



VERSION 10.8

Released 7/13/2015

FEATURES

New Expanded Intake Cases Manager

Extensive details now include an Intake Dashboard that allows users to filter their list of Intake Cases. Some of the new fields added include Referral, Status and Sub-Status, Priority, Liability/Sub-liability, Created By, Assigned To and Rainmaker.

New Sections have been added to the Intake for: Other Parties, Vehicle Information, Docket, Insurance, Employment, Treatment, Medical, Documents, including Emails. Sections not wanted can be hidden from View in the Security Module.

Import Documents into the Intake Cases Manager to keep all of your potential client documents in one place digitally.

The TrialWorks Outlook and Office Addin also allow for Emails and other Word, Excel and PowerPoint documents to be saved directly to your Intake Cases.

Intake Cases are now included in TrialWorks Today, Reminders and Global Docket

Dashboard

The TrialWorks Dashboard will provide you with critical data to help you manage your caseload more efficiently with a more detailed look at groups of cases. Views can be created that will allow each user to export to either Excel, Word or PDF as well as the ability to Email the results. Create new views in the TrialWorks Dashboard that allows a user to review case information including medicals, notes and costs for multiple cases at the same time. Views can be designed for All Users or for My Views Only. Fields from most tabs in TrialWorks will be available. The new Dashboard will install with sample dashboards called: Cases Sample View, Clients Sample View, Total Cost List, Total Medical Costs, Insurance/Liens Sample View, Total Liens Cost, Case Settlement Info, Important Dates, Client Settlement Info,

Contact Types

Modified handling of Contacts by Global Contact types and Case Specific Contact Types. Firms will have an option to designate the specific contact types they want to appear in different areas of TrialWorks: Insurance; Adjuster; Court Reporter; Videographer; Police; Witness in the Contact Types Library. When creating a new contact the user will initially create a Global Contact Type. When inserting that contact into the case the user will have an



option to keep the Global Contact Type or add a Case Specific Contact Type. The Contacts Detail will show a new form that indicates whether a Type of Contact is Global or Case Specific. Adding a Case Specific Type of Contact will remove the Global type of Contact and show only the Case Specific Type of Contact.

When inserting a contact into a form it will no longer change the Primary Type of Contact (Clients, Other Parties, Insurance, Adjuster, Court Reporter, Videographer, Police or Witness).

IMPROVEMENTS

Address Book

- Double-clicking on an entry in the Address Book will Open the Contact Record.

Bookmarks

- Intake Bookmarks have been added for the entire Intake Cases Manager. The extensive list of bookmarks can be found on the TrialWorks Support Website at: [Intake Wizard Bookmarks Template](#)
- ItemizedCosts – bookmark pulls Date, Payee, Address, Task Code, Account and Cost Amount for current case
- Ledger History – updated date value and formatting for AssessmentBalanceBreakdownGrouped
- SSShort – bookmark will pull only the last four digits of the Social Security number
- Client Settlements bookmarks using SettlementAmount and SettlementAmountTotal
- Contact Detail bookmark for Gender: CorrSPronoun – he/she/it; CorrPPronoun – his/her/its; CorrOPronoun – him/her/it

Case History

- Add QTY and More Links documents to Case History

Clients

- Add Birth Place

Contacts

- Add changes to Type of Contact to allow for a contact type to be added as a Global Contact Type or to show as a Contact Type for “this case only”. Changes are part of a modification to all Contact Types that will see the removal of the Primary Contact Type in Version 10.9.
- Add Gender to Contact

eLaw

- If Location is provided by eLaw it is added to Docket Location

Help Menu

- Update reference to Current Features for <http://www.trialworks.com/downloads/versioning>



Office Addin

- You can now save Microsoft Documents to the Trial Materials tab
- The Office Addin now allows you to edit an existing document from TrialWorks and save it as a new document in TrialWorks

