VERSION 10.7 UPDATES

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Features

User Defined Fields

Create your own custom forms. Manage liability specific details with individually created custom forms. Available from the Intake Cases Manager and the Clients, Other Parties and Case Retainer Tab. User Defined Manager provides Administrative capability to publish and edit forms based on Case Liability and Sub-liability. Add any type of fields to TrialWorks to keep track of additional details you need for your cases. Each case can have 2 Clients, 2 Other Parties and 2 Case Retainer forms for a total of 6 forms.

TWSearch

The new TrialWorks Search indexes all Notes, E-mails and Documents in TrialWorks. New OCR engine scans each document and adds a new text layer. Viewable from the Home Ribbon after setting the URL Path in Global Setting choosing Search this Case or Search All Cases. A webpage is launched allowing the user to choose search terms Specify All Words, Exact Phrase, Any of these Words, or None of these Words or by limiting them to Case Name, File No, Document Tab, Category, Author or Date.

TrialWorks OfficeAddin

The TrialWorks OfficeAddin now provides users with the ability to Save to TrialWorks from any Microsoft Office Application (Word, Excel, and PowerPoint). Utilizing the File Save In TrialWorks from the File Menu, the user provides the File Name, Document type, Case Name, Tab, Category, Author and Party Name and the document is saved in the Tab and Case in TrialWorks

DocuSign

Securely sign and manage documents online from any device with the most widely used e-signature solution. TrialWorks has integrated DocuSign into the Ancillary Tab of TrialWorks. Users can now create documents based on templates utilizing the new DocuSign bookmarks. With a single User account or Group Account, the user is prompted to E-mail the completed document to the recipients. The recipients receive an e-mail from DocuSign, executed the document in the appropriate places and send the completed document back to DocuSign. TrialWorks Users are notified and a Status Check from the Current Case Ribbon will download the executed document and certification into the Additional and More Links fields on the Ancillary Tab.

eLaw Integration

The TrialWorks and eLaw Integration has been expanded from the single offering of NY Supreme Court cases to include: NY Civil Court Cases, Federal Court Cases, and New Jersey Superior Cases. TrialWorks pulls Motions into the TrialWorks Motions/Hearings Tab and adds Appearance dates to the Docket Tab. The eLaw

Appearance category is now added to the detail on the Docket Tab for inclusion in TrialWorks Today. The TrialWorks Service can be installed to automatically download the case information each day.

FileIT – Add option to file to Multiple Cases
Users can now choose option in Case Name to "Choose Multiple Cases". Once that choice has been made, a pop-up appears with the case list to choose multiple cases. File a document into multiple cases.

Template Package
Create groups of templates as single packages to be generated collectively from the Current Case Ribbon. Templates can be combined from multiple tabs and include time entry, docket and Status Note Codes. Each template will generate individually prompting the user for Timekeeper entry, Add Tickler to Docket and Status Note Code

Improvements

- Bookmarks and Custom Report Writer
  - Footer
  - Header
  - Extension/OtherExtension
  - DocuSignSignatureDate, DocuSignSignatureText, DocuSignSignatureInitials, DocuSignSignatureFull
  - CoverageStartDate, CoverageEndDate
  - TeamManager
  - PlaceOfDeath, CountyOfDeath
  - OtherPlaceOfDeath, OtherCountyOfDeath
  - OtherAttyCounty, OtherAttyGender, OtherAttyOpronoun, OtherAttyPpronoun, OtherAttySPronoun
- Caption – Move the Court Division from Third Party to the Court Name/Address section
- Clients
  - Add fields:
    - Extension (designates extension to respond to Complaint)
    - State of Accident
    - County of Accident
  - Workers Compensation – Add multi-rows to Impairment
  - Wrongful Death – Add additional fields for Place of Death, County of Death and Case of Death (triggered from Case Retainer > Death Case) (Liability indicates Plaintiff)
  - With Case Liability marked Defense Service Date, Answer Filed and Extension Date appear
- Custom Report Writer – Add Costs Tab
- Docket – Add "Trial Not Before Date" to Date Info
- Document Category –

