

# TAMES UPDATE

January 2, 2008

TAMES  
TEXAS APPEALS MANAGEMENT AND EFILEING  
SYSTEM  
TEXAS OFFICE OF COURT ADMINISTRATION

Volume 1, Issue 1

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## STEERING COMMITTEE'S CHARGE:

- PERFORM PERIODIC REVIEWS OF THE PROJECT
- PRIORITIZE EMERGENT ISSUES THAT FORCE CHANGES TO BE CONSIDERED, ENSURING THAT SCOPE ALIGNS WITH THE AGREED BUSINESS REQUIREMENTS
- RESOLVE CONFLICTS AND DISPUTES OVER PROJECT CONTENT, RECONCILING DIFFERENCES OF OPINION AND APPROACH AMONG STAKEHOLDERS;
- PROVIDE OUTREACH ASSISTANCE TO THE PROJECT WHEN REQUIRED;
- FINAL ACCEPTANCE THAT PROJECT DELIVERABLES MEET THE AGREED STAKEHOLDER REQUIREMENTS.

## TAMES Project Kick-Off

The TAMES project had two successful kickoff meetings in November. The full steering committee met on November 14th, and the project team met on the 19th.

At the steering committee meeting, Chief Justice Hedges provided the group with her insights about the project, and reiterated that this is a transformational project for the courts.

Bruce Hermes, OCA's Information Technology Director reinforced the steering committee's charge, and distributed copies of the steering committee's charter and business case.

The project's contracted

technical lead, Anthony Gatlin, spoke about the team composition, development tools and proc-



STEERING COMMITTEE  
CHAIR, CHIEF JUSTICE  
ADELE HEDGES

esses. He introduced the concept of agile application development (see more information on this on page 3.)

The following week, at the project team kickoff,

Bruce spoke about the importance of the project, its impact on court operations and its role in improving OCA's ability to support the courts' technology needs.

Anthony described the development tools and processes in depth, giving the team a preview of the coming months' work.

## Everyone Has a Role

Expect to see many questions about the way each appellate court operates.

The project team plans to do a "baseline" survey to gather opinions of the current case management system. This will help to identify the areas where operations should remain familiar, and where new approaches are needed to best support the work of

each court.

During the course of the project, team members will ask many questions, and we'll ask each court to respond. Because no two courts do their work *exactly* alike, the team needs to check in with representatives of each court to be sure that we understand how that court operates.

Please make time to respond to TAMES project-related email and surveys or meet with team members in face-to-face visits. The more the team learns about the courts' processes, the better the final product.

## Harris County Circulation System

The Houston appellate courts recognized a need to streamline the way collaborative writing and decision-making occurs within the courts.

Harris County graciously agreed to work with them to develop a circulation system – an automated means to circulate documents through the courts. Further, Harris County made the software available to the Texas appellate courts through an agreement with OCA. We plan to use and adapt the system for use within TAMES.

The circulation system enforces certain rules the courts have put into place. These rules could cover who's authorized to see or edit a document, who can and must vote, when votes are due, etc.

Even though the two courts currently using the system work a bit differently from one another, they use the same system. The system allows for each court to implement its own rules.

The project team has only seen the circulation process

at two courts so far. From this review, we understand that each court has an approach that works for them. For the circulation system to be effective, we have to make the system adaptable enough to handle all of the different rules, and to change when the courts try a new approach.

In this area, we will call on chambers staff to provide information so we can create an accurate picture of the needs across the state.



DESIGN IS DIRECTED AT HUMAN BEINGS. TO DESIGN IS TO SOLVE HUMAN PROBLEMS BY IDENTIFYING THEM AND EXECUTING THE BEST SOLUTION.

–IVAN CHERMAYEFF



## Site Visits and Collaboration

Blake Hawthorne is not only the vice-chair of the steering committee, but a key subject matter expert. His participation in two key meetings has been particularly valuable.

We arranged to meet with experts in imaging systems to discuss the specific needs and concerns of the courts. As we bring in electronic documents through e-filing, we need to have an efficient way to make the remaining paper documents available on line as well. Blake, and Jeff Kyle of the Third Court of Appeals described their paper flow and the special challenges posed by certain types of documents and formats.

Blake and Nadine Schneider participated in the visit to the Harris County appellate courts to see the circulation system in action. Because the Supreme Court has its own specialized version of a circulation system in place, it's important to see the similarities and differences.

