



## VERSION 10.5A UPDATES

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### Features

- Social Security
  - Submission Information – add additional fields
  - Disability Information – add additional fields
  - Work History – New Tab
  - Opinion Evidence – New Tab
  - Add Trigger to update Fees Earned to the Case Retainer > Fees field if it is blank
  - Add Trigger to update Judge to the Caption > Judge field if it is blank
- Global Settings
  - Other Settings – Add option to start Timer when Timekeeper is launched. Start time begins immediately
  - Timekeeper – add new option to start timekeeper when switching into a case
- Home Ribbon
  - Docket – Move Add to Docket to the Docket Grouping
  - E-Mail Multiple Documents – Add option to send Internal Email. Will contain hyperlinks to documents rather than attachments.
- Timekeeper Manager
  - New form accessible from the Home Ribbon that gives users the ability to Add, Edit and View multiple time entries from a maximized window. Form can be left open while working in TrialWorks.
- TrialWorks
  - When a user receives an error that the firm is out of licenses it will allow a user to connect as the TrialWorks Administrator. Requires the user to be set as Admin in Security. TrialWorks will open with just the Settings, Admin and Help Ribbon and the user can access Settings > Global Settings, Admin > Send Admin Message, Security Module and the Help Menu.

### Improvements

- Admin
  - Transaction Log
    - Add logging when a Contact was added from Contact Search
    - Add logging from the Liens section of Insurance/Liens
  - Case Password
    - User must have Admin rights to add/edit/delete this field



- Case History
  - Update Case History to reflect alternative tab names instead of Defaults
- Case Retainer
  - Add Fix Drop Down to Referred Out, and Referral %
  - When marking a case as Closed the user is presented with a prompt to Mark All Outstanding Docket entries as completed
- Clients
  - Add warning that deleting a Client will delete all associated Medical Records
- Contact Search
  - Add Middle Name
- Costs
  - Add Attachment to Email Cost when creating a new Cost entry
- Custom Report Writer
  - Add Social Security table and all fields
- Damages
  - Add Date Field
  - Deposition Detail
  - Caption - Add default value
- Deposition
  - Add Date Filed
- Docket
  - Update RJ1 field to have a date input mask
  - Add field to Datasheet to show Case Name. Used when linking cases with Case Links.
- Email
  - Add right-click menu to Category field
- FileIT API
  - Add option to add documents to the Pleadings Tab whenever a Deposition, Subpoena or Motions is filed.
- Global Docket
  - Add (All) as an option to Attorney/Support
- Global Settings
  - Add/Remove Tabs – when you modify the tabs using both Liability and Case Specific, the Case Specific setting will prevail
  - Choosing show Acct # now updates the Case List Drop-down
  - Choosing show Acct # now modifies the option on the right-click menu to Search by Acct #
  - Enable Timekeeper Start Time on Opening Time Entry form
- Help Ribbon
  - Contact Us – Update website page to open <http://www.trialworks.com/Contact>



- View License – Update website page to open <http://www.trialworks.com/License>
- Home Ribbon
  - Contacts Search – add Copy Contact Details button that will copy the following fields to the clipboard
    - First Name, Last Name, Company, Address, City, State, Zip, Work Phone, Car Phone, Fax Number, Pager, Home Phone and Email Address
  - Fax – allow the form to be maximized and reset when minimized
  - Global Dockets – allow form to become full size
  - Reminders – allow form to become full size
  - Searches > Search All Documents – allow a user to search by blank Author and Typist fields
- Insurance/Liens
  - Add Fix Drop Down to Insurance type
  - Add Notes field to Liens section
- Intake Cases Manager
  - Alphabetize the Attorney Name drop-down list
- Investigation
  - Add ability to delete multiple entries
- Labor
  - Add additional option to Case Type drop-down on Clients Tab to include Sexual Orientation
- Legal/Discovery
  - Add sort and resize to Notes and Due Date Column
  - Add Date Filed
- Motions
  - Add Date Filed
- Negotiations
  - For cases marked with a defense case type, populate the following fields from Other Parties: Date of Accident, Lost Wages, Party Name
- Outlook Addin
  - Add ability to choose alternate Office Theme and continue to use the Addin to move emails to the Email tab in TrialWorks
- Other Parties
  - Add warning that deleting an Other Party will delete all associated Medical Records
- Pleadings
  - Add Date Filed
- Production Tracker
  - Increase size for Bates number fields from 10 to 20 characters
- Reminders
  - Add (All) as an option for Attorney/Support

