



TrialWorks Version 11.4 announces an update packed full of new Features, Improvements and Performance Updates

What's New

TABS

Added support for custom tab aliases. Firms will now be able to name their tabs anything they want. Custom tab aliases can be assigned for each tab configuration, so they can be set up for each Office Location, Liability and/or Case.

CAPTION

Added the ability for users to choose a default Caption record for each case. The default record will show first when opening the Caption tab, as well as when generating documents on other tabs.

CASE INFO

Added option to generate an email when a case has been assigned to an Attorney. Email will be populated via an Email Template, so bookmarks can be used to populate case data. Recipients will include the Attorney and the Case Invitees.

CONTACTS

Users are now able to attach documents directly to a contact, rather than having to upload them into a case. The user can then change the Date, assign a Type and type some Notes pertaining to that document.

USER DEFINED FORMS

Added support for having multiple records within a User Defined Form associated to the same Case/Client/Other Party/Intake. If enabled for the UDF, the user will now see a record navigator within the form including an Add and Delete button.

Added Transaction Log support to User Defined Forms. Administrators are now able to pull a report detailing which user(s) created or deleted records from the UDF, as well as made any changes to the data contained within the UDF.

Improvements

BOOKMARKS

Updated DisabilityType bookmark to pull entire table

CASE INFO

Added ability to use Fix Drop Down Items on Case Stage

CASE SEARCH

Updated Case Search to better support searches with very large results

CLIENTS

Converted Client Role to a library

CONVERT TO PDF

Changed the Convert to PDF using Word processes to use the PDF/A standard

DELIVERY INFO

Records within the Delivery Info section of all tabs are now sorted from Newest to Oldest

DOCKET

Added Judge and Part fields to Add to Docket for NY firm setting

EMSI

Bills imported from EMSI will now reference the original Request Date as well as the Medical Provider

MAILING WIZARD

Added the following fields for bookmarks in document generation from the Mailing Wizard: Insurance, Caption, Client, Other Party

NEW CASE WIZARD

Changed labels of Clients and Other Parties in Insurance Defense wizard to Defendant and Plaintiff, respectively

Added Global Setting to control Non-PI Matter checkbox for new cases

SECURITY MODULE

Added the following fields from the Clients tab to the Security Module: Birth Place, Cause of Death, Client Image, County of Accident, County of Death, Extension, Extension Date, Place of Death, Raised Place, State of Accident, UDF Button 1, UDF Button 2, UDF Button 3

TRIALWORKS

Added Party Name field to the following tabs: Damages, Docket, Investigation, Notes, Production Tracker, Research, Trial Material, Witness Interview

Added Case Name to the following tab datasheets (hidden by default): Ancillary, Appeals, Correspondence, Damages, Deposition, Discovery, Documents, Email, Insurance, Investigation, Medical, Motions, Negotiations, Notes, Pleadings, Production Tracker, Research, Subpoena, Trial Material, Witness Interview

USER DEFINED FORMS

Optimized opening User Defined Forms by loading each tab on demand when clicked on

Updated theme of User Defined Forms to be in line with the rest of TrialWorks Records within User Defined Forms linked to child cases will now show in master cases

Added multi-record support to User Defined Form bookmarks

Errors

CALL LOG

Unable to scroll in the Notes field

Case SEARCH

Clients with a DOA set to 1/1/1900 appeared in every search result

CONTACTS

Unable to scroll in the Notes, Case Notes and Relationship to Case fields
Issue caused by having multiple Sub Types with the same name in different Categories

DATASHEETS

Unable to hide Typist column on the following tabs: Ancillary, Appeals, Experts, Discovery, Deposition

DOCKET

Unable to scroll in the Description and Details fields
Error when creating an email from a Docket item with multiple lines in the Subject

FastTrack

Items sent to Outlook Task would have Start Date of 12/30/1899

FILEIT

Document Categories with apostrophes not working
Document Categories not working in FileIt for the following tabs: Email, Production Tracker, Witness Interview

INSURANCE/LIENS

When opening Notes field, NumLock would be toggled

INTAKE WIZARD

Error emailing out of Intake Wizard when including fields user is locked out of Mailing

MAILING WIZARD

Automated time entries not working in Mailing Wizard

NEW CASE WIZARD

New Case Email not being sent when creating new cases
Generic Atty/Supp Assigned To were not being replaced when Fast Track was applied to new case

OFFICE ADD-IN

Office Add-In showing Legal instead of Discovery
Error when using Template Wizard on template already in TrialWorks

OUTLOOK ADD-IN

Unable to file email to Intake Cases
Add-In pane cutting off when not pinned

REPORTS

Medical Summary report shows every other page as blank page
Time Report would not include time entries on the same day as the ending date of the report
Unable to filter Closed Case Report (Liability) by Sub-Liability
Bates Code Report sorted alphanumerically instead of numerically
Medical reports not correctly showing Paid By information

Stamps.com

Error occasionally when attempting to print envelopes

TIMEKEEPER

Unable to scroll in the Explanation field

TRANSACTION LOG

DocketID not logged when creating new docket entry

TRIALWORKS

Issue opening PDF documents with a program other than Adobe Acrobat

Issue opening MSG files more than once

USER DEFINED FORMS

Error when attempting to unpublish and re-publish a UDF after making a change to the form