

Click on **REPORTS** on the TrialWorks Menu Bar

The Report menu will drop down:

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• Select CUSTOM REPORT EXPORT

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# Click EDIT QUERIES

**FOR EXAMPLE:** To create a Report showing the case name, file number and referral attorney for all your open TVM Cases but only if there is a referral attorney. Your Query should appear as follows:

The Advanced Filter window will appear:

Bal Advanced Filter     23       Query/Filter Name:     TVM       TVM     Rename Query   Duplicate Query								
Z	QueryName -	TableName 🚽	FieldName 🚽	Condition +	Value 🚽			
	TVM	CaseTable	Referral Atty	SHOW				
	TVM	CaseTable	SubLiability	=	"TVM"			
	TVM	CaseTable	File #	SHOW				
	TVM	CaseTable	Referral Atty					
	TVM	CaseTable	Case Status	=	2			
	TVM	CaseTable	Case Name	SHOW				
*	TVM			=				
Re	cord: 🛛 🔸 7 of 1	7 🔹 🕨 🛤 🧏 Ҡ No Filter	Search					
		Clear F	ilters					

Name your query in the **QUERY/FILTER NAME** field according to what the report will be titled. For Example: "TVM"

The query name will automatically fill in for each line of your query:

Tr	alWorks™	
CASET	MANAGEMENT SOFTWARE	
	Advanced Filter	23
	Query/Filter Name: TVM 💌 Rename Query Duplicate Query	
	QueryName     TableName     FieldName     Condition     Value       * TVM	

• Choose the fields that you either want to show in your report or that you want to query for your report. Not all fields or tabs in TrialWorks are available in the Custom Report Writer.

### QUERYING YOUR TRIALWORKS DATA

When clicking in the **TABLENAME** field the drop-down will appear allowing the user to choose the Table. Referring to the tables list above, select the Table which the data you want to appear in your report is entered.

😑 Advanced Filter		£3
Query/Filter Name: TVM	Rename Query     Duplicate Query	
🖉 QueryName 🚽 TableName	🚽 FieldName 🚽 Condition 🚽 Value	-
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When clicking in the **FIELDNAME** field all the field names that appear in the table chosen above will appear in the drop-down list:

-8	Advanced Filter							23
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Logical operators are mathematical or alphabetical comparison parameters, defined as follows: = when you want to exactly match a certain value; > greater than; < less than; <> does not equal; **IS NULL** data field is empty; **IS NOT NULL** data field is not empty; **LIKE** similar to; **NOT LIKE** not similar to; **SHOW** the field will appear in the report.

FOR EXAMPLE: To create a Report showing Clients where the date of accident is after December 2, 2001, use the following "limiting value."

TABLENAME:	Clients
FIELDNAME:	DOA
CONDITION:	>
VALUE:	#12/2/2001#

Alphabetical values must be set off by quotation marks; numerical values do not need to be set off by quotation marks; dates need to be set off with pound (#) signs.

# "IS NULL"/ "IS NOT NULL"

Use to include or exclude cases where fields are filled out (IS NOT NULL) or not filled out (IS NULL).



TABLENAME:ClientsFIELDNAME:SpouseNameCONDITION:IS NULL

# "LIKE"/"NOT LIKE"

Similar to "\*" or "!" in textual searches to either include (LIKE) or exclude (IS NOT LIKE) occurrences of all forms of text. The parameter allows searching of a particular word or root word no matter how or where it appears in the text.

### MAKING FIELDS APPEAR IN YOUR REPORT

Fields will appear in the order that they are entered into the filter.

### "SHOW"

Use to have the field appear in the report.

# Checkboxes

If the fields you want to query are represented by checkboxes select the checkbox field as you did above then:

CONDITION: =

VALUE: true

Once you have set up your query, Click on the close door icon and return to the CUSTOM REPORT EXPORT window.

# COMPAREMENT SOFTWARE D QUERY MULTIPLE VALUES AT ONCE USING AND/OR STATEMENTS This will allow you to limit your criteria to more than one value. FOR EXAMPLE: To create a Report that shows clients from multiple cities use the

following value.

TABLENAME:ClientsFIELD:CityCONDITION:=VALUE:"Miami" or [clients].[city]="Dallas" or [clients].[city]="Tampa"



You can output your report in

- Excel format (Excel) (this is the default choice)
- (Rich Text Format) to your word processor
- HTML format (HTML) to send directly as an email (click the E-mail button after selecting the HTML export format).
- Mailing Labels using the 5161 Avery Labels for Clients or Contacts.
- Email Address using the BCC or TO field or copy the list to your Clipboard



==	Advanced Filter	r				
Query/Filter Name: TVM					ename Query	Duplicate Query
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	CaseTable		SubLiability		=	"TVM"
	Clients		ClientID		SHOW	
	CaseTable		Referral Atty		SHOW	
	CaseTable		File #		SHOW	
	CaseTable		Referral Atty		IS NOT NULL	
	CaseTable		Case Status		=	2
CaseTable C			Case Name SHOW			
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