



Version 9.5 Builds

VERSION 9.5 BUILDS

BUILD 6054

FIXES

| | |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assurance | Within Assurance request – Engagement, the ownership type will only displayed the appropriate options based on contact type. |
| Expenses | When creating an organization engagement in Assurance, the following error message was appearing – “The specified cast from a materialised ‘System.Int32’ type to the ‘System.String’ type is not valid.” This has been resolved and the error message no longer occurs. |
| Reporting | Report exports were not showing column headers. This has been updated to display headers when exporting. |
| Expenses & Disbursements | The receipt allocation fields have been updated to match the same order as the fields in other views throughout the system. |
| Department Schedule | The Department Schedule under Portfolio menu has been updated to not show terminated staff |
| Expenses | Previously, changes made to the VAT rate within receipt or allocation entry were not saving. This has been updated. |
| Expenses | When entering Disbursements, the VAT rate setup in Categories, Etc for the Disbursement Analysis Code was not displaying correctly within expense allocation. The VAT rate percentage will now show the correct amount. |
| Expenses | Description and Date fields were added to the expense allocation dialog box. |
| Dashlets | Dashlets that contain values were not displaying the values when viewing on iOS devices. This has been updated to display the values on any iOS device. |
| Reports | Reports headers were updated to display staff name instead of staff index |
| Reports | Report layout page would not save unless all fields were populated. This page was updated to not require all fields. |

BUILD 6066

FIXES

| | |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Expenses/ Disbursements | Within unit allocation, the unit field now allows for a decimal value up to 2 decimal places. |
| Staff Leave | When printing the staff leave report within the Staff Leave Usage Portfolio the name of the PTO details of the signed in user was appearing on the report instead of the selected staff member. This has been corrected to print the selected staff member’s details. |
| Jobs | The department field was not displaying the correct department within the Job Details page. This field now displays the selected department (if one was previously selected and saved) instead of the first in the list. |

| | |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assurance | When creating multiple engagements and adding multiple services, the system was returning you to the original engagement rather than remaining on the additional engagement. This has been corrected. |
| Assurance | On Assurance Requests, the submit button was remaining after the request was submitted and approved. This has been updated to only show the Submit button when the request is available to be submitted. |
| Assurance | If a job was created via an Assurance request, the job produced an error message when updated related to the 'Job_Updated_by' field. This has been corrected. |
| Expenses | The outstanding line within the expense details was appearing red even after all was allocated. This has been updated to only appear red when items are outstanding. |
| Timesheet | First day of week was appearing incorrectly. This has been updated to display the accurate information. |

BUILD 6075.41787

FIXES

| | |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Search (Staff, Client and Contact) | Set Default selection on VM Load. The search screens should always show the cursor in the search field ready for the search to begin without the user having to click on the field to commence the search process. (Defaults to the Top search box) <i>-Suggested by Mike Caltagirone</i> |
| Tallie Integration | Standard Tallie import and validation routines modified for the new expenses module. <i>-Suggested by Brad Podzius- Zen Desk ticket 6030 for Blum Shapiro</i> |
| Billing | Billing Guides and Unposted WIP still referencing old Expense Table. <i>-Reported by Tony Doyle</i> |
| RD Cheques | Refer to Draw Cheques rounding to 0 decimal places. <i>-Reported by Andrew Hambly (fix in 9.3,9.5 and 9.6)</i> |
| SIC Code and Industry | Make SIC Code dependent on Industry in Assurance. If you add the SIC Code field to the selected fields list in assurance request set up, the Industry field is added automatically. <i>-Suggested by Adam Morgan</i> |
| Expenses | If using the Expense posting setting as Today's date (the current date), the date used when posting will be today's date unless today is after the period end date, then the period end date will be used. (e.g. If the period end date is 31/07/2016 but today's date is 01/08/2016, this setting will use 31/07/2016 for the posting date). <i>-Reported by Bober Markey Fedorovich</i> |
| Emailing | When right clicking on an invoice and clicking Email fee, when entering two email addresses in the BCC field, separated by a semi colon, the second BCC'd email address was receiving the email, but the email address entered first was not. <i>-Reported by Blum Shapiro- Zen Desk 6001</i> |

Reports

A report search field was added to both the view reports page and the reports admin screen. You can click on the individual folders and search within them, or click on the standard reports folder, and the search will be conducted through all reports available, in all folders. The Search field in the reports admin page will search all reports and suggest reports in a list as you type.

-Suggested by Adam Morgan.

BUILD 9.5.6092.20908

FIXES

- Collection Details Won't load attachment** *VS: 4598.* Collection details not loading an attachment; Navigate to a client's DRS, right click on invoice and select collection details. Practice Engine Error message was received when user tried to add attachment.
-Reported by Michelle Jenkins- Zen Desk ticket 6328 for Blum Shapiro
- Editing Posted Exp/Disb lines** *VS: 4642.* On a posted allocation, prevent edit if the item's status is not Active.
-Suggested by Andrew Hambly
- Alphabetize the Manage Menu** *VS: 4584.* All Manage Menus in the system have been made to list items alphabetically.
-Suggested by Michelle Harris for Clement Rabjohn
- View Receipt image in Claims when status not Active** *VS: 4572.* Allow Receipt Image access from within Claims when status is changed from Active. When using expenses in 9.5, user was unable to view the image on the receipt details of the receipt once the claim's status was changed from Active.
-Suggested by Ros Hambly
- Export Data Function Bug** *VS: 4574.* Export Data Function fixed; James Gemma at Blum Shapiro found that when exporting the Aged WIP by Office & Management report to excel, they were only receiving the total line, no other details.
-Reported by James Arthur- Zen Desk ticket 6239 for Blum Shapiro
- Removal of MANJOB system option** *VS: 4619.* Errors were being encountered when creating a WIP transfer in a bill or a WIP Journal. This was linked to jobs without services being listed in the service drop down. A job without services should not show in the service drop down.
-Reported by Andrew Hambly
- DacPac option for unique StaffCode** *VS: 4570.* DacPac option added to ensure StaffCodes are unique.
-Suggested by Andrew Hambly

Ensure Membership Show/Hide based on Role Provider, not Authentication VS: 4585. On a system, do an install with Windows Authentication, but using "Simple" role provider. You should still be able to manage membership of who is in what role. Now do an install with Windows Authentication, but using "Windows" role provider. You are no longer able to manage membership of who is in what role. Only hide Membership Management if using Windows Role Provider, not Simple Role Provider.
-Suggested by Ryan Posener

