practice engine

Version 9.2 Builds

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VERSION 9.2 BUILDS

BUILD 5571

FIXES

Client Pages	If a client page was selected from within the Client menu – Task Pad section prior to searching for and selecting a client, an error message was received. The page now properly redirects to Client Search.
Popup Timesheet	Popup Timesheet (Home menu – Popup Timesheet) page will now open without error.

BUILD 5585

FIXES

Prospect List Refiners	The refiners on the prospect list now show as 'with opportunities' and 'without opportunities' instead of 'opportunities' and 'just business cards'
Client/Contact Attributes Date Fields	If a date field is used on the client or contact attributes page, it will now allow for a date prior to 01/01/1980.

BUILD 5592

FIXES

Client Dashboard - Prospect Details Dashlet	'Add Prospect' button has been removed from the Prospect Details Dashlet on the Client Dashboard.
Prospects – Existing Contact	When adding a new prospect and selecting an existing contact (on the right hand side section), an error message was received when the existing contact had a null value in the Salutation, FirstName, LastName, or Email fields.

BUILD 5613

FIXES

Daily & Weekly Timesheet	Tab functionality has been restored to enable use of the Tab button to select the client and navigate to the next field within time entry page.
Fee Portfolio – WIP – Entire Portfolio	When creating a group fee from within Fee Portfolio, once fee has been submitted or closed, the page now redirects back to Fee Portfolio instead of Client Dashboard.
Collection Letter Setup	In Admin menu – Categories Etc –Special Categories – Collection Letter Layouts, the option to create an event after printing a collection letter, and then creating a follow up event after a specified number of days after the printed date (using the 'Days' field) is now properly calculating.
Job Details – Time Entry button	Error message received when using Time Entry button within Job Details when there is not a current, active timesheet has been updated to provide additional details about why error occurred.

BUILD 5627

FIXES

Old-style page permissions	After updating permissions for old-style pages in Security Administration, the permissions were not updated until after deleting temporary internet files. Now, the permissions are updated after the page is refreshed.
Transferring WIP between Clients	After transferring WIP between clients, the WIP transaction 'Details' column no longer showed which client the WIP was transferred from. Now, the 'Details' includes 'TRF' along with the client name from which the WIP was transferred.
Staff Charge Rates - Work Profile	Under the Staff Charge Rates page - Work Profile tab no longer allows for multiple profiles with the same start date.
Staff Dashboard – Portfolio Dashlet	In the Portfolio Dashlet on Staff Dashboard, the link beside WIP and AR redirected to the Global Portfolio instead of the specific staff member's view. It now redirects to the specific partner/manager view in the portfolio.
Assurance Request Created by Won Prospect	Within the assurance request created from a 'Won' prospect, the date of birth for a person contact was defaulting to 01/01/1900. The date of birth field now defaults to 'mm/dd/yyyy'
Error Message When Printing Billing Guides	When printing Billing Guides from within Portfolio menu - Main Portfolio Summary, an error message appeared. The Billing Guides now print without error.

BUILD 5634

FIXES

'Show Group' checkbox in Deposit Entry not working	Within the Entry menu – Deposit entry, upon selecting the 'Show Group' checkbox, an error message would appear. The checkbox can now be selected without error.
Task Description Duplication on Job Schedule	Within job scheduling, if a task was copied to multiple days/staff members, the description remained the same in the schedule view. Now, the description does not appear in the overall schedule view, and when hovering over the scheduled item the detailed description will appear.
Job Selections Not Available in Schedule Editor for Job Schedule	When selecting 'Add a Schedule' from within the Job Schedule page, the Job menu option did not display all of the jobs for the selected client. All of the active jobs for the client now appear for selection.
WIP/AR tab within Zero Bill & Draft Fee Not Saving Changes in Internet Explorer	In Internet Explorer, when using the WIP/AR tabs to navigate within a Zero Bill or Draft Fee, the changes made on the Header tab were not saving. The changes will now save when using the tabs.
WIP/AR Reserve Portfolio – Reserve Window Requires Scrolling Up	In the WIP/AR Reserve Portfolio, select a Partner, at the bottom of the page select the option to view '9999' lines/page. Scroll to the bottom of the page and select the hyperlink in the 'WIP Res' column. Previously, the dialog box appeared at the top of the page, which required scrolling up. The dialog box now appears in the current view.
Job Schedule Not Displaying All Staff Scheduled	When scheduling staff, the schedule was not appearing in the Job Schedule view. The job schedule view now shows all scheduled staff.
Job Period Start/End Date Calculating from Client Year End in Assurance Request	If adding a job from within an Assurance Request – Engagement Details, the job period start/end date will calculate from the client year end date on Engagement Details, instead of calendar year.