- Reports
  - Add option to generate all reports by Sub-Liability
  - Case List Summary Report – Add criteria to pick multiple Case Status
  - Contact Detail (Contacts Tab Printer Icon). Update fields to match current Contact detail labels
  - Financial > Fee
    - Fees Earned each Month & Year
    - Cases Won at Initial Filing and Fees Earned
    - Referral by Year and Fees Earned
  - Pending Cases
    - Pending Cases by Judge – add filtering by liability and case status
    - Pending Cases by Jurisdiction – add filtering by liability and case status
  - Templates – Print a List of Templates – reformatted the report for easier reference
  - Trial Report – add criteria to allow report to be generated by Case Status Open and On Calendar
- Security
  - Case Retainer – add Master Client
  - Caption – add Case Name Court Address, Plaintiff, Defendant, Third Party Plaintiff, Third Party Defendant
  - Clients – Marital Status, spouse SSNo, Employment School History, Insured, Hospitalized, Ongoing Treatment, Property Damage Amount
  - Case Summary – Case Facts
  - Modify “Lock a User Out of a Case” feature to not show the case in the Case List Drop Down and enable Groups
  - Other Parties – Employment School History, Mass Torts, Property Info, Ledger History
  - Production Tracker – add all fields to Field Specific Rights
  - Social Security – add table and all fields to Field Specific Rights
  - TWApp – Use Login Name and Password to enable access to the App. Use TWApp Disabled to instantly remove access
- Status Note Code
  - Add the field to the datasheet for the following tabs: Ancillary/Miscellaneous, Depositions, Docket, Correspondence, Legal/Discovery, Motions/Hearings, Medical, Memo, Pleadings
- Subpoena
  - Remove ability to edit entry from the Subpoena Tab. Users must open Subpoena Detail to edit an entry
- Templates
  - View a List of Bookmarks - Add the AttyServiceEmail field and modify all AllAttorney bookmarks to show the addition of the service email address
- Timekeeper
  - Enable Timekeeper start time when the Time Entry form is launched



- Transfer Multiple Records
  - Add checkbox to select All Records
- Trial Material
  - Add Date field
- Witness Interview Detail
  - Caption – Add default value

## Error

- Ancillary
  - Correct error when deleting a record appeared to not update the tab to reflect the record had been deleted
- Clients
  - Remove tab refresh that caused the screen to flash
  - Correct error that caused a PDF document linked in Client Medical Authorizations and Contract to open twice
  - Correct error that caused an Other Attorney record to duplicate as many times as it had different Contact types
  - Correct error when sending an email by clicking on the client Email Address caused the email to contain a Bullet List
  - Medical Authorizations – Change file type default when using the ... button
  - Correct error that caused a Client image to be hidden if Case Type was indicated as Defense
- Custom Report Writer
  - Correct error here DateCreated would not pull unless you added one day to your date
- Damages/Liability
  - Correct error that prevented Excel .xlsx documents from opening
- Deposition
  - Correct error when deleting a record appeared to not update the tab to reflect the record had been deleted
- Documents Tabs
  - Correct error that caused files in Additional and More Links to open twice
- Fast Track
  - Correct error that prevented a Fast Track from being linked to more than one Liability/Sub-Liability
- Home Ribbon
  - Fax – Correct error that broke the addressee lastname, firstname (fax #) into two separate recipients
  - Searches > Search All Documents – correct error when searching Correspondence caused the search to lock up
- Templates
  - Print a List of Templates – Correct close report to close all generated pages

- Motions/Hearings
  - Correct error when opening multiple PDF documents a previously opened document appears instead of the hyperlinked document
- Notes
  - Correct error after you filter the tab and then delete an entry the filter was lost.
  - Correct error when printing a new note dropped the Case Name in the Notes report
  - Correct error that caused an error when using Task from a Note caused the Outlook Task body to disappear after a user clicked Assign Task
- Other Parties
  - Correct error that prevented the Other Attorney contact from being added to the Contacts tab when the Other Party Partyname included an apostrophe
  - Vehicle Info - Correct error that added an additional record to form after entering data in the Occupants field
- Production Tracker
  - Add Read-ahead Count to cure problem when a large case was filtered on the datasheet view caused the tab to lock
- Reports
  - Contact Reports
    - Case Report Limited by Contact Type – Correct error that caused duplicates
    - Case Reported Grouped by Contact type – Correct error that caused duplicates
  - Notes Report
    - Notes Reports – Correct error where the Attorney/Support showed incorrect values
  - Docket Reports
    - Detailed Docket Report – correct error where odd characters appeared instead of the Description
- SOL
  - Correct error that allowed a user to manually enter a date in the Clients SOL field when they had removed edit rights in Security
- Settings
  - Docket Category – Correct error that added multiple docket entries when creating a docket tickler and adding an activity that appeared multiple times in the library
  - Add to Experts Tab – if you enable Add to Experts Tab and create a new Medical Visit request without a Date of Treatment the entry the user is not prompted to Add to Experts Tab.
  - Fast Track – correct error when resizing the fields caused a new field to appear with #Deleted
- Transfer Record
  - Correct error when transferring to medical and the record didn't show on the tab