Other Parties

- Add Birth Place

Outlook Addin

- Includes the Intake Cases

Reports

- Negotiations History Report Added to Financial > Settlement
- Add hyperlinks to Production Tracker > Witness Exhibit Report

Security

- Add Call Log Add Contact to Field Level Security
- Add Notes Detail to Field Level Security

TrialWorks Today

- Add option to list all Overdue Tasks regardless of the designated time frame is chosen

User Defined Forms

- Changing a bookmark in a published form will now prompt the user to update the UDF and republish the form.
- Changes to a Published UDF are made immediately without the need to restart TrialWorks.
- Add Zoom to the UDF form for ease of editing (Right Click > Zoom or Shift + F2)
- Add height properties to UDF Note Fields. Options supported are Standard = 1 line, Tall = 4 lines, Xtra Tall = 8 lines, Xtra XtraTall = 12 lines. The default for all other fields are Standard = 1 line.
- Add Support for liabilities containing an apostrophe to show UDF for those cases



ERROR

Case Budget

- Correct error where Totals were not calculating

Clients

- Correct Tab Order error from County of Accident to State of Accident

Contacts

- Adding the following to Contacts detail now transfers to Clients and Other Parties: Middle Name, Language, County, Additional Phone Numbers, County
- Correct spelling error in Contacts Preview Pane for Specialty
- Correct error when inserting contact in Clients and Other Parties the Middle Initial did not transfer

Correspondence

- Generating an Envelope using the Write to Multiple Recipients created an envelope without the first and last name of the recipient
- Address Bookmark was incorrectly including contacts when correspondence was addressed to Multiple recipients

Costs

- Correct error where a user was allowed to add values to the Task Code field not included in the library

Docket

- Correct error when a user adjourns a docket entry to copy the details to the new item
- Correct error when a user adjourns a docket entry you could not change the month using the Calendar Drop-down window
- Correct error when Docket Days Left were blank

ELaw

- When using the TWService to update eLaw cases, cases using the NY Case type were not updating

E-Mail Multiple Documents

- Correct error where Deposition additional links were no longer visible
- Correct error when sending multiple documents as zip (compressed file) the zip was not created

Envelopes

- Combine multiple contacts for one envelope from the Correspondence Tab



FileIT

- When transferring documents to Production Tracker the From field prevented the document from being transferred. Truncate the excess characters over 50 when transferring the From field.
- Correct error when transferring to Medical (additional) Link to a New Record

Global Settings

- Addins – adding a Payee caused a run-time error

Ledger History

- Correct error in payment breakdown when the payment equals the balance
- Add NSF to the account breakdown of totals

Medical

- Correct error when closing the Medical Payments window using the “X” caused TrialWorks to close
- Correct error where totals for Amount Billed Amount Paid and Amount Owed are blank
- Removed the incorrectly added field for “Additional”
- Correct Error when generating a Follow-Up document with the Address and TOFaxNumber Bookmarks

New Case Wizard

- Correct Error when using Insert Existing Contact for the Other Attorney the Email Address was removed from the contact record

Online Records Request

- Correct error when cancelling MediConnect Records Request caused TrialWorks to lock

Replication

- Correct error where the Add Notes from the Ribbon showed #Name
- Allow Timekeeper entries to be saved

Reports

- Contacts Detail Report was not showing the Contacts Type
- Docket Report With Date Range produced an error
- Open and UC Cases did not generate
- Medical Reports > Detail Medical Report was generating with the Provider Name and previous medical history was cutoff

Settlement Calculator

- Correct error when adding Date or Settlement Amount did not update in Settlement Info



SOL

- Correct error when adding an SOL type that contained an apostrophe caused the SOL Date to show 1899 rather than properly calculating the SOL Date.

User Defined Forms

- UDF Button was missing when liability contained an apostrophe

Contact the TrialWorks Training Department to arrange for your Upgrade Overview once your firm has Scheduled the 10.8 Upgrade. Send an email to [Schedule an Upgrade](#)