Release Notes V9.1.5

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Release Notes

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RELEASE NOTES

These Release Notes give you information regarding changes, modifications and fixes to the Practice Engine software. The information contained within this document refers to changes made since the last version release. (For information pertaining to all changes since a particular release, please contact Support for a Version History.)

Prospects and Pipeline, PE Collect and Client Monies are not part of the core Practice Engine system and are subject to additional License Fees and Service Fees. Please contact support for further information on pricing.

SYSTEM REQUIREMENTS

Practice Engine Version 9 requires a minimum of SQL Server 2008 R2, but SQL 2012 or SQL 2014 is recommended. V9 also requires an SMTP relay that can be connected to from Practice Engine. This is a requirement due to changes to security and authentication.

Test systems for V9 need to run on a different web server to V8. This is due to V9 requiring a version of the .Net framework which can cause issues with V8.

WHAT'S NEW IN V9.1.5

GENERAL

System	New user interface.
	Updated page styles to make HTML5 compatible.
	Removal of all Silverlight pages.
Browser Settings	Dashlet, Menu, Batch, Most Recently Used and grid settings are retained in temporary internet data in each browser and on each device. If Cookie and Website data is cleared from temporary internet files/ browsing history, user selections will be lost.
Security and Logins	A new security model has been developed to provide a faster and more robust experience.
	The portal database has been removed and portal user information is now held in tblStaff.
	Sessions are no longer being used.
	A new 'Impersonation' function has been added which works with In Forms authentication and allows the user to become another user until the browser is closed.
	Additional links to Active Directory have been developed – allowing the maintenance of groups to be completed using Active Directory.
	Each page within Practice Engine has a unique URL. These URL's can be bookmarked and used elsewhere – e.g. via email.
Grids	The new HTML5 grids provide improved response time through the use of 'infinite grids'. Results are returned as the user scrolls down the page.

New search facility within the new HTML5 grids allow searching on multiple criteria, based on the selected columns within the grids. Search criteria works on text only.

Users are able to select the columns that they would like to see on the grids. This information is stored within local storage on the device, so the user can have different selections for different devices.

Grid data can be exported to csv.

Grid data can be added to batches for use with batch admin features such as job rollover.

Help functionality A new Help function has been added. This provides the user with a search functionality of the knowledge base.

STAFF

Dashboard A new Staff Receivables dashlet has been created. This provides the partner/ manager with a summary of receivables information.

JOBS

Job Budgets An additional budgeting type has been created. This type allows for budgeting 'By Task By Role'.

CONTACT

Dashboard A new Contact Events dashlet has been added.

CONTROL/ ADMIN

Dashboard Defaults A new page has been included that provides a mechanism to create default dashboards based on Staff Grade. This page is called Dashboard Defaults and can be found from the Staff Maintenance section of the Admin menu taskpad.

Security Administration There is new page called Security Administration that has been created to manage security groups, associated permissions and group membership. It is aimed at simplifying the security process by consolidating the Group Security, Group Membership and Permissions pages into a single page.

MODIFICATIONS IN V9.1.5

GENERAL

Phone Book	The Phone Book search has been rewritten in HTML5. It can be found from the Home menu.
Out of Office	The Out of Office feature has been rewritten to remove Silverlight. It is a feature that has been deprecated and will be removed from future versions. It can be found from the Home menu.

STAFF

Staff Searches	The staff Sub- Department has been added to the staff search.
Staff Dashboard	The Reports dashlet on the Staff Dashboard includes a scroll bar when a large number of reports have been added to Dashboard favorites.

CLIENT

Attributes	Coding has been added to display attribute attachments when they are not image files.
WIP Trans	A job status drop down has been added to the Print tab of the WIP Trans page to allow the WIP to be filtered by job status.
WIP Transfers	A Next button has been added to WIP transfer pages to navigate back to the start of the transfer after confirming the current one.
Dashboard	The Client Staffing dashlet has been modified to display additional client ownership details of Organization, Office, Department, Sub-Department, Status, Partner, Manager and In Charge.