Inactive Services shown in Assurance VS: 4571. Inactive Services were making their way into the Services list in Assurance. This has been corrected, so that Services that are made inactive by removing the "applies to" checks, are not available for the user to select within assurance.
-Reported by Michelle Harris

Changing Expense Header was updating all headers VS: 4640. If you entered an expense claim with multiple lines on multiple clients and you went to raise a bill on one of those clients and choose to include unposted WIP it will post some lines within the expense claim. If you then submitted the claim all of the lines were marked as complete and then get approved and posted, so the lines posted in the bill end up posted twice.
-Reported by Andrew Hambly

Unit Based allocations issue VS: 4649. When adding a unit allocation to an expense, there was always an outstanding amount in the totals grid. This turned out to be a rounding issue.
-Reported by Victoria Stephenson

DacPac items to be added VS: 4501. Standard PELerts and Import Types were added to the DacPac.
-Suggested by Michelle Harris

Bulk Fee printing VS: 4599. In IE if you went to admin, taskpad, bulk fee printing, and selected any number/combo of fees the window popped up saying that the report was ready but there was no way for the user to print the document or download the document as a pdf to do so. It worked fine when doing a single print from the client DRS screen. Chrome handled this just fine.
-Reported by Ben Edwards-Zen Desk ticket 6339

BUILD 9.5.6121.38724

FIXES

Assurance button Disappearing

VS: 4653. When navigating to Assurance > New Request and adding contact details and clicking on the engagement page, once the mandatory details had been entered and you'd saved the details, the submit button was disappearing from view
-Reported by Victoria Stephenson

Invoices Print with Statements

VS: 4643: Cassons were unable to print Invoices with their Statements from the DRS page.
-Reported by Michelle Jenkins- Zen Desk 6309 (Item 15)

Edited Unit Based Allocations not saving VAT changes

VS: 4650: When adding a unit allocation to a claim and wanting to change the Tax amount on it, the Tax change wasn't being saved by the system. The Tax amount should be editable and easily saved by the user.

-Reported by Victoria Stephenson

Inactive ORG and Client in Expenses

VS: 4683: If you have an inactive organisation (in PEWC the organisation isn't active), when pulling up the client details the status says Internal Client (organisation notes Active) and there are no drop down choices to inactivate the client. However the Internal client with Inactive Organisation was still allowing the inactive client within expenses.

-Reported by Michelle Jenkins- Zen Desk 6436- Bober Markey

Bulk Fee post in Portfolio

VS: 4682: If transaction setting "restrict to current period" is ticked, then you were still able to post bills with dates outside the current period, when selecting a fee in bulk post from the fee portfolio page.

-Reported by Tony Doyle

Report and Posting updated to use new description in expenses

VS: 4723: The new description field added to the allocation details within an expense claim needed to show on the print out, the posting pages and within the grid as the user sees it on the claim view.

-Reported by Victoria Stephenson

Job Screens default to Active refiner

VS: 4720: The jobs list screens weren't all defaulting to the Active refiner.

-Reported by Michelle Harris

Assurance VAT Rate not kept when requesting a new engagement

VS:4713: If you set the VAT Rate in Admin, Assurance Request Admin, when you create a new contact or client request through assurance, the VAT is defaulted to the VAT set up in assurance request set up page. However, if you click on the request a new engagement button from a contact, then the default VAT Rate isn't shown instead it shows "Please Select".

-Reported by Beth Keys- Larking Gowen- Zen Desk Ticket 6617

Memo field addition

VS: 4712: A description field was requested in the allocation side of an expense claim, for each allocation line.

-Requested by- Blum Shapiro and Clement Rabjohns- Zen Desk Tickets- 6279 & 6637

Assurance details could be edited once validated

VS: 4727: If you navigate to assurance request admin and find an approved client request, one that's already validated, if you clicked on the client name you were then able to make amendments and click save.

-Reported by Ben Edwards- Zen Desk Ticket- 6739

Expense grids showing NET amount in Amount column, not Gross amount

VS: 4726: The Amounts shown within the amount column in the Complete, Approved, Rejected and Posted Expense grids were showing the NET amounts for the expense claims not the Gross amounts.

-Reported by Victoria Stephenson

Terminated staff appearing in System Administration

VS: 4718: When you navigate to Admin > Security Administration, terminated staff members were appearing in the search boxes and grids.

-Reported by Michelle Harris

Disbursement import misses job details

VS: 4703: When completing a Disbursement Import if the job included was closed, instead of alerting the user to the issue and producing an error, the disbursement went ahead without issue, but inserted a NULL for both service and job. If the job was active for an internal client then the import didn't populate the client code, index service code or job_idx in tblExpenseAllocation.

-Reported by Tony Doyle

Disbursement batches default set to Hereford for all new batches

VS: 4186: The system was hard coded to create all new batches with the Hereford office- this was set in the typescript file. When you tried to save a batch in a system with no Hereford office present, an error was produced.

-Reported by Adam Morgan

BUILD 9.5.6135.31048

FIXES

Use New Report App Viewer for built-in reports

VS: 4761: Job Print, Expense Print, replace any calls in the base datacontext to download/print PDF file.

-Suggested by Andrew Hambly

Request a New Engagement from contact

VS: 4860: When navigating to a contact's client page, and clicking on "Request a new engagement", once the Assurance page opened to enter client details on the form, if you entered a new name into the client name field, and pressed TAB, then the whole form Greyed out.

-Reported by Tony and Ben for Edwards and keeping – Zen Desk Ticket 7130

Job details from Assurance not saved

VS: 4691: When jobs were set up in assurance, not all the details were being saved/pulled through to the job details once the client had been approved. For example: Job Estimate, recurring/frequency and Office.

-Reported by Brad Podzius

FIXES

Inactive Offices Appearing for selection in Add Receipt

VS: 5160: When adding a receipt to a Disbursement batch, inactive offices were being listed for selection. You were able to select the office, save the receipt to the claim and submit it.

-Reported by Victoria Stephenson

Add post to date drop down in posting pages

VS: 4895: There used to be three options available when posting expenses and disbursements; Use Expense Date, Use Period End Date and Use Today's Date. These have been added.