BUILD 5641

FIXES

PELerts Not Running	A database error was recurring when trying to run PELerts. This has been resolved.
Zero Bills – WIP Amount Displaying in C/F column instead of P/L	When creating a zero bill for a positive and negative transaction with the same value, the amounts were automatically appearing in the C/F column instead of the P/L column. The amounts are now automatically appearing in the P/L column correctly.
Actual Hours Column in All Jobs Lists	The Actual Hours columns has been updated in all jobs lists to display as hours, not a monetary amount.

Displaying as a Monetary Amount	
All Staff Details page Redirecting to Staff Dashboard	The All Staff Details page under the Staff menu – TaskPad will not properly open the All Staff Details page, not redirect to Staff Dashboard.
Unable to Open Job Questionnaire	On the Job Details page – Job Questionnaires, selecting a job questionnaire to open would produce an error. The page will now open without error.

BUILD 5648

FIXES

Unable to Save Client/Contact Connection Without Changing Connection Type	When adding a client or contact connection (Contact or Client menu - Task Pad - Contact of Client Connections), the Connection Type option defaulted to the first item in the list. In order to save the connection, the Connection Type value had to be changed. The option now defaults to a blank value to allow for selection.
Adding Relationship in Assurance Request Not Saving Preferred Checkbox	If the preferred checkbox was selected adding an existing contact as a relationship within the Assurance request, the preferred option did not carry forward to the contact or client connections. Now, if the preferred checkbox is selected, the setting carries forward and shows as preferred within contact or client connections.

BUILD 5655

FIXES

Link on Contact Dashboard - Connections Dashlet Produces Error	Within the Connections Dashlet on the Contacts Dashboard, when selecting a connection's name an error message appeared. The link now redirects to the Contact Dashboard of the appropriate contact.
All Contact Details Page Will Not Open	The All Contact Details page within the Contact menu has been resolved to open without error.
Contact Other Details Page Produces Error	The Contact Other Details page within the Contact menu has been resolved to open without error.
Unable To Save Changes to Weekly Occurrence in PELert Maintenance	The changes made to the number of weeks within the PELert setup (Admin menu - PELert Maintenance) - Frequency details for weekly occurrence were not saving. The changes made will now save after selecting the 'Save' button.

BUILD 5669

FIXES

Questionnaire questions created using type 4 (SQL Query) Not Displaying Values	Within a questionnaire, if values on a question were derived from a SQL query, the values were not displaying. The values now appear as expected.
Staff Member's Able to Access Practice Engine After Inputting Ended Date	If a leave date is inputted in the 'Ended' field on Staff Details for a staff member, he or she will no longer have access to login to Practice Engine.
WIP/AR (DRS) Details Displaying Incorrect Partner Details	When accessing the Aged WIP/AR (DRS) Portfolio via the Portfolio Dashlet links, the Client Group details were displaying for the incorrect partner. The details now appear correctly.
Old Permission Pages in Staff Details Not Updating Security Administration	If updating permissions for a staff member from within Staff Details, the permissions will no flow through to Security Administration and grant/remove access.
In Internet Explorer, Unable to Print Fee After Draft Confirmation	In Internet Explorer, when a draft fee was confirmed and the print option selected, the report viewer would not open. The report viewer would eventually open after selecting a different item on the client's Dashboard. This has been resolved to open the report viewer immediately after confirmation, when selected.
Error Received When Saving a Service Using Quick Add in Assurance Request	An error message no longer occurs when saving a service created using the 'Quick Add' option within Assurance.

BUILD 5675

FIXES

Add Client Code to Client Name on Auto-Complete Field In Schedule Editor	The client code now displays along with the client name when searching for a client within the schedule editor to schedule time for a job.
Updating Task Details Are Not Saving	When making changes to a job's task details, the 'Update Task' button was not saving the changes. Now, the 'Update Task' button will save the changes as expected.
Unable to Select a Different Address within Draft Fee	On the Header tab, if a different address was selected using the button to the right of the 'Address' field, the address field did not update. The selected address will now overwrite the default address and display correctly.
Staff Productivity Dashlet YTD Details Displaying PTD Values	On the Staff Dashboard, if selecting one of the YTD values on the Staff Productivity Dashlet, the details were displaying the PTD information instead of YTD. The details now properly display the YTD values.

Available Time For Staff on Selected Date on All Schedule Views	Once a date and staff's name is selected within a schedule editor, the available time for that staff on that day will display.
Unable to Access Assurance Questionnaires from within Client Questionnaire Page	When trying to view a client's assurance questionnaire from within the Client Questionnaire page (under the Client menu), an error would occur. The error has been resolved and the client's assurance questionnaire is now accessible.