Several appellate court clerks were in Austin recently on business. They were able to visit the Travis County District courts with project team members. Our goal was to better understand what's happening at the trial courts, and how that may translate into features for TAMES.



Blake Hawthorne,  
Clerk of the Supreme  
Court  
Steering Committee  
Vice-chair

## TAMES Goals

The idea for TAMES was sparked by the awareness that appellate courts will see an increasing pressure to accept electronic documents. As trial courts embrace e-filing, it is just a matter of time before electronic documents reach the appellate courts in large numbers.

It's not enough to accept electronic documents. The

courts need a way to efficiently and effectively use those documents. TAMES goals encompass both the idea of accepting electronic documents and making the most of them once received.

TAMES project goals are:

- Maintain and improve the current case management capabilities for clerks' office

operations and the public web access features

- Add features that facilitate the flow of information through and among the chambers staff, routing draft documents, collecting comments and approvals and maintaining document versions
- Create the ability to

accept e-filed documents sent by attorneys through TexasOnline, and to accept electronic documents provided directly by trial courts and court reporters

- Improve supportability by OCA staff through the use of a browser-based interface and currently supported technology

# TEXAS APPEALS MANAGEMENT AND eFILING SYSTEM

## Agile Development – What is it?

TAMES  
Texas Appeals Management and eFiling System  
Texas Office of Court Administration

205 W. 14th Street, Suit 600  
Austin, TX 78701

### Steering Committee

Chief Justice Adele Hedges, 14th  
Court of Appeals (Chair)

Blake Hawthorne, Clerk, Supreme  
Court (Vice-chair)

Presiding Judge Sharon Keller, Court  
of Criminal Appeals

Justice Paul Green, Supreme Court

Chief Justice Brian Quinn, 7th Court  
of Appeals

Ed Wells, Clerk, 14th Court of Ap-  
peals

Louise Pearson, Clerk, Court of  
Criminal Appeals

Jeff Kyle, Clerk, 3rd Court of Appeals

Carl Reynolds, Administrative Direc-  
tor, Office of Court Administration

Bruce Hermes, Director of Informa-  
tion Services, Office of Court Admini-  
stration

Judge John Dietz, 250th District  
Court

Amalia Rodriguez-Mendoza, District  
Court Clerk, Travis County District  
Courts

Peter Vogel, Judicial Committee on  
Information Technology

Judy Miller, Official Court Reporter

The TAMES project team will use agile development principles. What does that really mean to the team? And, what does that mean to the people who will use the software when it's ready?

The keyword for Agile development is "iterative". Software is developed in cycles, each an iteration. Each cycle's result is completed software, though not every cycle can be released for use in production all by itself. However, even if the software from one cycle cannot stand completely alone, it is working software. It can be reviewed and evaluated by the planned users of the software, and incorporated easily into the bigger picture.

The value to the developers is that they have an easily-understood, manageable task in front of themselves for each iteration. They will have a successfully completed part of the software at the end of the cycle.

The value to users is that software is delivered early, continuously and in working order. It allows every interested person to see results and examine the products as they're available.

## Project Status

The project team is in place. We've contracted for a technical lead, and filled the two new staff positions associated with this project.

Members of the project team have met with important partners for the project. Several team members visited Houston twice to gain an understanding of the opinion circulation system. They met with Harris County developers for a technical briefing. They returned to meet with court staff for a demonstration of the software, and a discussion of how the business of circulation really happens.

Project team members also met with representatives of Bearing Point to better understand how e-filing works at the trial court level. After that meeting, we were treated to a visit to the Travis County courthouse. Amalia Rodriguez-Mendoza, the District Clerk, hosted a large group that included project team members and several appellate clerks. This group was able to see how e-filing and a sophisticated imaging system combine to create efficiencies for Travis County's district court.

The project is currently focused on developing use cases to describe the activities that exist within case management now. They've identified 332 use cases that must be developed, and are at work writing each one. Over 125 use cases have been written so far.

Team training is under way. The first order of business is to make sure that all team members are up to speed on basic court business rules and current case management. Bill Carlson and Angie Medina lead these sessions. Technical training will gear up by the first of the year, with a mix of in-house, self-study and vendor-provided training.

One of our team members is doing a close review of the databases for the current case management systems. This information will help us as we consider changes to the system. We know that the database will have to be changed somewhat so that it will accommodate new information that the courts may wish to collect, and to manage the influx of electronic documents that we expect to receive with e-filing.

We still expect to add contracted employees to fill out the project team. Interviews will begin in early January.