Reported by Tony Doyle for Edwards and Keeping – Zen Desk Ticket 7174

Admin Attribute pages-changing selected attribute position

VS: 4774: When in Attribute pages in Admin, if you clicked on an attribute type, then highlighted a selection from the “selected” box on the right hand side of the screen, the arrows were not allowing you to move the selection up or down.

-Reported by Victoria Stephenson for Burton Sweet – Zen Desk Ticket 7046

In/Out details page from Staff Task Pad

VS: 4920: When in Staff out of Office and trying to edit an item in Chrome or Firefox nothing was saved, and in IE, the changes weren't shown unless the pressed F5 to refresh the page. “This function is Deprecated, it will be removed in future versions, please discontinue use” was also removed from the top of the page.

-Reported by Michelle Jenkins – Zen Desk Ticket 6716

Client Reports menu check two permissions instead of 1

VS: 4972: The reports menu under clients checks both “ClientReps” and “ContactReps”, when it should only check for “ClientReps”. A permission error was fixed to correct this.

-Reported by Sunil Shah at MGRWK

Search Grid column buttons

VS: 4948: When in the search screen, the arrow button beside the column button was a bit problematic- if you clicked directly on it would take you straight to the client's dashboard, and if you clicked anywhere around it you were then able to select from the drop down menu.

-Reported by Andrew Hambly

Receipt capture Orientation

VS: 4947: When capturing a receipt image on your mobile phone device, the image was being uploaded in the incorrect orientation. Once save, if you downloaded the image, it was also then downloaded in that same incorrect orientation.

-Reported by Andrew Hambly

RFP Reversals being reversed in previous months

VS: 4975: When adding a receipt, choose to create an RFP and post it, changing the default VAT amount, and run the period end on the system. Afterwards, add an RFP invoice to the same client you added the receipt to with normal VAT rates applied. Go to the client DRS transaction page and allocate the receipt to the RFP Invoice. If you then check the RFP receipts on the client DRS transaction page, there should be the initial RFP receipt, and RFP receipt reversal and a new RFP receipt. If it's working the reversal and the new RFP receipt should be dated in the current month.

-Reported by Andrew Hambly

Treeview controls giving errors when zoomed in in chrome

VS: 4990: If the zoom level was set to level 125% in a Chrome browser, if you opened either the deposit or timesheet creation and posting pages, you would get an error message.

-Reported by Andrew Hambly

Unit based expenses getting more than 2Decimal Places

VS: 5042: If you set up a mileage disbursement rate and added a unit based allocation to an expense claim using that disbursement rate, the interface was correctly showing the 2 decimal places, but if you looked in tblExpenseAllocation the ChargeAmount didn't show the amount to 2 Decimal Places.

-Reporting by Andrew Hambly

Disbursement Import not tagging invoices to staff and office

VS: 5012: If you imported a disbursement batch, the invoices show in the batch. If you then abandon the batch, the invoices listed in the batch do not appear in the unattached invoice list tab.

-Reported by Andrew Hambly

Inactive Offices appearing for selection in Add Receipt dialogue

VS: 5160: when adding a receipt to a disbursement batch, inactive offices were being listed for selection.

-Reported by Vicky Stephenson

BUILD 9.5.6172.31178

FIXES

Edit disbursements

5091: The ability to edit Disbursements in WIP; Once a disbursement has been created go to the client's task pad and click on edit WIP transactions, and the disbursement should be showing under the corresponding service.

-Suggested by Tony Doyle

Inactive offices appearing for selection in Add Receipt

5160: Inactive offices were appearing for selection in expenses when you were adding a receipt to the expense claim. You were able to select the office, save the receipt to the claim and submit and post it.

-Reported by Vicky Stephenson

Disbursement code not showing when set up from Categories

5099: Any new disbursement code added within categories didn't show until the user either cleared storage, or logged out and back in the system.

-Reported by Vicky Stephenson

Transferring Receipts

5084: You were able to transfer a receipt to clients with a different currency- this should never have been possible.

-Reported by Tony Doyle

Cannot print a Disbursement Batch

5083: The user was unable to print a disbursement batch using the print button from within the batch itself.

-Reported by Ben Edwards and Michelle Jenkins

Disb Import, Non-chargeable and Internal client imports not working

5080: When importing a disbursement and using a non-chargeable service and internal client, an error grid message was appearing and the details weren't being added to the import correctly. The details in the import sheet were correct but the system wasn't recognising them, instead leaving fields blank from the import.

-Reported by Tony Doyle

Disb rates not filtering to Unit Allocation screen

5059: When setting up a new disbursement in categories, the disbursement rate wasn't being pulled through when adding a new unit allocation using that disbursement code. Instead, the incorrect rate was being shown for it.

-Reported by Vicky Stephenson

Disb Headers not deleted when batch abandoned-Prompt for deletion required

5090: When abandoning a Disbursement Import, the records were not being removed from the tables also, and the invoices were being listed for deletion. It was decided to ensure that when abandoning an import, all entries were removed from the tables, but that a pop-up message would appear asking the user if they wished to delete the associated receipts or just remove them from the batch and save them to the unattached invoices list.

-Reported by Michelle Jenkins for Milsted Langdon

Job sort order; first sort not kept when second sort applied to jobs grid

5055: When in All Staff Jobs page, if you applied a sort to one column followed by a second, the first sort was lost.

-Reported by Brad Podzius

Report layout Admin SP bug

5255: A correction to the pes_Web_Report_Layout_List SP, as it was causing duplicate entries in the list where there were multiple entries in report layouts with the same report URL.

-Reported by Ben Edwards

Timesheet Tables error when drilling into client WIP

5243: When going into a client's WIP and clicking on the total from the view all screen, then the posted amount the user was getting an error message.

-Reported by Tony Doyle

Leave approval when system in lock down

5178: Leave that's requested when the system is in lock down for month end, shouldn't be able to be posted. The leave wasn't showing up on the timesheet, and so no trace was found, but the leave was successfully being posted non-the-less.

-Reported by Michelle Jenkins

BUILD 9.5.6184.31306

FIXES

Incorrect Analysis code on Disbursement Import is left blank

5271: If an incorrect Analysis code was entered in an import document for disbursement batches, it was being successfully imported but the expense code field in the allocation was left blank. The user was then able to submit and post the batch, which then meant that without the analysis code, the WIP couldn't be used.

-Reported by Tony Doyle and Michelle Jenkins

Missing notes on returned request information

5272: When in the validation screen of assurance, there was no longer a list of notes/history of submissions and returns, along with dates and times, and staff members, as there once was in version 7. This has been rectified, and now within assurance set up there is a box at the top containing these notes.