BUILD 5679

FIXES

Date Appearing Incorrectly After Selected from Date Picker in Schedule Editor	When a date was selected from the date picker within the schedule editor, the date displayed would be date selected – 1 day. The date now displays the selected date correctly.
Credit Clients Pop-Up Window Continues to Disappear	If a client has a related credit contact on the A/R/Collection tab, then when viewing the contact's page and selecting the Credit Clients button to the right of the email address field, the dialog box flashes and then disappears. The dialog box will now appear for viewing.
Assurance Source Details Payee Field Produced Error When Name was Entered and Then Removed	A name can now be entered, saved, and then removed in the Name field on the Source Details tab of the Engagement Details within an Assurance Request without error.
Error Occurs When Changing Settings on the Staff Portfolio Dashlet	On the Staff Dashboard, the Staff Portfolio Dashlet settings can now be changed without error.
Group Refiner Option in Security Administration	There is now an option to filter by security group within Security Administration (under the Admin menu). This will allow the ability to view less security groups on the page at one time when setting group permissions.

BUILD 5690

FIXES

Task Due Date Not Calculating Correctly Based on Frequency	The due date for a task was not calculating based on the selected frequency (Due Date Period, Due Date Interval, and Due Date From fields) within the Task Details. The due date will now calculate if a frequency has been entered and the option for "Due Date Fixed" has not been selected.

BUILD 5704

FIXES

Date Completed Not Auto-Populating in Task Details After Status Is Changed to Completed	When the task status has been changed to ‘Complete,’ the date completed will now populate with the date of the change.

BUILD 5718

FIXES

Realisation %Age Added to Staff Productivity Dashlet	The Realisation %Age value has been added back to the Staff Productivity Dashlet.
Unable to Delete Relationships Entered in Assurance Request	Within an Assurance Request - Relationships, if the delete button was selected in order to delete a relationship, the relationship details would open and the relationship wasn’t actually deleted. The relationship will not delete as expected.
Assurance Questionnaire Details Not Appearing Correctly in Gatekeeping	After submitting a completed questionnaire, the questionnaire details in Gatekeeping were not displaying the information correctly. Some fields were preselected and showing different values than the ones originally selected. Gatekeeping is now displaying the questionnaire details exactly as originally submitted.
Assurance Spelled Incorrectly in Assurance Request List	In the Assurance Request Lists, Assurance was spelled incorrectly. It is now spelled correctly.
Unit Field Not Available on Disbursement Input page	The unit field within the Disbursement Input page did not become available when a mileage analysis code was selected. The field is now available as soon as a mileage analysis code is selected.
My Prospects List Not Displaying Created Prospects	After creating a prospect, the prospect was not appearing on the ‘My Prospect Lists.’ Now, the prospect will appear on the ‘My Prospect List’ for the user that was signed in when adding the prospect.

BUILD 5725

FIXES

Allow for Bulk Printing Functionality When Bulk Post Permission Is Removed	Within Portfolio – Fee Portfolio, if the ‘BulkPost’ permission was removed for a Practice Engine user, then the Bulk Printing option was also not available as the checkboxes would disappear. This has been updated to allow for Bulk Printing when the ‘BulkPost’ permission has been removed. The checkboxes and Bulk Print button will still be available for selection.

Client Showing As Pending After Questionnaires Are Approved in Gatekeeping	Once a questionnaire was approved in Gatekeeping, the client record was still showing as pending within Assurance Request Administration. This has been resolved to create the client record and show client as 'Active' once all mandatory questionnaires are approved.
Timesheet Code Field Auto-Complete Not Working	When typing the client's name in the code field, the name would not appear for selection below. This has been resolved to display client names as name is being typed.
Tallie Import Importing Data One Column Off	The Tallie import has been updated to import correctly.
Service Portfolio Dashlet & Job Portfolio Dashlet Setting Changes Not Saving/Updating Dashlet Totals	On the Staff Dashboard, the Service Portfolio Dashlet and Job Portfolio Dashlet did not update when the settings were changed to include additional information. Also, the setting changes made were not saving. This has been resolved to update the Dashlets totals and save the setting changes.
Engagement Attributes in Assurance Defaulting As Selected and Changes Made Were Not Saving	Within an Assurance Request, the engagement Attributes with checkboxes were auto-selected. If the check was removed from the checkbox, the change did not save. This was causing the attribute fields to appear as activated when the client was created. The checkboxes will now default as unchecked, and changes made to the checkboxes will save as expected.
Inactive Groups Appearing for Selection in Group Field in Assurance Request	The Group field in an Assurance Request – Engagement Details was allowing for selection of inactive groups. Now, only active groups will appear for selection.
Setting Date Picker Removes Schedule Items on Job Schedule	On the Job Scheduler, if a date was selected and Set in the date field, the schedule items would disappear from view. This has been updated to show the schedule items for the selected date.

