CUSTOM REPORT WRITER INSTRUCTIONS
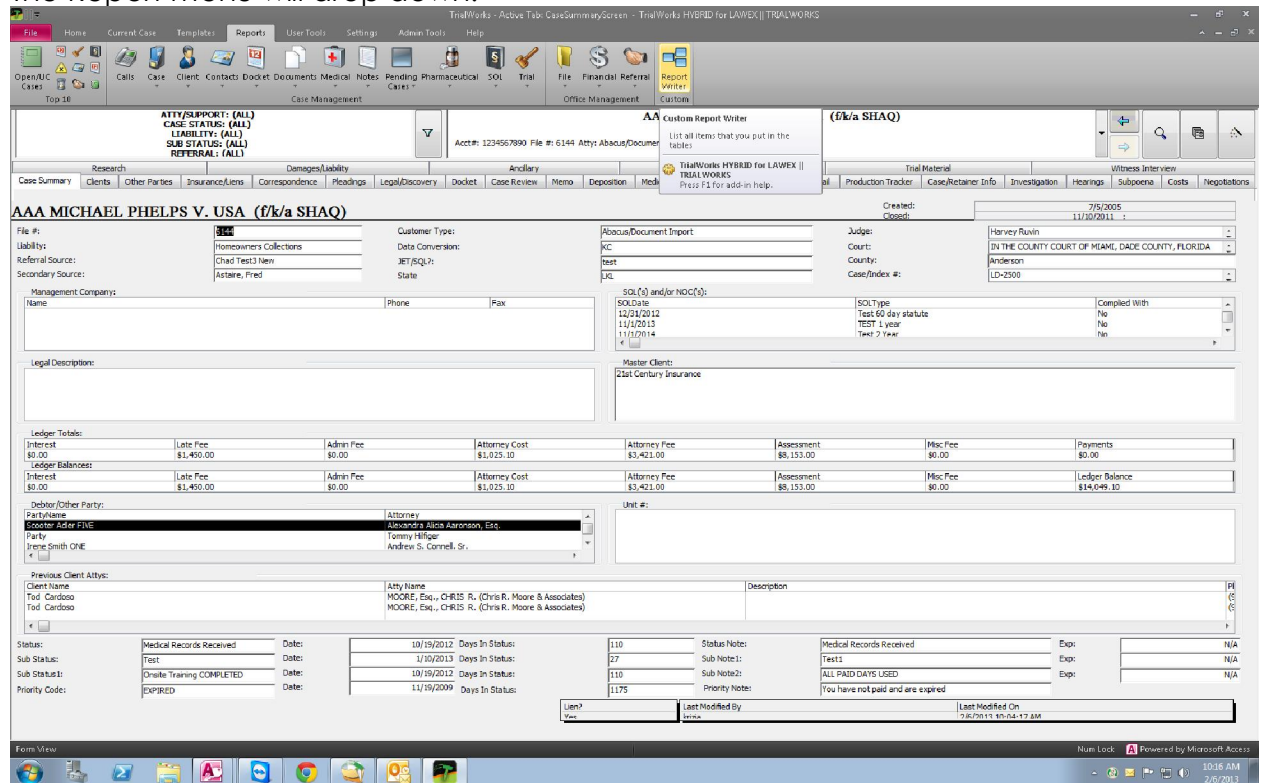
- Click on **REPORTS** on the TrialWorks Menu Bar
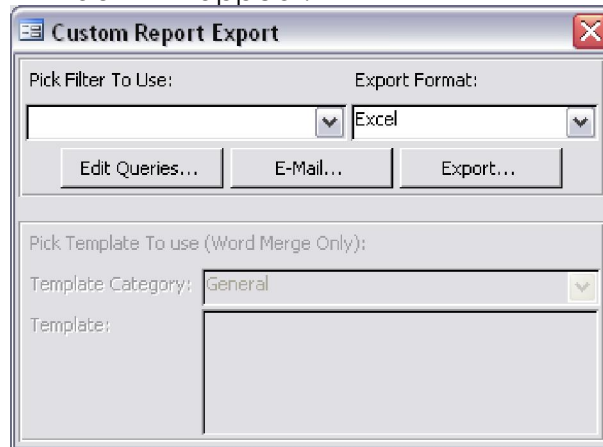
The Report menu will drop down:

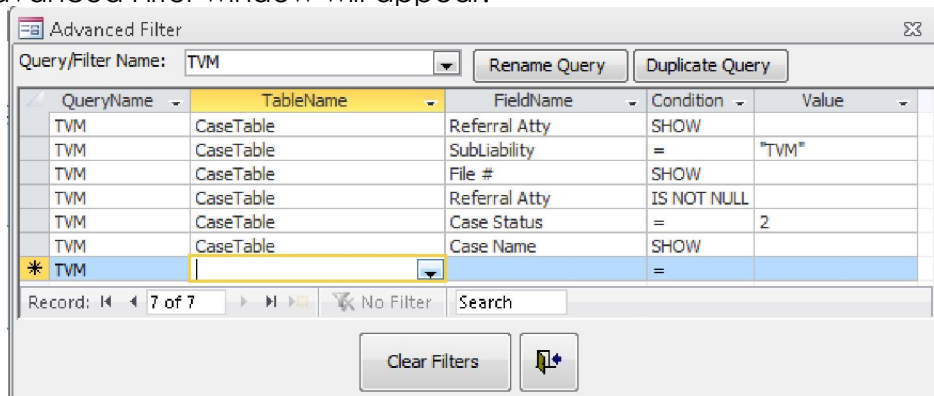

- Select **CUSTOM REPORT EXPORT**

The Custom Report Export window will appear:

- 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:

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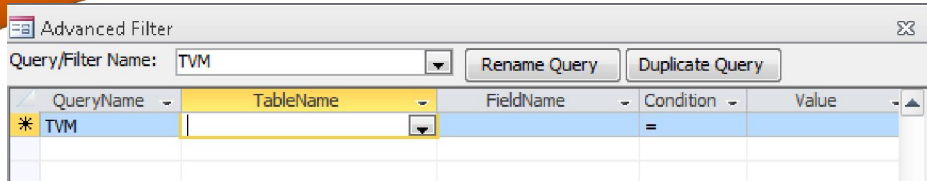
- Choose the fields that you either want to show in your report or that you want to query for your report. Not all fields or tabs in TrialWorks are available in the Custom Report Writer.