-Reported by Tim Johnstone on behalf of Larking Gowen

No colours showing in the Manager Diary Legend

5285: If you went to the staff manager diary from the staff menu and task pad, and clicked on the Legend button, no legend colours were showing.

-Reported by Vicky Stephenson

Managers diary; colours missing from entries

5089: The legend colours were not being applied correctly to entries within the manager's diary that had hours added. This was an intermittent problem.

-Reported by Brad Podzius

Staff creation windows Authentication

5330: When using windows authentication with groups managed in PE and setting up new staff, it assumes because it is windows that the groups are managed in AD, so they were not available in the setup page.

-Reported by Adam Morgan

BUILD 9.5.6185.40293

FIXES

Deloitte Bermuda Custom Fields for Integration

A fix added by Andrew to include the custom fields needed for Deloitte's integration.

Incorrect list button for disbursement view

5173: In unattached invoices for disbursements, when creating and saving it, the return to list button said "Expense List" instead of Invoice list/back to list. This was changed to "back to list".

-Reported by Vicky Stephenson

Expenses and Save and Allocate buttons

5279: The save button in expense receipt view was changed to offer the user the option to either save, which saves and closes the receipt, or Save and Allocate which will allow the user to go to the allocate screen from the receipt. This was decided after reviewing the actions of the save button on the receipt tab and the allocation tab, and how they redirected the user after clicking either save button- it was found that they took the user to different places in the system. This would simplify the action for the user.

-Reported by Vicky Stephenson

Receipt Currency and Foreign Currency added to expense receipts and disbursement invoices

5286 When in expenses, you can select the foreign currency and change it from the defaulted currency. Once you do, a Foreign amount field is shown for you to enter the amount you're claiming that is in a foreign currency.

-Reported by Andrew Hambly

FIXES**Expense code drop down when importing a disbursement**

5332: If an import was completed using the incorrect expense code, when re accessing the imported disbursement batch, and opening the allocation dialogue to change the incorrect expense code, no valid expense codes were being listed. This was corrected, so that the user didn't need to re-select the job for the valid expense codes to be loaded.

-Reported by Vicky Stephenson

Jobs in Billing

5317: When using the "add and auto allocate" option on the WIP screen when doing a fee in billing. It was allowing you to change a job but didn't refresh the service that went against the job.

-Reported by Michelle Jenkins for Deloittes – Zen Desk Ticket 7746

Space in Import spreadsheet causing duplicate receipts

5333: If the user had a space in the reference field of the disbursement import spreadsheet, this was then resulting in the receipts being duplicated. The user would have two of the same receipts.

-Reported by Tony Doyle – Zen Desk Ticket 7979

Disbursement Import- £ sign not showing correctly

5316: When doing a disbursement import, if you had a £ sign in the import spreadsheet, once imported the pound sign would be changed to a question mark in a box. This is because the csv file isn't encoded using the standard web encoding of UTF-8. Excel is saving it as ANSI encoding. The only way around it currently is to open the csv file with notepad and pick the UTF-8 encoding from the drop down next to the save button on the save as dialog. If you do that and then open it up again in Excel it stays in UTF-8. If you do that with the template csv, you only have to do it once.

-Reported by Michelle Jenkins for Thomas Edmunds at MGRWK – Zen Desk Ticket 7802

FIXES**Restriction of Jobs to Services with Valid expense/activity codes**

5293: On the Expense allocation screen, restriction of the jobs returned to those services that had valid expense/activity codes, was implemented.

-Reported by Tony Doyle

Grouping, Sorting and Filtering options not saving

5442: When defining a report macro, the Grouping, Sorting and Filtering options are not saved.

-Reported by Mike Caltagirone

Billing Guide date format

5407: The billing guide date at the bottom of the page in UK systems seemed to be in American format.

-Reported by Michelle Jenkins on behalf of MGR – Zen Desk Ticket 8221

Macro Params not appearing

5307: At BPB they noticed an issue with Macro Parameters where they didn't appear correctly in the dropdown, but they did when just running the actual report.

-Reported by Adam Morgan on behalf of BPB

Date Parameter field length

5292: Whilst in reports view, and testing another issue, it was found that the reports date parameter fields were very wide. This was reduced making the UI easier.

-Reported by Vicky Stephenson

Parameterised SQL query parameters not being passed the focused entity

5400: When running a client report from the client reports menu option, if the report had parameters and the parameter was a SQL parameterised query then the selected client wasn't being used in the query.

-Reported by James Arthur

Roles on Tasks overwritten by the manager on the job

5427: When setting up a job template from job template definitions from Admin, if you set a partner, manager and in-charge on the client along with roles on tasks, when you then created the job on the client using that template, the roles set up on the tasks were being overwritten and replaced with whoever was set up as the manager on the job from the job template settings.

-Reported by Vicky Stephenson

Expenses unit based allocation

5346: When in Unit Based Allocation, the charge codes available were all charge codes that had a disbursement rate. This has now been restricted to valid charge codes, against the service that the job belongs to.

-Reported by Ben Edwards

Select all and Clear all option in expenses

5352: A select all and clear all button was added to the expenses and Disbursements posting pages.

-Reported by Tony Doyle

Job Templates- PTR, MGR, IN-CHG

5339: When creating a template job, the system didn't populate the partner/manager/in-charge from the template- this was changed to use them so long as they weren't zero.

-Reported by Tony Doyle

Retainers View

5389: When a client had a long list of retainers and right clicked to select "refund retainer" from the mini menu, nothing seemed to happen. The problem was that the dialogue for refunding the retainer was being loaded/shown at the top of the page, where the user couldn't see it. To fill it in, they would have to scroll to the top of the page. This was changed to have the dialogue follow the user's click, and load up wherever the user was on the page.

-Reported by Tony Doyle on behalf of BPB

Jobs not appearing in Expenses and Disbursements drop down

5328: If a new service was added in admin > categories > special categories > services > recoverable services, and you added the service to a client, making it active, then created a job using

that service, if you went to either expense claims or disbursement batches, and tried to use that same job, the job wasn't being listed. This was corrected.

-Reported by Vicky Stephenson

CreatedBy not being populated

5446: The tblClientServiceChanges was not updating the CreatedBy, when you made any changes to a service on a Staff user.