FEES AND BILLING

New Draft Fee	Unposted expenses have been added to the display on the New Draft Fee page.
	Expand and Collapse all icons have been added to the A/R page of the draft fee wizard.
Recurring Fees	A LOST client check has been added to the Recurring Fee Generation routine.
Bulk Fees	An All Organizations option has been added to bulk fee printing.

JOBS AND WORKFLOW

Jobs module	The Jobs module has had an extensive rewrite to remove all Silverlight pages.
Schedule Portfolios	The task for the job has been added to the tooltip on both the Department Schedule and My Portfolio Schedule.
Client and Staff Jobs page	The list view has been rewritten to allow the user to choose which columns are displayed.

	In Line editing of the jobs has been added to the Client and Staff Jobs pages. Clicking onto the job name will expand the line to allow the job details to be updated.
Job Templates	The job template pages have been rewritten to include all of the information that is held against a job.
Job Budgets	The automatic job budgeting option has been modified to allow budgets to either be created based on actual time or from the previous year's budget.
Work Timer	A new work timer has been included on the Job Details pages.
TRCS	TRCS functionality has been replaced with the staff jobs list.
	A "Global Tax Job Management" page has been added which can be found on the staff details taskpad.
Job Tracker Portfolio	The Job Tracker portfolio has been changed to display the workflow statuses rather than prescribed tracker tasks. The Workflow statuses can be set and managed within Categories Etc.

ASSURANCE

Assurance module	The Assurance module has had an extensive rewrite to remove all Silverlight pages. The pre-defined templates have been removed and all new requests now start with a 'clean slate'. This is to simplify the process.

CONTACT

Attributes	Coding has been added to display attribute attachments when they are not image files.

DATA ENTRY

Daily Timesheets	The Timer has been changed to allow use of the timer when editing items.
Expenses	Grid totals have been added to the expense pages.

CREDIT CONTROL MODULE

Dunning Letters	An option to email dunning letters has been added.

PORTFOLIOS AND REPORTS

Macros	A new 'Last Period' option has been added to the Period Type drop down on the Report Macro Line Detail page. This allows the report to be set to run for the Last Period when included as part of a macro.

	An option to run a single line of a macro has been added. This can be found by right clicking onto the required report within the macro details and selecting Test Line from the context menu.
	An option has been added to allow macros to be shared with other users.
Aged A/R and Aged WIP Portfolios	Context menu options have been added to the lowest line items of these portfolios. These options will allow the user to navigate to the A/R or WIP transactions.
Fee portfolio	A manager choice has been added to the Unprinted Fees option within the A/R node.
Special Portfolios	The buttons have been rearranged on Special Portfolios to a more logical arrangement.
	An auto refresh functionality has been added and the portfolio titles are now returned from the portfolio SP.

ADMIN/ CONTROL

Questionnaires	Multiple levels of approval have been added to Questionnaires.
Statistics	A Current Period Refresh has been added to the Statistics page.
PElert	The PElert page maintenance page has been rewritten to use HTML5.
	The monthly schedule options have been changed to allow the selection of days after the 28th of the month.
Categories Etc	Clicking onto either the title of Menu or List will collapse the relevant section to allow more of the details to be seen across the page.

FIXES IN V9.1.5

CLIENT

WIP Transactions	The Client WIP page was not showing services that only contained 1 transaction. This has now been modified to display correctly.
Services	There was a problem with the service In-Charge getting overwritten when another service was added. This has now been resolved.

FEES AND BILLING

Recurring Fees	Narratives were being left as URL encoded. This has been fixed by adding some code to Unicode the text before saving to the database.
Drafts	The Policy Check dialog was causing a postback which disabled the Submit or Confirm buttons. This has now been rectified.

JOBS AND WORKFLOW

Complex Jobs	There was a problem with job template view problems for complex tax jobs. This is now fixed.
TRCS	The jurisdiction Extend/Unextend dialog has been fixed.

DATA ENTRY

Deposits	A rounding error was occurring when items were unchecked from the allocation. This was a JavaScript rounding error which has now been fixed.

ADMIN/ CONTROL

Categories Etc	Date pickers were not working correctly within Categories Etc. This has been fixed.

PROSPECTS

Events	The status flag of new events has been fixed to show Incomplete by default.
Attributes	The attribute save function has been fixed to ensure that Boolean Value has a value in tblProspectAttribute.