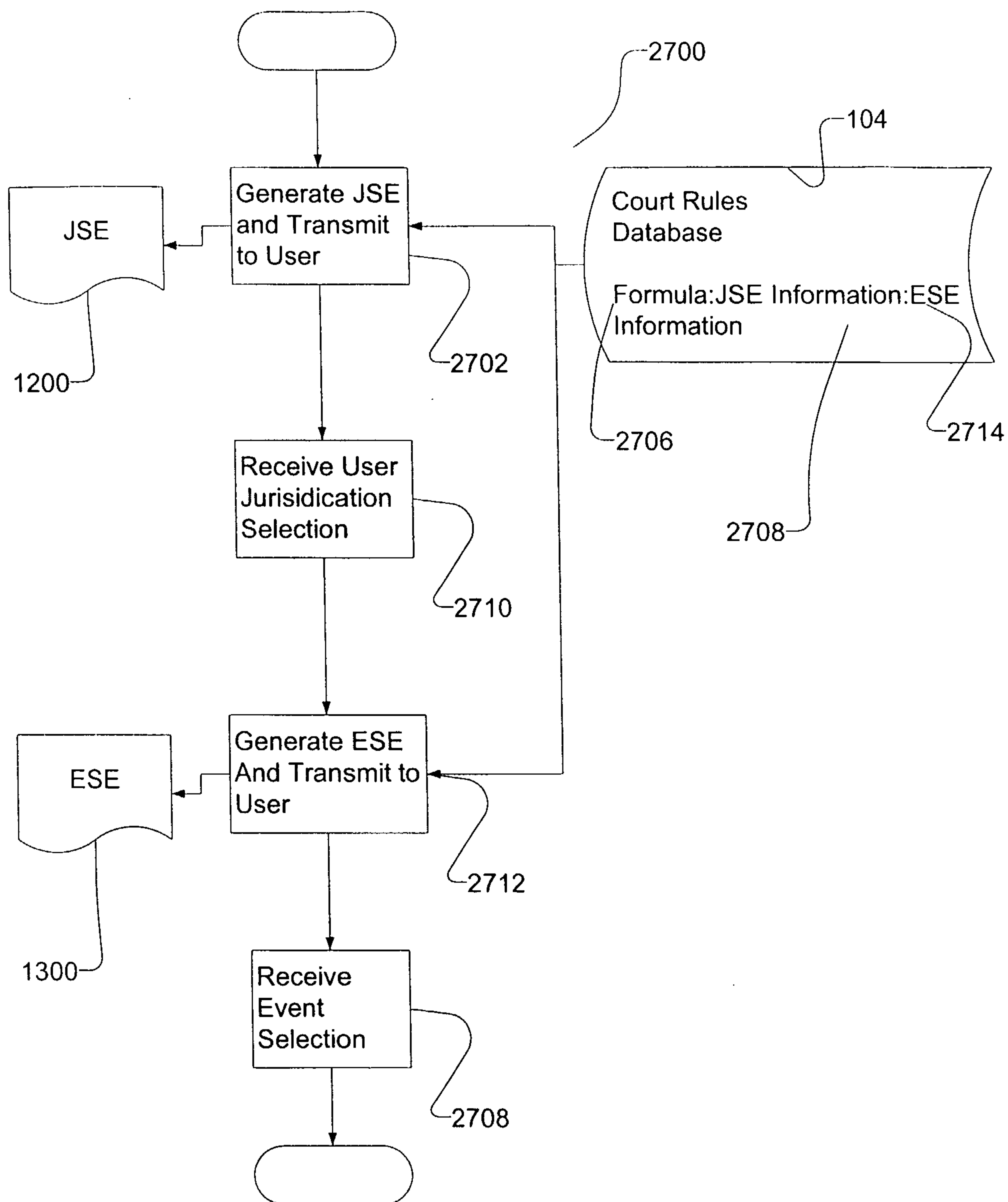


FIG. 27