-Reported by Edwin Gomez on behalf of PBMares – Zen Desk Ticket 7689

BUILD 9.5.6229.24746

FIXES

Supplier VAT Rate not being remembered

5556 When adding a supplier to a receipt and changing the VAT rate then saving a receipt, when adding another receipt using the same supplier, the VAT rate wasn't being saved, instead it defaults to the first in the list. When applying a VAT rate to a receipt, the system remembers the VAT rate you applied when using the supplier. This VAT rate should then be automatically defaulted to when returning to receipt entry and entering that same supplier.

-Reported by Vicky Stephenson

Changes to expenses receipt validation to highlight receipts with no allocations

5523 When entering receipts to a claim, receipts without an allocation attached are highlighted on submit, to alert the user to the exact problem, as unallocated receipts cannot be submitted.

-Reported by Vicky Stephenson

Dashlets not alphabetized in the select dashlets list

5492 All menu items were not showing alphabetically. This was the case when adding dashlets to a dashboard, the dashlets were not being listed in alphabetical order. This was also the case within the task pad menus, which made it very hard to find specific pages.

-Reported by Vicky Stephenson

Job Details Update Service call

5612 The service call to update Job Details was not calling the Stored Procedure, it was instead just updating the record.

-Reported by Tony Doyle

Job names not unique when created in Bulk

5613 When within Bulk Client Admin page (Admin > Task Pad > System Maintenance > Bulk Client Admin), you could add the same job name to the client multiple times. This has been corrected. An error message is now produced informing the user that the client already has a job with the same service and job name on it.

-Reported by Tony Doyle

Bulk Client Admin Adding Jobs- error message to contain the client name and service

5666 We made a change to the error messages to ensure they were more helpful to the user. If the job's service wasn't engaged on the client when trying to add the job to the client within bulk client admin, then the user would get a complicated error message. The message itself was telling the user that the service on the job wasn't engaged on the client that they're trying to add the job to. The Client Name and Service were included in the error message to inform the user of this.

Please note that it was then decided to automatically engage the service on the client if it was missing when adding jobs in bulk to clients within the system.

-Reported by Andrew Hambly

Expenses Date sort not working in Others Tab

5662 When within the expenses grid in the Others Tab, if you clicked on the Claim Date header in the grid to sort by date, nothing was happening.

-Reported by Edwin Gomez – Zen Desk Ticket 8761

Web Reporting Usage

5661 The tblWebReportChanges table was no longer being populated. In version 8, this table would record the history of reports run by staff.

-Reported by Ben Edwards on behalf of Foxley Kingham – Zen Desk Ticket- 8670

Rolling Jobs doesn't create the correct budget is not using actuals

5635 When using the Bulk rollover facility, if you created a schedule and had the sync budget turned on to create the budget, roll the job over and take off the create automatic budget, then rolled the job, you would have the correct schedule but the budget was blank. So if the job is rolled with the schedule kept/calculated (anything other than cleared) and the budget isn't set to automatic and the existing job has the budget/schedule sync turned on, then the budget will be built from the schedule.

-Reported by Michelle Harris

BUILD 9.5.6242.25100

FIXES

New staff member timesheet default style

5683 When creating a New staff member, the default timesheet style was being set to weekly even if the transaction setting was set to daily.

-Reported by Tony Doyle

Delete option not clearing cache on client industry

5507 When creating then deleting a category for the client industry field, the value deleted was still showing as a drop down option.

-Reported by Tony Doyle on behalf of BKL – Zen Desk Ticket 8397

Zero Bill Print not working

5682 If you selected to print the zero bill at the point of confirmation of a fee, you were instead taken back to the client's dashboard and the next mouse click would result in the print out.

-Reported by Tony on behalf of Edwards and Keeping – Zen Desk Ticket 8342

Job Templates flat rate not converting on new clients

5762 When creating a new client if you added a job with a flat rate assigned to it, once the client was approved and created, the job you applied no longer had the flat rate showing, it instead showed the standard rate.

-Reported by Michelle Jenkins on behalf of Muellor Prost – Zen Desk Ticket 8886

Date picker in my portfolio schedule in chrome not allowing manual date to be entered

5643 An error was received when clearing the current date showing in my portfolio schedule or trying to edit the date manually.

-Reported by Michelle Harris

Highlighting of receipts in expense claims when trying to submit without and allocation

5505 When a receipt has no allocation attached to it, and you try to submit a claim, the system should prevent you from submitting it, which it does, however you should also see the receipt without the allocation highlighted so you can easily find it and rectify the issue. This was fixed.

-Reported by Vicky Stephenson

Service not refreshing on the job when changed in billing

5317 When using the “add & auto allocate” option on the WIP screen when doing a fee, if you changed the job, the service wasn’t refreshed to the service that is attached to the newly selected job.

-Reported by Michelle Jenkins on behalf of Deloitte- Zen Desk Ticket 7746

Add and Auto allocate in fees producing wrong values

4548 This problem was to do with credit or zero lines in the bills WIP allocation.

-Reported by Andrew Hambly

Sort job template names alphabetically within assurance request

4543 Job template names within assurance requests to be listed alphabetically.

-Reported by Melissa Seahorn on behalf of BPB- Zen Desk Ticket 5975

RFP Receipt reversals being reversed in prior months

4975 If you were to add a receipt to the system, post it and create an RFP receipt changing the default VAT amount, then run the period end, if you then added an RPF invoice to that same client but with the normal VAT rates applied and navigated to the clients’ DRS transaction page and allocate the receipt to that RFP Invoice it was found that the RFP receipt reversals were being reversed in prior months. Now the fix has been applied, if you were to check the RFP receipts on the clients’ DRS page, there will be an initial RFP receipt, and RFP receipt reversal and a new RFP receipt showing, and the RFP receipt reversal and the new RFP receipt are dated in the current month instead of the prior month.

-Reported by Andrew Hambly

BUILD 9.5.6253.26444

FIXES

Cannot add reports to a macro if they have drop down parameters of any type other than int.

5934 It was found that if you tried to add a report to a macro that had drop downs of any other type than “int”, then an error message was produced. This is now fixed and an edit dialogue appears instead.

-Reported by Andrew Hambly

Staff tab record changes not saving

5906 When making changes in the staff details pages (Staff Tab), you were unable to save the changes made. When clicking apply a red warning message was appearing at the bottom of the staff tab page: “The telephone number must be provided”. The missing value was to be found in the Others tab, not the Staff Tab. Valid information was added to the validator messages to ensure that the users are directed to the missing data by telling them which tab it can be found on.

