

Fixing Drop Down Menu Items

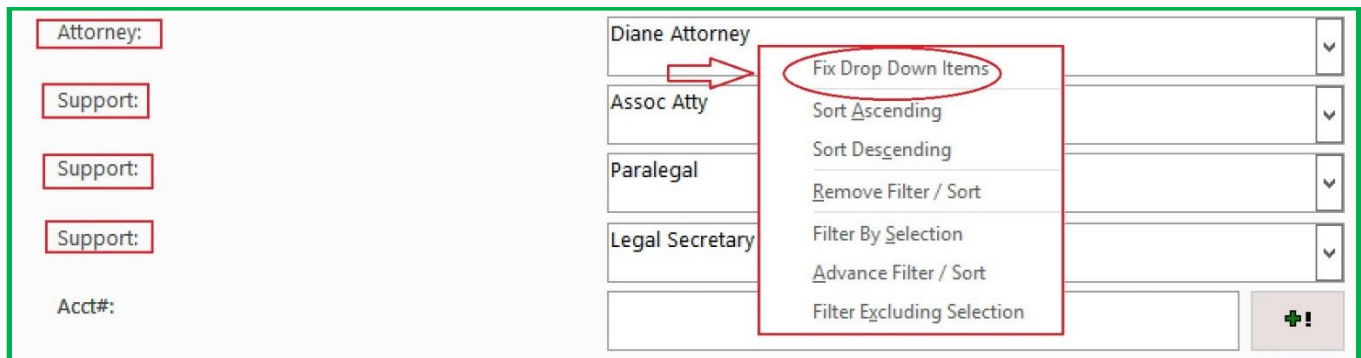
Version 11 and higher

The Fix Drop Down feature allows you to easily clean-up or replace a user's case assignments with one easy click. Need to tailor your attorney/support lists? This feature will instantly update all your cases. How about reassign all docket assignments from one user to another? No problem! Admin Users can the Fix Drop Down fields.

Fix Drop Down Menu within Case Info Tab

Case Info >

- Start by going to the Case Info tab of any case.
- Right click inside of the Attorney or Support field to get the following fix drop down menu:



- Fix Drop Down Menu displays, providing you the opportunity to type in the New Value for the name (Old Value) you wish to replace or modify.
 - **Note:** *If history isn't important, you may remove initials completely leaving the New Value field blank. Be cautious, however, because removing initials completely will also remove the history that was associated with that user.*
 - **Recommendation:** TrialWorks recommends that instead of removing a user name, you instead add the letter "z" in front of the user name in the New Value field, thereby pushing that username to the bottom of any dropdown list.

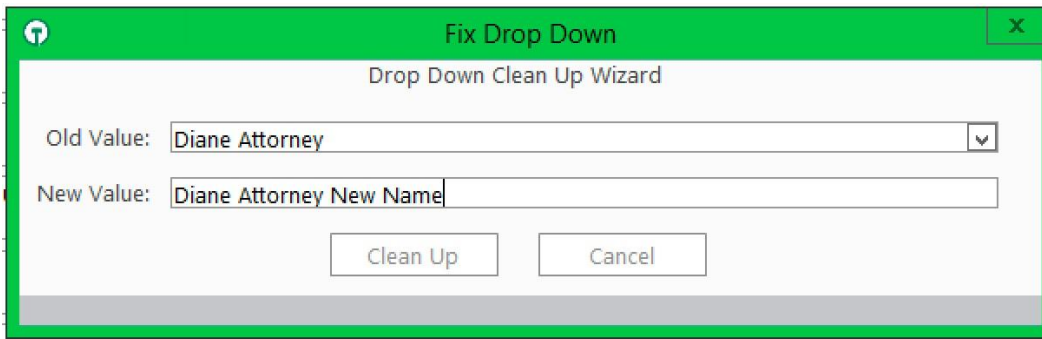
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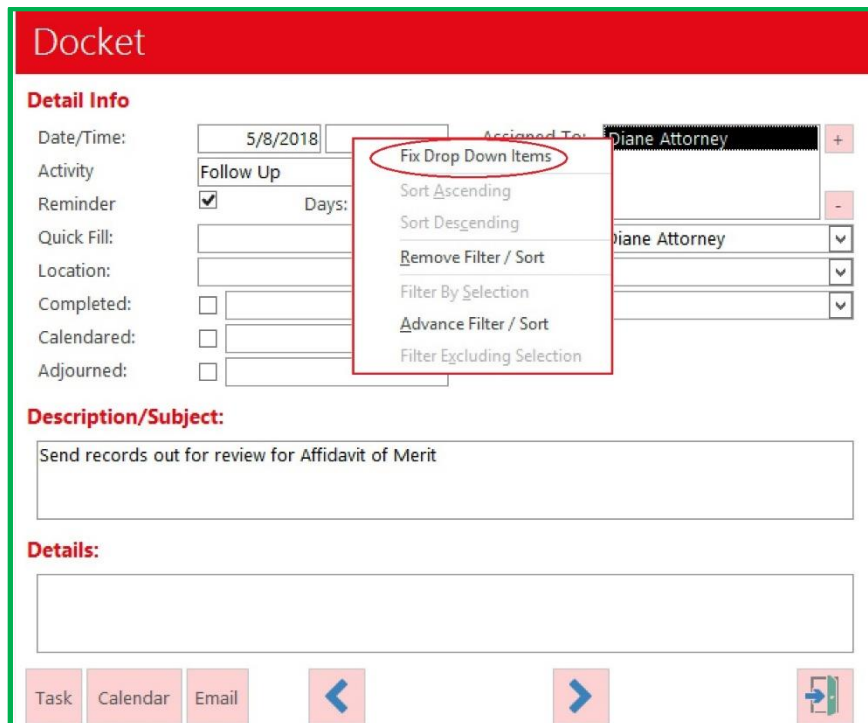


- Click **Clean Up** to launch the Fix Drop Down process
- Refresh Tabs
- Go to User Tools and select Recreate Atty/Support list to retain the changes.

Fix Drop Down Menu within Docket Tab

Docket Tab >

- Start by going to the Docket Tab of any case.
- Select an existing docket item and double click to open the detail window.



- Right click in the assigned to field and get the fix drop down menu
 - You can select to replace one user(s) docket items and transfer them to another user
- Click Clean Up to launch the Fix Drop Down process

(All existing Docket items will now be transferred to the new user.)

Fix Drop Down is available throughout TrialWorks to aid you to keep a clean self-building drop-downs. Use this feature wherever you see misspellings or duplicate values.

