

Case Manager

Version 8.0 – Release Notes

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What's New in Version 8.0

Version 8.0 is a major release introducing a new refresh look for Case Manager Web, plus our new Calendar/Scheduler, Outlook sync and important infrastructure updates to keep your email and mobile working reliably ahead of Microsoft's October 2026 retirement of Exchange Web Services (EWS).

Key Highlights

- **Calendar** - your personal calendar with five views and a collapsible mini calendar
- **Scheduler** - for practice managers.
- **M365 Calendar Sync** - appointments now flow automatically into your Outlook calendar
- **MS-graph** - send email using Microsoft's MS-GRAPH API which is replacing the retired EWS Online
- **Case Manager Web refresh** - The Case Manager web client has been modernised with a refreshed visual design.
- **Multi-window support** - Case Manager web now supports pop-out windows.

For detailed guidance on new features, please visit our Learning site:

<https://learning.casemanager.biz/web/WhatsNew/WhatsNew8-0.htm>



New Features

Calendar and Scheduler

My Calendar - your diary, always one click away

- **Five views:** Day, Week, Work Week, Month, and a new **Agenda view** - perfect when you're on the go. Agenda groups your schedule into Today, Tomorrow, This Week, Next Week and Later, with Confirm, Reschedule and Cancel right on each row.
- A collapsible mini-calendar sidebar shows the full month at a glance, with dots on days that have appointments.

Scheduler - for practice managers

- See every consultant and every room on a single grid. The Scheduler only shows the employee-and-room combinations that are actually available, so you're never looking at irrelevant rows.
- Choose from **six layout options:** vertical or horizontal, at Day, Week or Month.
- Drag an appointment to a different consultant or room - the booking moves with it.
- Filter by status to focus on confirmed bookings - hide cancelled, declined or did-not-attend with one click.

M365 Outlook Calendar Sync

Case Manager appointments now flow automatically into your Outlook calendar. Manage everything in Case Manager - Outlook stays in sync.

- Create, reschedule or cancel an appointment in Case Manager and the change appears in the assigned employee's Outlook calendar automatically.
- Each Outlook event includes the appointment details and a direct link back to Case Manager.
- A **sync confirmation icon** on the appointment confirms it has reached Outlook. If anything goes wrong, a banner appears with a one-click resync option.
- **Setup:** An administrator enables the integration once for your organisation under Tools → Options. Each employee then connects their own Microsoft account from their Employee profile → Calendar tab.
- Available for M365 and SSO customers.

User Interface Design Modernisation

The Case Manager web client has been modernised with a refreshed visual design and a new set of personalisation options - so the interface works the way each person on your team prefers, without affecting anyone else.

View density

- **Comfortable** - more breathing room between rows and sections. Easiest to read, great on larger screens.
- **Normal** - the default. A balanced layout that works for most workflows.
- **Compact** - tighter spacing, similar to the desktop client. Fits more on screen at once - ideal for high-volume case management.

Colour palette

- **Warm Parchment** - warm, professional tones. The default in 8.0.
- **Bright Ink** - white background with strong ink-led contrast. Crisp and clean - similar to the current web look.
- **Cool Slate** - cool blue-grey tones. A more enterprise, clinical feel.



Font size

- Adjust the text scale with the – and + controls. Your chosen scale applies across the entire interface.

Table rows

- Enable **Dense table rows** to fit more rows on screen at once - matches the spacing of the desktop client. Useful when working through large case lists or reports.

Preferences are saved per user and per browser - access them under your avatar or initials in the top-right corner → **User Options**. Each team member sets their own; changing yours does not affect your colleagues.

Microsoft Graph Email

Microsoft is retiring Exchange Web Services (EWS) for Exchange Online in October 2026. Case Manager 8.0 completes the migration to **Microsoft Graph** for all email sending - across the web client, desktop client, and mobile app - ahead of that deadline.

What this means for you

- **No change to how you send emails** in Case Manager. The experience is identical - compose, attach, send, exactly as before.
- **Mobile app users benefit immediately** - a long-standing limitation that prevented some organisations from applying Mobile Application Management (MAM) policies to Case Manager on mobile is resolved.
- **Your organisation stays compliant** ahead of Microsoft's October 2026 EWS retirement - email sending from Case Manager will continue to work without interruption.
- Email sending from the web client, desktop client, mobile app, and meeting invite workflows all move to Microsoft Graph in this release.

Administrator: one-time consent required

- To enable Graph-based email sending, an administrator needs to complete a **one-time admin consent** for the Case Manager mail-send app registration in your Microsoft 365 tenant.
- This is a single click - similar to the existing "Verify permissions" step you may have done for Office 365 email setup.
- Your Case Manager representative will provide the consent URL and walk you through the process ahead of your 8.0 upgrade.

If your organisation does not complete admin consent before upgrading, email sending from Case Manager will continue to work using the existing connection until Microsoft's October 2026 EWS retirement date. We strongly recommend completing consent as part of the 8.0 upgrade.

Multi-window support : Pop-out editor

Case Manager now lets you pop editors and tool windows out into their own browser windows, bringing back the multi-window way of working many of you relied on in the Desktop Client. Draft an email while you look up earlier correspondence, fill in a task while you check another case, or spread your work across several monitors, all without closing what you're working on or copying details into Notepad.

- **Pop out what you use most:** Click the new pop-out icon to open emails, invoices and task details in their own window. Reminders, Search, Invoice Generator, Invoice Batch Utility and Import Payments can be popped out the same way.
- **Pick up where you left off:** Anything you've already typed comes with you into the new window, and the main Case Manager screen stays free so you can look anywhere else in the system.



- **No duplicates, no lost work:** If an item is already open in a pop-out window, Case Manager takes you to that window instead of opening a second copy. When you save, the main window updates straight away.
- **See who's editing in real time:** When a colleague is editing a document, you can see it immediately. You're told when the document is free again, or when a newer version has been saved.
- **Safe by design:** You're asked before any unsaved changes are discarded. Locks are released when a window closes, and pop-out windows close themselves if your main session ends.