practice engine

# Release Notes V9.5 (inc V9.4)

2016

# 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.)

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

## SYSTEM REQUIREMENTS

Practice Engine Version 9 requires a minimum of SQL 2012. 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 V9.5

### EXPENSES

Expenses and Disbursements have had a complete rewrite in V9.4. The following items are the key benefits:

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| ***Styling*** | Expenses and Disbursements have been written into the new V9 styling. |
| ***Mobile Receipt Capture*** | The new expenses module provides the facility to capture an image of a receipt using a mobile device and upload this directly to Practice Engine. |
| ***Receipt attachment*** | Receipts can be uploaded to a claim either through mobile capture or from a saved image on a computer. |
| ***Receipt Allocation*** | Receipts can be allocated across multiple clients/ lines within a claim. |
| ***Receipt Grouping*** | Receipts can be grouped within a claim so that multiple receipts can be applied to a single allocation/ client. |

### REPORTING

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| ***Styling*** | The reports area has been written into the new V9 styling. Reports now open in a separate reports window. |
| ***Reports Engines*** | A new Reports Engine Admin page has been created to provide extensibility to link to SSRS reports. Once a SSRS report engine has been added, any SSRS reports can be viewed and run through the main PE reports page. |
| ***Macros*** | A scheduling option has been added to macros to allow them to be run against a specified schedule. |
| ***Report Saving*** | Additional options have been added when saving a report. |

## PROSPECTS

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| ***All Prospects*** | An Events tab has been added to the All Prospects page. This will display all events for all prospects. |

## GENERAL

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| ***Grid Views*** | A reset option has been added to the Columns option to allow column choices to be reset to the default values.<br><br>An additional export option has been added to all V9 grid views. This option is called Filtered Data and will only export the data from the columns that have been selected. (Please note that numeric values starting with a 0, will drop the leading zero's when imported into Excel. This is a known feature of Excel. There is a work around and instructions can be found on Zen Desk and by contacting Support) |

## ADMIN

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| ***Integration Broker*** | Two new pages have been added to the Admin menu under System Maintenance to display the Import and Export Status of any messages sent to and from the Integration Broker. |

# MODIFICATIONS IN V9.5

## TECHNICAL

***.Net framework***

Microsoft have announced that they will stop providing security updates and tech support for .Net 4, 4.5 and 4.5.1. To ensure that PE is running on a patched and supported platform the targeted version of the .Net framework in use for V9.4 will be .Net 4.6.1. This change does not have any functional impact but will require that servers are on a supported patch level from Microsoft. This will affect all servers PE is installed upon – both SQL and the Web servers.

## GENERAL

***Search Screens***

Entered criteria within the extended searches will now be retained for the next search.

***Out of Office***

The Home menu icon will change colour to reflect the status of the user's Out Of Office. In is green, Busy is yellow and Out is red.

## STAFF

***Dashboard***

The News Dashlet news items display time can now be customized. Contact PE Support for assistance.

***Staff Details***

An 'Account Creation' message has been added to the Staff Details page. This is displayed when a user clicks onto the 'Create Account' icon next to the User Id field on the Staff page.

## CLIENT

***DRS/ AR Collection***

The OriginalAttention column was updated to increase the number of characters that can be entered into the Contact Field in Client Details – DRS/ AR/Collection.

***DRS Transactions***

The cheque number has been added to the Allocation report when viewing the allocation of receipts.

## JOBS

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| ***Job Template*** | Filters were added to the Job Template Definition page (under Admin menu – Task Pad) to allow the ability to lessen the amount of templates/services appearing on the page at once.<br><br>Performance of search filters has been enhanced within Job Template Definition page. |
| ***Department Schedule*** | The Department Schedule has been updated to display the internal client name instead of client code on the grid view of the schedule items.<br><br>Colours have been reintroduced to the Department Schedule to highlight different jobs. |
| ***My Portfolio Schedule*** | A checkbox option has been added for 'Show All Rows' to allow for collapsing the view so that only Client/Jobs with current schedule items will display if unchecked, or all managed clients/jobs will display if checked (regardless if there are schedule items). |
| ***Job Lists*** | The date range on a jobs list page has been modified to persist the date. |
| ***Job Tasks*** | The budget information has been removed from the Job Tasks panels. All budgeting for tasks must be done through the Budget panel. |
| ***Job Scheduling/ Dept Schedule*** | An availability search has been added to the Job Schedule pages and the Dept Schedule pages. This provides a view of staff based on filters of Office, Department and Grade. Returned rows of staff displays the availability of each staff member and provides the scheduler with the ability to create new items or swap staff on the schedule. |
| ***Job Questionnaires*** | Submitted by details have been added for Job Questionnaires to the Job Details page. |
| ***Job Details – Forwarding*** | Job forwarding has been changed to allow the job to be forwarded to any staff member, rather than just staff assigned to roles on the job. A Staff Lookup to the right hand side of the Staff selection allows the user to forward to any staff member. |
| ***Job ETC*** | The ETC options have been modified to tie into the budget type selected. If Estimate to Complete is being used against a job, the user will be presented with a budget field and an ETC field on the budget panel. The initial budget figure that is entered created the initial ETC figure. The ETC value can be updated from the Timesheet, the ETC portfolio or from the Budget panel of the job. |
| ***Job Budgets on Job Creation*** | Jobs created from a job template will display the job budget that has been set on the template. For Jobs created manually the budget style will default to the one set as the default within Transaction Settings. |
| ***Job class*** | The Job Class field was hidden within the V9 Job pages. This field can now be exposed if required by following the instructions below:<br><br>1. Copy the file /Views/templates/jobs/jobdetails.cshtml to /Client/Views/templates/jobs/jobdetails.cshtml<br>2. Open the /Client/views/templates/jobs/jobdetails.cshtml file<br>3. Edit line 19 (remove the @* "at-sign and star")<br>4. Edit line 25 (remove the *@ "star and at-sign")<br><br>By default the Job Class field will be hidden. |

