



VERSION 10.6 UPDATES

Released 2/21/2014

Features

Performance Overhaul

TrialWorks Version 10.6 focused on improving productivity by providing a user quicker response

Improvements included:

- Opening TrialWorks
- Switching Tabs
- Changing Cases
- Tab load

Improvements

- Case History –
 - Add Medical Tab Additional Links and Deposition Transcript Links (enabled for TrialWorks APP)
 - Add Cost Invoices
 - Add Investigation
 - Add Production Tracker
 - Add ability to open Detail Windows from any field
- Clients Tab –
 - Labor Case – Discrimination Case Type field changed to self-building and added Sexual Orientation added to the drop-down
- Configuration Wizard –
 - Add Status during Backup Procedure
 - Modify automated backup location
 - OLD:<Mdf Location> (C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data)
 - NEW: <SQLDataRoot\Backup> (C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup)
 - Installation – Installer checks for Window 8 or higher and if present will not install the indexing service which is no longer supported per workstation.
- Contacts – improvements in preview panel layout at bottom of the Tab
- Contact Search – will now include all contacts added from the Intake Cases Manager shown on a separate tab called Intake Cases Manager

- Costs – Add Client field to Costs Tab to help filter costs in cases with Multiple Clients
- Custom Report Writer – Add Suffix to the Contacts Table
- E-Mail Multiple Documents (Home > Email) –
 - Add Deposition Transcripts
 - Add option to choose Link, Additional or More Links for all document tabs
- Fast Track – form opens full screen and can be resized by User
- Global Settings –
 - Add (All) when choosing to link a library to Divisions
 - Add/Remove Tabs - Allow Case Summary Tab to be hidden
- Intake Cases Manager –
 - Add Spelling to all Notes Fields
 - Allow users to delete multiple rows
 - Allow users to edit hyperlink from the right-click menu
- Medical – Remove Create New Contact icon. Insert Existing Contact includes Create New Contact
- Notes –
 - Allow Detail Window to open from any field
 - After deleting a note place cursor in Next Note
 - Note Auto Save feature is controlled by Global Settings > Other Settings
 - Off
 - Every 1 minute
 - Every 5 minute
 - Every 15 minute (Default)
- Other Parties –
 - Ledger History – Add the Case Name to the top of the form
 - Other Attorney – Automatically tag any email created from the Other Attorney's Email Address
- Reports – Add Atty/Support and Case Filters to Report Options for
 - Envelopes – Address field now wraps to accommodate custom margins
 - Financial > Fees > Fees Earned by Month Year
 - Financial > Fees > Cases Won by Level
 - Referral > Fees Earned by Referral and by Year
- Security –
 - Modified "Lock User Out of a Case" to include
 - New Name "Lock User/Group Out of a Case"
 - If a user/group is locked out of a case it will not appear in the case list drop-down
 - Add Other Parties > Recording Info (for Assessment Enforcement cases)



- Transaction Log – add
 - Clients
 - Association
 - Other Parties
 - Ledger History
 - Legal Description
 - Property Recording
- TrialWorks –
 - SQL Server 2012 compatible
 - Re-Attach Window has been redesigned for cleaner look
 - Add Qty field to all document tabs to show number of items in More Links

Error

- Contacts – When clearing the checkbox designating an Expert in the Contact detail, the tab filter was lost when filtered for Experts Only
- Fast Track – correct error to allow up to two “Assigned To” users
- Hearing/Motions – correct error that hid Additional Links
- Other Parties > Ledger History –
 - Correct error in Balance calculation (balance was off by 1 cent when interest calculation was based on a percentage)
 - Correct error when deleting a row took you to the top of the form
- Medicals – Correct tab flashing when closing reports
- Multiple Templates – correct error that caused bookmarks not to complete
- Notes – Write Conflict Error appeared after adding a file to a Note and then editing the body of the Note
- Reminders – correct error when completing a docket entry from another case that had a linked Fast Track item, prevented the additional Fast Track items from being added
- Reports
 - Correct error in Other Parties > Ledger History > Account History Report which did not handle voided payments
 - Correct error in Reports > Docket > Calendar Report by Jurisdiction when choosing “Do not include entries without time”
 - Correct error generating Pleadings Report sorted by date caused the entries to re-sort from previous reports
- Summation –
 - Correct error that prompted the user to check User Default Values to enable Summation
 - Correct error exporting to Production Tracker