**Configuration:**

Name: CAO Case Management System

New Environment: SharePoint /Power Apps

Mapping:

1. Retain the current Macroview Client Library structure.
2. Retain the current Macroview creation of a new Assignment Document Set Card structure.

**\*Adding in the staff initials tags feature (e.g.; DGA – Donnie G. Autry).**

**\*Multiple priority levels tags for assignments.**

1. Retain the use/automated functionalities of CAO Intake form.
2. Automated number assignment that reset at the beginning of each year.

Standard Format: (e.g., 2026-CAO-001) – use for Litigation and Non-Litigation files.

(e.g., 2026-BR-001) – use of Board Report Tracking.

**\*We would like the ability to manually open sequential case numbers (e.g. CAO2026-001-01)\***

1. New assignment Automatic folder template:
2. E.g., Litigation

* Case Notes
* Correspondence
* Drafts
* Pleadings
* Discovery
* Transcripts
* Research

1. E.g.: Non Litigation

* Case Notes
* Correspondence
* Drafts
* Research

1. E.g.: Board Reports

* Drafts
* Final Report

1. Retain the ability to add subfolders in assignment files.
2. Drag & Drop outlook, pdf’s, Excel, Word functionality.
3. Ability to share selected documents with other county staff for drafting purposes.

**Search capabilities:**

1. Assignment Dashboard that allows users to view their assignments as well as those of other team members.

Columns: Assignment Title, Managed By, Type of Assignment, Due date, Favorite tag option.

**Notification capabilities:**

1. Automatic reminders for open or unstarted assignments.

**Reporting:**

Capability to produce and export data on when assignments were opened and closed, with the option to export it in excel.

**What we’d like to avoid:**

1. No Check In/Check Out feature.
2. Eliminate the multiple versions saved feature.