- o If a user leaves the Document Category blank the field will be populated with the value from Template Category (requires Template Category to exist in Document Category Library)
  - o Document categories linked to Division will only appear based on the Case Division designation
- eLaw
  - o Improve feature to Import Appearances to add only new items to the Docket Tab
  - o Require new cases being added to CaseWatch include the Plaintiff and Defendant fields to be completed
- Fast Track
  - o Add the ability to continue a Fast Track that has multiple items linked to a previous item
  - o Add the ability to re-apply a Fast Track. Any entries not completed and be recalculated with a new date
  - o Modify Add Fast Track window for more streamlined choices to add Fast Track to current case
- FileIT
  - o Add Case List Filters to allow a user to utilize the same filters from the TrialWorks Case List
- Global Settings
  - o Users
    - New field called Footer to link a graphic file (.jpg or other picture file)
    - New field called Header to link a graphic file (.jpg or other picture file)
  - o Other Settings – New Option to "Generate Conflicts Report for new Contacts. Conflicts report will be created for all new contacts added to an existing TrialWorks Case. Report is saved on Memos/Documents tab
- Insurance
  - o Add field for Coverage Start/End Dates for each policy
  - o Add Contact Field for "Team Manager" (pulls from Contacts with contact type Team Manager)
- Medicals – Add checkbox to designate Certified Medical Records
- MediConnect
  - o Add new options when requesting records to Sort either by Category or Chronological
  - o Update Status E-mail to include hyperlink to records following Microsoft Security Update preventing attachments to e-mail
- Memos – add Party field to Tab
- Motions/Hearings/Appearances
  - o Add Author to the Tab
  - o Add Insert Existing Contact button for Hearing Location
- Negotiations – Add a Link field to attach a document for negotiation
- New Case Wizard – Insurance Defense – Use File # instead of Claim # as default.
- Other Attorney (Other Parties) – Add new fields for Attorney County and Attorney Gender
- Other Parties
  - o Wrongful Death – Add additional fields for Place of Death, County of Death and Case of Death (triggered from Case Retainer > Death Case) (Liability indicates Defense)

- o Date Complaint Filed – Prompt the user to add the date to all Other Parties list in the case
- o Add Fields
  - State of Accident
  - County of Accident
  - Extension (designates extension to respond to Complaint)
- Reports
  - o Case History Report – Add Damages/Liability, Insurance and Liens
  - o Online Records Report with Notes – added DOR (date of request)
  - o Timekeeper Reports – Add options to generate with Activity Code for the following reports: Timekeeper Detail, Time and Expense Report, Time Report for this Case, and Time Report for an Individual Timekeeper
- Ribbon
  - o Settings – New grouping for Financial Libraries that includes Billing Rates, Task Code, Activity Codes and Timekeeper Settings
- Security
  - o Add Template Package to Field Level Security
- Settings
  - o Document Category – add Subpoena
  - o Master Client – Add ability to add QuickNote to all cases by Master Client Will appear in single QuickNote prompt with Case QuickNote
  - o Timekeeper Activity Code – Add new library to document Timekeeper Activity Codes
- Subpoena – Add Document Category to the Detail window and Tab
- Templates –
  - o Activity Code for Timekeeper. Task Code and Activity Code will auto-populate Timekeeper Entry upon document creation
  - o Templates show limited to Division
  - o Added tooltip to show names of Templates for long Template Names
- Timekeeper Settings – add new option to trigger time entry on Hyperlink Click (prompt a user to track time for Document Review). Timekeeper entry is created with explanation populated with "Review of <document name>". Field called Document Review.
- Trial Material
  - o Add ability to Print Links by Category
  - o Add Report by Category that will include Tab, Date and Description
- TrialWorks
  - o Document Detail windows show new options to record the handling of document delivery
    - Regular Mail and Date
    - Certified Mail and Date
    - Receipt: Date Received and Signed By

- Faxed, Faxed To: and Date
- E-mailed and Date *(New)*
- Hand Delivery: Delivered and Date *(New)*
- Add Print to Right-Click Menu for all document links

Error

- Call Log – Pull Author as Default User
- Caption
  - Correct error when adding Judge with a name that contains an apostrophe
  - Modify ADA field to accept 2048 characters
- Case Filters – Correct error when filtering Case List by Subliability
- Case History – correct error when creating documents the date was dropped from the detail window
- Document Generation
  - Correct error when generating an Excel template opened in Word
  - Correct an error when Adding a Status Note Code to a document Detail Window which prevented the Status Note from being added to Notes
- E-mail – Correct error where Additional links for Deposition Tab were not shown
- MediConnect
  - Correct error when sending to request to MediConnect where the Case File # was not passed over
  - Correct error that caused the "Billing" entry not to be created when using the Medical and Billing option to request records
  - Correct error where notes from MediConnect could not be viewed
- Memo – when creating a document with a description equal to 255 characters the document does not get a defined extension (.docx)
- Notes – correct error when running spell-check from a note over 500 characters where corrected spelling was not saved
- Reports
  - Correct error in Fast Track Report that caused entries to appear multiple times
  - Correct error generating Referral Report by Individual
  - Correct error generating Outstanding Task Report – Case Review to limit items not completed
  - Correct error generating the Task Codes Report
  - Modify Production Tracker People Report to show title "People Report"
  - Correct error generating Open Case Report by Attorney
- Template
  - Correct error when generating multiple templates caused the document not to be named
- Timekeeper

- o Correct error when creating a Note from the Home Ribbon the user was not prompted for a timekeeper entry
- o Correct error when timekeeper is called from the Docket and the default hours did not appear
- TrialWorks Today – correct error when modifying an existing entry caused an warning message