-Reported by Michelle Jenkins on behalf of Deloitte- Zen Desk Ticket 6051

FIXES

Week Buttons in Department Schedule refreshes page and filters (EDGE)

5899 Edge users were finding that when in the department schedule, when they used the forward and back buttons, the whole page was refreshing which then reset any filters and dates you had set on that page.

-Reported by Brad Podzius on behalf of BPB

Creating jobs from a template- Blank TypeDesc

5987 Here a bug had been found when creating new jobs from a template. In the section towards the end of the pes_Job_Create_From_Template SP, the system would insert a row into tblPortfolio_Job and set the type description as blank. This should have been populated with the type description from tblTaxReturnTypes.

-Reported by Brad Podzius on behalf of TSS- Zen Desk Ticket 9359

My Portfolio Schedule- Automatic scheduling not inserting the hours in estimated hours field

5663 If you created a job with tasks, allocated yourself as the staff member on a task entering an estimated hours amount, and ticked the automatic scheduling box and entered a due date, the incorrect hours were showing.

-Reported by Michelle Harris

Permissions Caching

4242 When making permissions changes in security administration, it was taking half an hour for the changes to show to the user. There is now Clear Server Cache button available within the Security Admin page to allow a user to ensure the changes are shown immediately by the system.

-Reported by Vicky Stephenson

Job status not saving

6016 If you were to change the job status on a job on a client and click the save changes button, the change wasn't being saved.

-Reported by Vicky Stephenson

Bulk Client Admin-Job Creation- offer the user an option to engage services on clients if not already engaged

5948 There is now a check box on the first page of job creation in bulk client admin to engage services on clients who don't already have the service engaged currently, to allow the jobs to be added to the client. If the tick/check box is not set, then the system will go ahead with the job creation, but list all the clients in red in the review log tab, as a record of the clients that did not have the job successfully set up.

-Reported by Michelle Harris

Staff Budgets Page Permissions

6073 It seemed that whether or not you had the StaffBudgetsEdit or the StaffBudgetsView permissions set, both would allow editing of the staff budgets. This was fixed, and the StaffBudgetsView permissions ensured a read-only view for users.

-Reported by Tony Doyle

Currency changed on imported disbursements to the first in the list

6403 When importing disbursements, if you opened up the receipts that you had imported to view the detail, the currency had been changed from the currency set on the system, to the first in the currency drop down list. This has been fixed to ensure that the currency is not changed on import.

-Reported by Vicky Stephenson

Department Schedule Behaviour

5990 When using either Chrome or IE and scrolling back and fore through the department schedule weeks, not all the scheduled items were showing.

-Reported by Tony Doyle on behalf of BPB- Zen Desk Ticket 9253

Close/Cancel button for emails viewing screen

6297 It was suggested that a close or cancel button was needed from the emails viewing screen.

-Reported by Tony Doyle

Leave not being displayed in the correct colours- Department Diary

6238 All leave, submitted, approved or posted was being displayed as orange rather than using the colours displayed in the legend.

-Reported by Michelle Harris

Deleting Job Roles- recording history

6445 No deletion details were being logged in tbl.job_history, when deleting job roles.

-Reported by Michelle Jenkins on behalf of EKSH – Zen Desk Ticket 9818

Expenses-Able to save a blank receipt

6379 If you opened up your expenses and added a new receipt, you could click save and the receipt was saved without issue even though you should always have to have one of three details in order to save a receipt: A supplier, an Image/document, or the Amount.

-Reported by Michelle Harris

BUILD 9.5.6305.20771

FIXES

Billing Issues

6482 When creating a draft fee for a client that has a billing client applied to them, it was found that you were unable to bring in the WIP from the billing client. If you selected the “add another client” option on the WIP tab, and selected the billing client, then no WIP was being brought through.

-Reported by Brad Podzius on behalf of HAW

A way to clear incorrectly allocated VAT Receipts

6380 A client requested a way to clear payments that had been incorrectly allocated, from the emailing list in a client’s DRS pages, on the RFP Receipts tab. You can now right click on a receipt, and select “mark as printed” or Mark as “unprinted” to remove or include the receipt in the emailing list.

-Reported by Tony Doyle on Behalf of Alistair Haynes, Milsted Langdon – Zen Desk Ticket 9716

Mark as Printed Button

6544 The mark as printed button was re-added in the dunning letters screen in credit control.

-Reported by Ben Edwards

Removal of White lines when group of receipts highlighted in a claim

6476 It was found that when a group of receipts was highlighted within a claim, that white lines were showing across them, and they were cutting through detail on the grouped receipts. These were removed.

-Reported by Victoria Stephenson

BUILD 9.5.6313.38902

FIXES

Credit Note Confirmation

6481 Credit note confirmation to populate WIP restored fields in collection details. This is seen per transaction setting in collection details from the Client DRS Transactions page.

-Reported by Andrew Hambly

Edge Print button added to report viewer

6441 Edge didn't really support printing in the same way that IE and Chrome did, by automatically downloading the report and allowing the user to print upon opening. A print button was added to the report viewer.

-Reported by Michelle Jenkins on behalf of Foxley Kingham – Zen Desk Ticket 9731

Updated errors on Tax Jobs when added in Assurance

6494 An issue was encountered with an "updated by" error message, when editing and saving information on a job that was added within assurance, once successfully added and set up on the client. If the first thing you did on the tax job was to make changes to the Budgets or Task, then you would receive an error message: Job_Updated_By or Task_Updated_By.

-Reported by Brad Podzius

Issues with the submit button in assurance

6546 A problem with the submit button within assurance appearing and disappearing once you had added an engagement to create a client- once you added services then added some jobs, the submit button wasn't showing when still on the jibs tab. You needed to move from the jobs tab for the submit button to appear.

-Reported by Victoria Stephenson

Running Macros Error

6440 If you had a parameter loaded with a hard-coded list for the drop down, whilst it worked as a report and the drop down looked to be ok, (even on the parameter definitions screen), when you later linked the report to a macro, the drop down did not appear correctly- it only gave the very first hard-coded item from the list.