<div align="center">

QUERYING YOUR TRIALWORKS DATA

</div>

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:
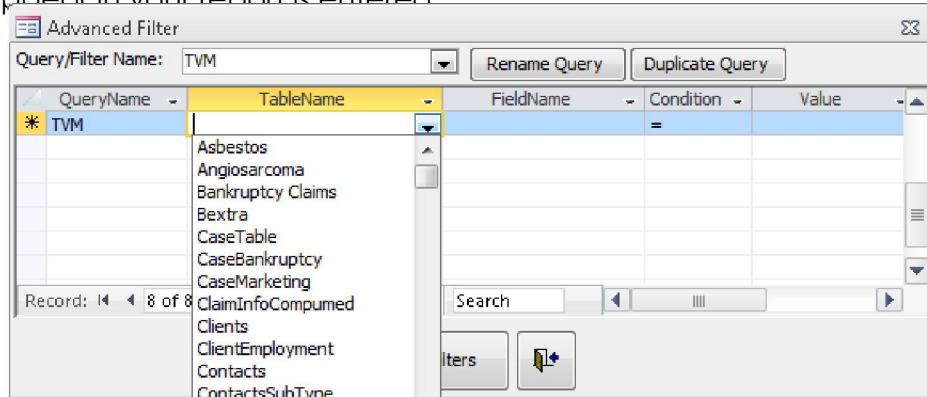
When clicking in the **FIELDNAME** field all the field names that appear in the table chosen above will appear in the drop-down list:
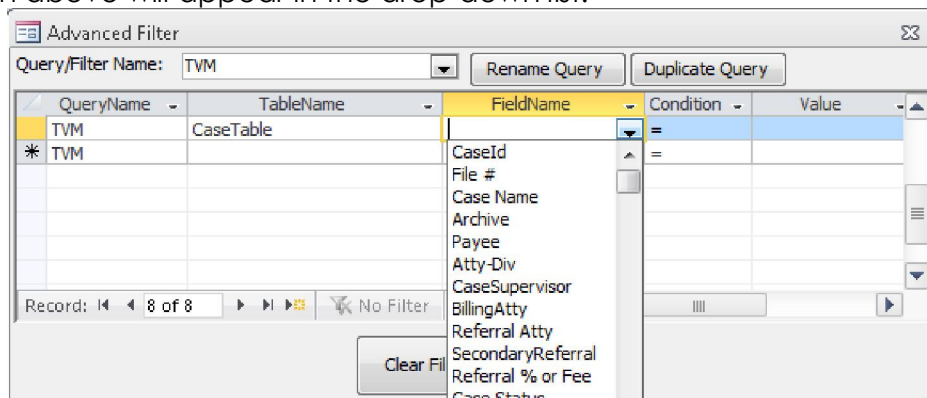
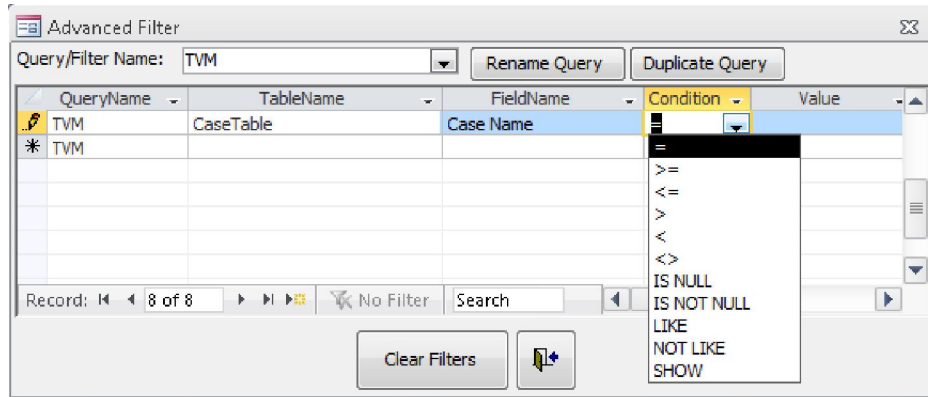When clicking in the **CONDITION** field the logical operators menu will appear:

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).

FOR EXAMPLE: To create a Report showing all Clients that do not have the Spouse field filled out, use the following "limiting value".

TABLENAME:	Clients
FIELDNAME:	SpouseName
CONDITION:	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.

TO 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.

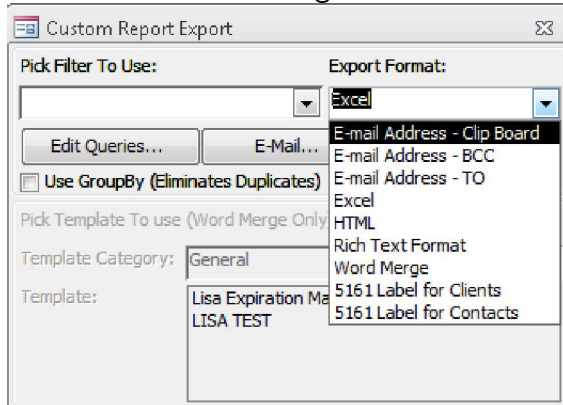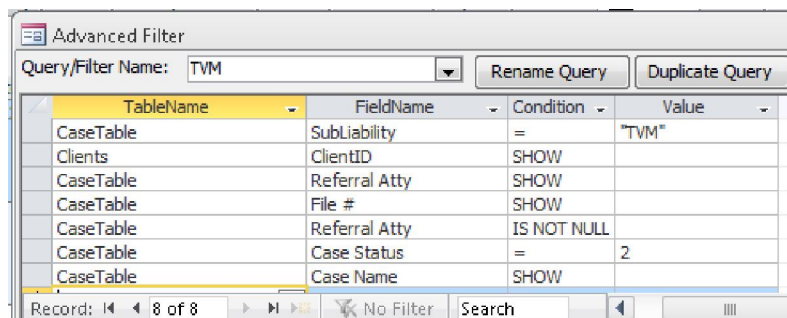TABLENAME: Clients

FIELD: City

CONDITION: =

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

GENERATING YOUR REPORT

Select your query from the drop-down list in the Pick Filter to Use

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