BUILD 5753

FIXES

Incorrect Tasks Appearing in Job Scheduler	Within the schedule for a specific job, the correct job name was appearing, however the tasks available for selection were not the tasks for the selected job. This has been resolved to show the correct tasks for the specific job selected when adding a schedule item in the job scheduler.
WIPCost Not Appearing Correctly When Using Negative Time Entries	If negative time entries are used to correct a time entry, the WIPCost was not reflecting the negative values correctly. This has been resolved.
Task Date Completed Displaying Current Date Erroneously	The task date completed is now updated appropriately when the status is changed to 'Complete.' The task date completed update will no longer change the displayed completed date on other tasks erroneously.

Security Administration Group List/Member Details Are Missing	On the Group List & Member tabs within Security Administration, the details were missing. The details are now appearing.
Former Employees Not Appearing on Department Schedule	If a former employee was scheduled to a job, they were not appearing on the Department Schedule. Now, former employees will appear on the Department Schedule when scheduled to a job.
PE Task Code From Master Task Not Coming Across to Task	If a Master Task had a Task Code on the Task Details page, the Task Code was not carried forward to the task details when the task was created from Master Task. The task code will now carry forward from the Master Task to the Task Details.
Unable to view Receipts Detail on Staff Service Portfolio Dashlet – Error Occurs	On Staff Dashboard – Staff Service Portfolio Dashlet, if the receipt value was selected in order to see the receipt detail, an error message occurred. This has been resolved, and the receipt detail can now be viewed.
Lost Clients Appearing In Code Field Within Timesheet Entry	In a timesheet entry, lost clients were appearing when typing in a code in the code field. This has been resolved to not show lost clients.

BUILD 5767

FIXES

In IE 11, Date Range Fields Distorted On Client Events Page	If using IE 11, in Client Events (under the Client menu), the date range fields on the completed tab were distorted and therefore could not be edited. This has been resolved to display the fields as expected.
Portfolio Schedule View Permission Added	An additional permission was added for 'PortfolioScheduleView' to work with a view only version of the page 'My Portfolio Schedule.'

BUILD 5774

FIXES

Prospect Rating Column Not Displaying Data in Prospect Lists	The Prospect Lists now display the prospect rating, if added on the prospect record.
Recent Events Dashlet Displaying Incorrect Date in IE and Edge Browsers	Event dates were displaying as one day before the actual event date when viewing them in the Recent Events Dashlet using either IE or Edge browsers. The date is now displayed correctly.
Staff Name Not Saving on Event Entries in Prospect Details	When adding an event to a prospect record, the staff name field was not saving the staff name entered. This field is now retaining the information entered once saved.

Staff Details on Staffing Tab in Assurance Not Saving	Values entered in the Title, Value, or Note fields within the Staffing Tab of Assurance were not saving. These values will now save as expected.
Certain Links on Diagnostic Page Causing Permission Error	When certain links were selected on the Diagnostic page under the Admin menu, an error message would appear relating to permissions. This error has been resolved and the links should now redirect you to the proper pages.
Returned Assurance Questionnaire Messages Now Appearing in Staff Messages Dashlet	The returned reason entered when a questionnaire is returned to the requestor in Gatekeeping will now appear in the requestors Messages Dashlet on the Staff Dashboard.
My Portfolio Schedule Not Displaying Schedule Items for Jobs Logged In User Is Responsible For	The My Portfolio Schedule under the Portfolio menu was only displaying jobs for which logged in user was scheduled, and was not including the scheduled items for the jobs the logging user was responsible. Now, the Portfolio Schedule will display all jobs where the logged in user is either Partner, Manager or In-Charge or the schedule items for those jobs. As well as any jobs where the logged in user is scheduled.
Deadline End Date on Job Template Not Transferring to Job Created Using Template in Assurance	If a Deadline End Date was set on the job template, the date would not flow through to the job created using that template when created via Assurance. The Deadline End Date will now appear on a job created via Assurance when set on the job template used to create the job.
Address Field in Assurance Not Highlighted in Red When Set to User Required	The Address field in Assurance was not appearing as required (highlighted in red) when set to user required in Assurance Request Setup. The field will now appear highlighted in red when set to user required to indicate it is a required field.

BUILD 5840

FIXES

Bulk Job Creation Displaying Staff Fields as Unallocated	Within Bulk Job Creation, if you leave the fields blank (remove the text in each field) for Partner, Manager, and In-Charge, the fields will be populated with the service Partner, Manager, and In-Charge staff members.

BUILD 5856

FIXES

Staff Leave Dashlet Displaying Selected Staff Member's Details	Previously, when a staff member was selected from the search menu, their Leave Details would display when selecting the details from the Leave Dashlet. This has been updated to show the information of the logged in staff member, not selected staff member.

Assurance Source Details – Details not saving	Details entered within the Details field in Assurance – Source Details section will now save.