



VERSION 10.2 UPDATES

Features

- Link to separate Microsoft Access database through Case Types (Liabilities)
 - Database is available through Intake Cases Manager and
 - Clients Tab in TrialWorks. Database is available through Mass Torts button on Clients Tab called 'Custom Questionnaire'.
 - *Note: Requirement of Custom Database link is to ClientId and CaseIntakeID*
- New Window called **TrialWorks Today**. Includes Critical Dates, Appointments, and Tasks. Shows Case Activity by type of activity (documents, calls, emails, notes, and docket) and Case Inactivity. Generated for User or by Case for timeframes of Today, This Week, This Week and Next, This Month, This Month and Next, Yesterday, Last Week, Last Month and Custom.
- Add field to mark **Docket Categories** as Critical Dates for inclusion in TrialWorks Today.
- Enhanced **Upgrade Procedure** where TrialWorks will automatically upgrade itself without the need to send upgrade commands. Build # field added to **Global Settings TW Registration** and can be found in the initial screen of the TWClientInstaller.
- Add download and import capability from **Copitrak**. Combine feature button on **User Tools** called Equitrac/Copitrak Summary Import.
- **Docket Tickler Detail** from the Home Ribbon now includes a notes Detail field that will add Notes to the Body of the Outlook Calendar item.
- Add **Global Setting (Other Settings)** to automatically generate a Contact Conflicts Report when a new case is created. The Conflicts Reports will be saved to the Memos (Documents) tab.

Improvements

- Change **Bookmarks** for Client Employment from "Note" to "EmploymentNotes"
- Reposition the Non-PI matter checkbox on the **Case Retainer** tab to be located with other case checkboxes
- Add CourtState field to the **Caption** Tab
- From the **Clients** Tab with a record linked to the **Contacts** Tab, fields that will automatically update when changed are: ContactFirstName, ContactMiddleInitial, ContactLastName, CompanyName, Address, City, State, Zipcode, PhoneNumber, HomeNumber, EmailAddress, Title, FaxNumber, DOB, CellNumber, PagerNumber, Social Security, DateofDeath and Language
- Add ability to close out of **Docket Tickler Detail** window using the "EXIT" button. If the fields have been populated, the user will be asked to Save the Changes as a new Docket item.

- Add ability to open same Email from the **Email** Tab multiple times in succession. Lock on file previously prevented user from open Email twice
- Add sub-liability to link **Fast Track**
- Add pop-up window to **FileIT** when user tries to change the description of a file to more than 255 characters (prevented by Microsoft)
- Add to **Global Settings (Formatting)** a new File # naming convention for an incremental 5 digit number with a leading 0
- When the **Global Settings (Formatting)** default format for Contacts Save as is Last Name, First Name (Company Name) and you have a Contact with only a Company Name the Save as will be Company Name
- Update link to Tech Specs from the **Installation Wizard**
- Add the ability to choose Client or Other when transferring records to the **Medical** Tab with **FileIT**
- Include link to file attached to the Notes detail when emailing the Note from the **Notes** Tab
- **Intake Cases Manager** – add the comments from Section 2 to Contact Detail Case Notes
- Add modification for a hyperlink to be attached to an Outlook Calendar item when a **Docket Tickler** is generated from a document tab
- **Medical** Tab now has the Additional and # Columns for viewing hyperlinks from the tab itself
- Add new fields to **Other Parties** Vehicle Info
- Add feature to right-click menu on **Production Tracker** on the hyperlink to Rename Hyperlink
- The **Report** Closing Statement - Liens section will now pull the Name of Lienholder and not the Lien Rep.
- New **Report** to Notes Reports called Notes Report. Includes Date, Category, Case Status, Author and Description
- New **Report** to Case Reports called Closed Case Report. Includes Date range to generate report
- Modify the Client Birthday List **Report** to ignore any client where the Date of Death field has been populated
- Add new **Report** for TrialWorks Today called Global Calendar Report available on the Docket Reports menu
- In the Contacts Conflicts **Report** include the name of the individual or entity search in the Title of the report
- Add Negotiations to the **Security Module**
- Increased size of Task Code field in **Templates** Library
- On cases marked billable do not prompt to open the **Timekeeper** window for entries being edited.
- **Transfer Records/Transfer Multiple Records** now can be used to transfer to Research(Briefs), Research(Law), Research(Medical) and Research(Other)
- New Validation Routine for **Upgrade Utilities** to verify all database objects were created.



Error

- Fix Employee multi-record **Bookmarks** from ignoring the first row in Employment/Work History
- Enable Additional Email Field to auto-create an email message when clicked on from **Contacts** Tab Preview Pane
- Fix Save Layout for **Correspondence** Tab
- Fix error in **Docket Detail** when adding docket date the Assigned By field was blank. Assigned By automatically populates from User Default Author field
- Fix error that caused a document to be dropped from the **Email** and **Fax** windows
- Fix error when adding docket date was allowed when falling on a Holiday. Dates must be added to the **Holiday Library** from Settings
- Unhide the Primary checkbox on the **Insurance** Tab (hidden by default)
- Fix error when updating Adjuster on the **Insurance** Tab did not update on Case Summary
- Fix error when changing cases from the **Memos** Tab the data did not update to the current case
- Fix error on **Medicals** Tab that caused an additional record to be added to the Medical Detail window
- Fix Error in **New Case Wizard** when using the General Litigation wizard the Plaintiff checkbox was checked for Other Parties Tab
- Fix error from **Other Parties** Tab when prompted to mark an SOL complied with did not mark the date activity was made in SOL Entry Form
- Fix error when using the Save Layout for the **Pleadings** and **Legal/Discovery** Tabs would not save changes to the Date field
- Enable error message when transferring a PDF file from **FileIT** when the document was open and being viewed.
- Fix error where **FileIT** would not save the All Active Cases option
- Fix error when generating the Date Specified SOL **Report** caused a syntax error
- Fix error where Numlock Key would turn off after opening and closing a TrialWorks **Report**
- Fix error Closing the **Timekeeper** window using the "X" caused a blank record to be created
- Fix error in the **TrialWorks Outlook Add-in** that prevented a user from disabling the Filing from Reading Pane in Outlook 2007
- Fix error in **XML Importer** where SOL field on the Clients tab was dropped on import