-Reported by Michelle Jenkins on behalf of Deloittes – Zen Desk Ticket 9676

BUILD 9.5.6338.15104

FIXES

Mopping up WIP

6638 It was found that in version 9, there seemed to be no way of mopping up the WIP as there was in version 8. For example, if you had one line of 100 and another of -100, in version 8, you could create a zero bill and just confirm it. In version 9 the user would get the error “the value of write off is less than or equal to zero”. You couldn’t get around this by going to the fee portfolio and selecting “WIP Allocation”, which should just allocate debits and credits, as instead, it created a zero bill which then couldn’t be confirmed because the total on it was zero.

-Reported by Tony Doyle

Jobs set to complete even if they had unposted time or expenses

6764 It was found that users were able to complete jobs even if the jobs had unposted time or expenses on them.

-Reported by Andrew Hambly

Gatekeeping questionnaires error message

6741 It was found that when in the gatekeeping questionnaires page, if you had the jobs status column added to the grid, you got an error message when searching for a client name in the search field: “Invalid column name ‘StatusDesc’ ”.

-Reported by Michelle Jenkins

Billing Issues

6482 If you had two clients in the same group, and one had the other as a billing client, you couldn’t bring in the WIP from the client that had been applied as a billing client on the initial client. For example, Client Alpha, and Client Beta. If I added Client Beta as the billing client on Client Alpha, then created a fee for Client Alpha, selecting “add another client” from the drop down in the WIP screen, when I searched for Client Beta, and clicked onto it, the WIP wasn’t brought through.

-Reported by Brad Podzius

BUILD 9.5.6341.18950

FIXES

Analysis Code Duplication

6912 Analysis codes were being duplicated. For example, if the analysis on a task within a job was set as general, the general analysis code was being listed many time. It was listed once for every service that the analysis was active on.

-Reported by Vicky Stephenson

Job Tasks duplication in Jobs templates definition

6911 The tasks on a job were being duplicated when accessed from the jobs definitions screen in admin.

-Reported by Vicky Stephenson

BUILD 9.5.6353.17886

FIXES

No Date Search range in Disbursement Batches posted screen

6737 When in disbursements and the posted screen it was found that there was no longer a date range search to filter your results as in earlier versions.

-Reported by Michelle Jenkins on behalf of Grant Thornton

Gatekeeping Questionnaires Job Status Column Error

6741 It was found that when in the gatekeeping questionnaire page, if you added the job status column to the grid, you got an error message when searching for a client name in the search field: "Invalid Column Name 'StatusDesc'".

-Reported by Michelle Jenkins

Jobs set to complete with unposted time or expenses

6764 It was found that the user was able to complete a job even if that job had unposted time or expenses on them.

-Reported by Andrew Hambly

Unable to open large batch once completed

6738 When importing a large batch with hundreds of receipts and hundreds more allocations with it, it was found that once the import completed and you go to open the batch to view the details, the site was unresponsive. In some instances, the following error was produced: "PE is not responding due to a long running script"

-Reported by Tony Doyle and Andrew Hambly

Disbursement import thinking client codes are duplicates

6986 When doing a disbursement import, the import failed and stated that the client codes were duplicated within the import. This was not the case.

-Reported by Michelle Jenkins on behalf of Price Bailey

Only grouped clients being returned for the billing client field in assurance request setup

6999 In the Assurance request setup, the field for billing client had a query built into it that only returned grouped clients, not regular clients.

-Reported by Brad Podzius

Able to add duplicate rates under override staff and then unable to delete them

6952 On a client job if you clicked on the rates tab and changed the rates to be "custom rates by grade or staff", and added a rate under the "overrides by staff" section, you were able to add another rate as a duplicate to the first, but were then unable to delete it.

-Reported by Michelle Jenkins on behalf of Hogan Taylor

BUILD 9.5.6374.17278

FIXES

Settings for Disbursement Posting not brought through to Posting page

7101 When posting Disbursements, if the "use period end date" option was set in PEWC, it was not being brought through as the default when accessing the Disbursement Posting page.

-Reported by Tony Doyle

Clicking on Locking information folder in fee portfolio produced error message

7097 When in the Portfolios menu, if you went to the Fee Portfolio page, expanded the client folder then clicked on the Locking Information link, a Practice Engine Error message was produced.

-Reported by Victoria Stephenson

Services added in assurance not bringing in service settings from PEWC

7093 When adding a service in assurance to new clients, if the service selected had been set up in categories as “Flat Rate” and given a rate of £50.00, when adding that service to an assurance request, the settings from categories were not applied.

-Reported by Victoria Stephenson on behalf of Milsted Langdon

Attribute in Assurance not listed clearly

7106 It was found that if you had a lot of attributes set up within assurance that were all served by tick boxes, it was very hard to figure out from the page setup and layout, which attribute tick box went with which attribute header/name. The page layout was changed slightly so that a separating line was shown below the tick box, ensuring that all attributes and their corresponding tick boxes were easily viewed.

-Reported by Ben Edwards on behalf of Wilkins Kennedy

Years text hidden behind periods grid

7136 The text “year” was half hidden behind the years grid in the periods page in Administration menu.

-Reported by Michelle Jenkins on behalf of Edwards and Keeping

Jobs created without job code

7184 Jobs seemed to be created without Job Codes. The first Job can be created on a client with a blank Job Code as that would be unique, and from there the system would then add any other job created by template with no job code with an automatically selected job code i.e. 001, 002, 003 etc. The problem was that a number of jobs had been set up with blank job codes which then causes problems when completing disbursements.

-Reported by Victoria Stephenson on behalf of Cassons

Unable to add all users in department tab in security admin pages when clicking “assign all”

6742 It was found that when in security admin, on the departments tab, when pressing the spacebar key on the keyboard followed by the TAB key to load all users to the page, when clicking on the “assign all” button, the permissions were only being added to the users listed on the page- This meant that if you had over a certain number of users, only those showing on the initial page were showing, as all users are not loaded to the page with a scrolling bar. Buttons were added to allow users to add or remove the permission to a department for the users on screen, or to all users in the system.

-Reported by Michelle Jenkins on behalf of Grant Thornton and Singer Lewak

Layout of security admin screen had changed

7179 The layout of the security admin screen on the permissions and dashlets tabs had changed, and there was a large blank space at the top of the page, moving the grid of users further down the page.

-Reported by Victoria Stephenson

Reports Layout page in Admin

7139 It was reported that the Reports Layout page in Reports Admin was very slow loading, and that there was no search field to easily navigate reports for editing.

-Reported by Tim Johnstone and James Arthur

Editing PELerts changes are not saved

7134 It was found when editing PELerts to the frequency of an alert or adding or removing days or changing the times, when clicking save the changes were not saved at all.

