



TrialWorks Version 11.3 announces an update packed full of new Features, Improvements and Performance Updates

## **WHAT'S NEW**

### CASE LIST

Redesigned Case Lists to increase performance. The Case List drop down will now automatically open after typing 2 characters and autocomplete will begin after typing the third character. The Case List drop down will only show cases matching the first two characters typed at a time. Opening the drop down with nothing typed will show every case.

### CASE SEARCH

Case Search has been added to the following: Add to Docket, Call Log, FileIt, Time-keeper, Outlook Add-In, and Office Add-In. This will allow users to search for and choose any case quickly and efficiently.

New Advanced Search options have been added to Case Search. Users are now able to select only the tabs they want to search within or select all to search everywhere.

### DEPOSITION

A new Deposition Notice Letter document, complete with all expected Contact bookmarks, will allow you to create a letter regarding a Deposition addressed to any contact in the case.

### FAST TRACK

TrialWorks now offers the ability to link a Fast Track to specific Statuses. When a case is moved into the Status, the Fast Track will be automatically applied. Additionally, you will have the option to remove incomplete Fast Track items from the Docket.

TrialWorks now allows you to include Document Generation with any Fast Track item, so that you can create your document directly from the reminder. Creating your document will automatically mark the Fast Track item as Complete and be saved to the designated Tab.

### OUTLOOK ADD-IN

Data in the Outlook Add-In is now loaded in the background so that the Outlook UI is not affected. This includes the data initially loaded when Outlook is opened, such as the Case List and data for the Auto Case Matching process, as well as the result from the Auto Case Matching process.

## PLEADINGS

Add the Court Name field to all tabs, allowing you to quickly see which Court each document pertains to.

## PRIVILEGED DOCUMENTS

A new option has been added to TrialWorks to allow firms to hide privileged documents from master cases. This option has been added to every document generation tab, as well as Docket, Notes, Timekeeper and Call Log. If enabled, records marked as privileged will only show in the child case in which it belongs.

## TEMPLATE PACKAGES

Add the ability to merge documents generated using a Template Package into a single document. The single merged document will be saved automatically on the tab designated in the Template Package settings.

# **IMPROVEMENTS**

## CASE LINKS

Master/Child case links have been enabled on the following new tabs: Appeals, Call Log, Pleadings, Subpoena, Timekeeper, and Trial Material.

When cases are linked using Master/Child, the Master case Client and Other Party records should show first.

## CASE LIST

Case List filters selected in User Default Values are now applied across all drop downs. Case List loaded into memory in background on TrialWorks startup.

## CASE SEARCH

Add the ability to search for cases based on a Client's or Contact's Date of Birth.

Change Match text in Case Search.

Optimized Case Search for large case loads.

## CLIENT INSTALL

Include new Office 365 Access Runtime in pre-requisite check.

## CONTACTS DE-DUPER

Add Email, Fax # and Work # to Contacts De-duper grid for easy identification of contact.

## CONVERT TO PDF

Change “Convert to PDF and Send to Docket” to use Word/WordPerfect instead of Adobe Acrobat.

## DOCUSIGN

Updated integration to support TLS 1.2.

## DOCKET

Optimized process of opening and populating Reminders window.

Optimized process of adding a new Docket entry.

## FAX

Add ability to include individual documents in the fax.

## FILEIT

File to Multiple Cases window now loads the filtered Case List.

Added Case Search to File to Multiple Cases window.

## GLOBAL SETTINGS

No longer require admin password to create a new office location.

## INTAKE WIZARD

Add Firm Name security to Intake Wizard.

## MEDICAL

Add a Party field to the Medical detail window.

EMSI-Add option to not import Bills from EMSI automatically.

## NEW CASE WIZARD

Update New Case Wizard to use new Address Book.

Add error handling to Clients and Adverse Party creation process.

## OUTLOOK ADD-IN

Add option to limit the Auto Case Match ability to Active Cases only.

Auto Suggested Cases should load when user enters Case List field.

## REMINDERS

Optimize opening the Reminders window for quicker viewing.

## SPELL CHECK

Add the ability to manage the custom dictionary per user.

## SECURITY MODULE

Allow user to turn off auto-complete in Security Module User List.

Cascade deletions from User List to Security tables.

## TIMEKEEPER

Allow non-admins access to Timekeeper Manager.

## TRANSACTION LOG

Add logging for changes made to Docket items from the Outlook Calendar.

## TRANSFER RECORD

Added Case Search to Transfer Record window.

Transfer Record window follows same filtering as main Case List drop down.

## TWSEARCH

Add new Windowed option for TWSearch, allowing searches to appear in a window within TrialWorks.

## TWSERVICE

Integrate DocuSign download service in TWService (installed as separate service prior to 11.3).

# **ERRORS**

## BOOKMARKS

Sample Data incorrect for Association Bookmark in View a List of Bookmarks.

## CALL LOG

Status Note Code not working properly from Call Log.

## CAPTION

Caption records should not appear in Case Links.

## CASE LINKS

Policy Limits not totaling on Insurance tab.

Costs not totaling on Costs tab.

## CLIENTS

Master/Child cases not showing Defense Case type tab format.

## DASHBOARD

Dropdowns in Detail windows opened via the Dashboard populated with incorrect data.

Error converting DBNull to String on Dashboard Subscription.

## EMAIL

Discovery > More Links not available to be chosen in Email.

File # or Claim # not included in subject line.

Unable to update Category of filed email.

## FAX

Fax form adding duplicate document to Email.

Fax not adding Medical Records documents.

## HEARINGS

Unable to open Hearing Transcripts with very long filenames.

## TAB NUMBERS

Use Numeric Tab Numbers not working.

TabNo field not hiding on Trial Material tab when turned off.

## OUTLOOK ADD-IN

Category choice not carried over to Replies/Forwards.

Attach Documents not showing Discovery and Expert More Links documents.

Case Name in Outlook Add-In not showing at 4K Resolution with 250% DPI.

Case List not refreshing correctly in Reading Pane Add-In when switching emails.

Unable to type in Add-In dropdowns on Windows 10 Update 1903.

Suggested cases not refreshing correctly for new emails.

## SECURITY MODULE

Unable to open Security Module on Access 2010.

## STAMPS.COM

Stamps.com not using saved printer.

Invalid Conversation Token error while using Integration.

## TWAPP

Medical Records do not appear in the TWApp.

## TWSEARCH

TWSearch Date sorting doesn't sort all results.