

# Using the History Tab in TrialWorks

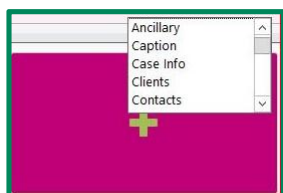
Version 11 and higher

*TrialWorks History Tab is the perfect place to learn what has been going on in your case. Row-by-row, the History Tab is automatically populated with details of the work being performed on a case. Sent an email? You can find it on the History Tab. Generated a letter? You'll also find it on the History Tab.*

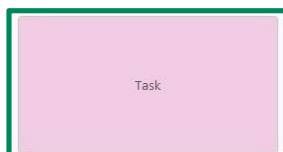
## History Tab



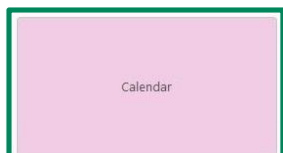
Using the buttons below, you can easily create a new document, create a task in Outlook, add a calendar item in Outlook, send an internal email through Outlook, or create a report.



- Create Something New – Add a new Client record, generate new discovery, or create a new pleading. Without navigating to another Tab, create something new!



- Create a Task in Outlook



- Add a Calendar Item in Outlook

# TRIALWORKS

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➤ Send an Internal Email through Outlook



➤ Create a Report

**Reports:**

Case History Report

Choose the Tabs to Include in the Report:

<input checked="" type="checkbox"/> Ancillary	<input checked="" type="checkbox"/> Liens
<input checked="" type="checkbox"/> Appeals	<input checked="" type="checkbox"/> Medical Tab
<input checked="" type="checkbox"/> Correspondence	<input checked="" type="checkbox"/> Memo
<input checked="" type="checkbox"/> Costs	<input checked="" type="checkbox"/> Miscellaneous
<input checked="" type="checkbox"/> Damages/Liability	<input checked="" type="checkbox"/> Motions
<input checked="" type="checkbox"/> Deposition	<input checked="" type="checkbox"/> Notes
<input checked="" type="checkbox"/> Docket	<input checked="" type="checkbox"/> Pleadings
<input checked="" type="checkbox"/> E-mail	<input checked="" type="checkbox"/> Production Tracker
<input checked="" type="checkbox"/> Hearings	<input checked="" type="checkbox"/> Subpoena
<input checked="" type="checkbox"/> Insurance	<input checked="" type="checkbox"/> Trial Material
<input checked="" type="checkbox"/> Investigation	<input checked="" type="checkbox"/> Witness Interview
<input checked="" type="checkbox"/> Legal/Discovery	

Group By Tab

Preview Report

Choose the criteria you want included and click "Preview Report." Check the "Group by Tab" box if you want the results so grouped.

See, Sample Report below:



**Case History Report for Looney, Mary Jane v. ABC Moving, Inc.**

20160815

*Client*

Date	Description	Author
	HIPAA Authorization - Mary Jane Looney	
	Contract - Mary Jane Looney	

*Discovery*

Date	Description	Author
8/15/2017	Discovery	Diane Attorney
9/27/2017		Diane Attorney
11/8/2017		Diane Attorney
12/4/2017		Diane Attorney
12/22/2017		Diane Attorney
5/15/2018	Plaintiff Interrogatories to Defendant	Diane Attorney
5/30/2018	Plaintiff Interrogatories to Defendant	Diane Attorney
6/15/2018	Insurance	Diane Attorney

*Docket*

Date	Description	Author
4/28/2017	Activity: Motions. Assigned To: Diane Attorney, DLD. Motion to Compel Discovery Responses	Diane Attorney
8/2/2017	Activity: Follow Up. Assigned To: DLD. Follow Up: Meds Requested of Snow, MD, John D. for Mary Jane Looney	Diane Attorney
8/25/2017	Activity: Follow Up. Assigned To: Diane Attorney, Client	Diane Attorney
8/25/2017	Activity: Follow Up. Assigned To: DLD. Follow up on letter to client sent on 08/15/2017	Diane Attorney
8/25/2017	Activity: Follow Up. Assigned To: DLD, Client	DLD
8/25/2017	Activity: Follow Up. Assigned To: DLD. Follow up on letter to client sent on 08/15/2017	Diane Attorney
8/29/2017	Activity: Motions. Assigned To: DLD. Motion to Compel Discovery Responses	Diane Attorney
9/5/2017	Activity: Appointments. Assigned To: Diane Attorney, Follow up with Medical Provider Regarding Outstanding Records/Bills	Diane Attorney
9/11/2017	Activity: Follow Up. Assigned To: Diane Attorney, Settlement	Diane Attorney
9/14/2017	Activity: Service Deadline. Assigned To: DLD. Complaint was filed today. Reminder to perfect service of process on all defendants on or before	Diane Attorney
9/17/2017	Activity: Deposition. Assigned To: DLD. Deposition scheduled for	Diane Attorney
9/19/2017	Activity: Follow Up. Assigned To: DLD. Follow up on discovery served on 08/15/2017	Diane Attorney
9/25/2017	Activity: Follow Up. Assigned To: Diane Attorney, Client	Diane Attorney

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