-Reported by Tony Doyle on behalf of Hogan Taylor

BUILD 9.5.6414.25717

FIXES

Details missing from assurance once client created.

7197 A number of fields when filled in in assurance were not keeping information once the assurance request was approved and a client created. This was the case for both Person and Organisation clients.

-Reported by Victoria Stephenson

Add a button to print expense claim with all attachments

7089 A button was added to the print expense function to enable the export of attachments and images on the receipts in order to print them.

-Suggested by Brad Podzius

Linked to Item:

Apply images of receipts to expenses report printout

6747 It was requested that Images on or attached to receipts be included when printing an expense report.

-Suggested by Brad Podzius and Mike Francis

List Assurance Service Alphabetically

7242 It was suggested that the assurance service list be ordered by service description rather than code, as the list wasn't displayed in alphabetical order. Doing so would allow users to quickly and easily locate the services they wanted.

-Reported by Tony Doyle on behalf of Price Bailey

Assurance Questionnaires; Not returned to the same page when questionnaire submitted

7281 When in Assurance and trying to go through the final stages by saving and submitting questionnaires for approval, it was found that the user was not being returned to the same screen with the search description initially entered. Instead of being returned to the outstanding questionnaires page, you were directed to the assurance questionnaires for the user, with the search description removed.

-Reported by Victoria Stephenson

Quick Add facility for adding services in Assurance

7243 In previous versions of PE there was a Quick Add function for adding services within assurance.

-Reported by Tony Doyle on behalf of Price Bailey

Allow WIP transfers to jobs with a status of Complete

6061 It was decided that WIP transfers and WIP transfers within bills should allow transfer to and from Jobs with a status of Complete.

-Suggested by Tony Doyle and Andrew Hambly

Editing a recurring fee meant you couldn't bulk post it

7384 It was found that editing a recurring fee meant you couldn't bulk post it.

-Reported by Tony Doyle

“Include” drop down in extended contact search page

7402 If you selected to search by “non-contact clients only” under the “include” drop down fiend in extended contact search, nothing happened to the grid list- the filter was not being applied and the results displayed correctly.

-Reported by Tony Doyle

BUILD 9.5.6418.19381

FIXES

Non-unit based allocations allowing expense codes that use units

7463 Non-Unit based allocations shouldn’t allow expense codes that use units.

-Reported by Tony Doyle

Receipt Transfers and Receipt Re-Allocate showing local currency on foreign currency clients

7480 When doing receipt transfers or receipt re-allocations the system displays the local currency value even if the client uses a different currency. That made it appear as though you needed to enter the value in the local currency, which wasn’t the case

-Reported by Ben Edwards

BUILD 9.5.6429.29211

FIXES

Search field in Disbursement batches not working

7487 If the user entered a name to the search fields within disbursement entry, the results in the grids were not being filtered.

-Reported by Victoria Stephenson

BUILD 9.5.6507.19673

FIXES

Using “/” in client codes prevents access

7618 Assurance let you use the “/” symbol in client codes, but if the forward slash was used, you were unable to access any of the client details as the client code forms part of the PE URL and you couldn’t have an extra “/” in the URL.

-Reported by Ben Edwards

Unable to skip to last page on reports

7532 When running large reports there was no way of skipping straight to the last page using the arrows. You could type in the page number and press TAB but it was decided that having a double arrow button to skip to the last page was preferable.

-Reported by Victoria Stephenson

Could add, approve and post expenses and disbursements to suspended clients

7498 It seemed that even if the transaction setting controlling the “lock suspended clients” had been ticked and applied, that you could add, approve and post expenses and disbursements to suspended clients.

-Reported by Brad Podzius

Question mark in ClientName

7805 It was found that a client name could have a question mark in it, but a statement pdf has the ClientName in its filename, and the pdf itself couldn't be created properly if it had a question mark in it.

-Reported by Ben Edwards

Removing access to departmental timesheets and for approval doesn't save

7914 On the Staff Dashboard on the Timesheets dashlet, if you removed the ticks to allow the display of "Departmental Timesheets" and "For Approved" and clicked the save button, the changes were made, but when navigating away from the page and back again or logging out, the changes reverted and weren't saved.

-Reported by Victoria Stephenson on behalf of Wilkins Kennedy

Reports showing for users that don't have permissions to them

7945 When all group access was removed from reports and left available to the supervisor, the report was still showing as available and successfully run by other groups, not just supervisors.

-Reported by Michelle Jenkins on behalf of Edwards and Keeping

Reporting bug; Report ordering

7944 The order you can set on the report details within report admin was not having any effect on the display order of the reports.

-Reported by Michelle Harris

Exporting Reported data from client staff or contact reports not working

8004 If you opened Reports from the client menu and clicked the export icon on the right of the reports description on any report, it failed as the client wasn't passed to the report.

-Reported by Tim Johnstone

BUILD 9.5.6530.25916

FIXES

Unable to print billing guide from client WIP pages

8061 The billing guide was not produced when clicking the print button from the client's WIP pages on the print tab.

-Reported by Victoria Stephenson

Error message when creating new engagement from contact record and source details tab

8081 If you went to a contact's details page, on the client tab clicked on the new engagement button, once the page loaded, if you clicked on the source details tab, the user would be presented with an error message saying "sequence contains no elements".

-Reported by Michelle Jenkins on behalf of Price Bailey

MODIFICATIONS

Add/Auto Allocate function- option to disable

8017 It was requested that an option to disable the Add/Auto Allocate option within fee creation was added. This has been added as a system option in tblSystemOptions, which can only be actioned by someone with access and knowledge of SQL tables.

-Suggested by Andrew Hambly on behalf of Blum Shapiro

KNOWN ISSUES FOR 9.5

Edge Users: Department Schedule selections are cleared when you click next day/week

4742 When in the department schedule in Portfolios, it was found that when using the Edge browser, any selections you had made to filter your results were cleared when you clicked on the next day or week buttons.

-Reported by Michelle Harris

Duplicate>

5899 This was the same issue as above.

-Reported by Brad Podzius on behalf of BPB

UNSOLVED:

Reason: This appears to be due to the following; <https://developer.microsoft.com/en-us/microsoft-edge/platform/issues/8728784/>

This can be an intermittent problem and as such does not happen all the time. Waiting on a fix from Microsoft.

-Ryan Posener Head of US Development