## FEES AND BILLING

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| ***Fee Portfolio*** | A new Rejected folder has been added to the Fee Portfolio. Any fees that have had questionnaires rejected will be displayed in this folder. Actions are available to the user to Edit, Preview or Delete the fee. This folder can be found under the Billing node of the fee portfolio. |

## ASSURANCE

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| ***Assurance Request Admin*** | In Assurance Request Admin under the Admin menu, there is now an option to set the 'Default Value' for a specific field. |
| ***Prospects:*** | The Title field has been added to the form when creating new prospects. |
| ***Assurance Questionnaires*** | The History associated with an Assurance Questionnaire can be viewed using the Show History button at the top of the questionnaire. |

## ADMIN

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| ***Security Admin*** | The Permissions tab on the Security Admin page has been modified to allow for multiple groups to be selected within the drop down, using Ctrl and Select.<br>Two additional options have been added to the Security Admin pages – Assign All and Remove All. These options are available on the Members, Permissions, Dashlets, orgs, Office and Depts pages. |
| ***Categories Etc*** | A new option has been added to Transaction Settings to allow the default budget style for jobs to be set. This is applied to all manually created jobs. |
| ***Create New Staff*** | Staff Initials have been made a mandatory field to make it consistent with the validation on the Staff Details pages. |

## FIXES IN 9.5

### GENERAL

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| ***Phone Book*** | Within the Phone Book (under the Home menu), when viewing the details of an entry, the address was only displaying the city and zip code of the address. The phonebook entry is now displaying the entire address attached to the record. |
| ***MRU*** | After confirming a fee within the Fee Portfolio for a client, the client's name did not appear automatically in the Recent Items listing until after a page refresh. The client's name will now appear immediately after the fee is confirmed.<br><br>The Recent Client List was not updating if a user was selecting a client from a Classic style portfolio |
| ***PE Emails*** | Emails from PE were not processing correctly. These issues have been resolved and the emailing is now working correctly. |
| ***Out of Office*** | The Out of Office details will now save when excluding an expiration date, whereas it was previously only saving if an expiration date was entered. |
| ***Active Directory groups*** | When Trusted Logins were in use, Active directory group names were producing an error on login when the group name included an apostrophe. This has been resolved. |
| ***Data Export from Searches*** | When exporting from the client or staff extended search pages using the Data button, the spreadsheet created will now display data. |
| ***Toggle Width button*** | The Toggle Width button would become hidden behind a side scroll bar on grid pages with a large number of lines. The button has now been moved inside the scroll bar so that it is always available. |
| ***Search screens*** | If a user hit Enter when using the search screens, the form was being reset. This behaviour has been corrected. |
| ***Data Downloads in Chrome*** | Data downloads from some of the classic grid screens was appearing as a very small box in Chrome, making it very difficult to open the download. This has been resolved. |
| ***Menu order*** | Menu items were being re-ordered. This has been resolved to order by Menu Ordinal and then by Menu Title. |
| ***Spell Checker on Classic pages*** | The spell checker on classic pages would identify spelling mistakes but would not allow the user to right click and select an alternative. The right click functionality has been activated. |
| ***Events*** | Events were not being deleted when using the Delete Event button within the event details. This has been resolved. |

### STAFF

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| ***Staff Search - Extended*** | The full name field in Staff Extended Search now works as expected. |
| ***Staff Leave Dashlet*** | The Leave dashlet used has been updated to correctly show the leave details for the logged in staff member, not the selected staff member. |
| ***Staff Search*** | The Staff Email column was not returning data within the staff search. This has been corrected. |

## CLIENT

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| ***Dashboard*** | The Details dashlet can now be added to the Contact or Client Dashboard on the Dashboard Defaults page without error. |
| ***Client Reports*** | An error message appeared when trying to print reports under the Client menu. This has been resolved and the reports will now print without error. |
| ***Client Questionnaires*** | A questionnaire could previously be submitted without entering information into all required fields. This has been resolved and all required fields must be entered before the questionnaire can be submitted. |
| ***Client Search - Extended*** | For suspended clients that are not locked and that are still valid, the Extended Client Search was not displaying them as a result when searching for 'Valid' clients. This has been updated to now include non-locked suspended clients into the 'Valid' status search results. |

## CONTACT

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| ***Dashboard*** | The Details dashlet can now be added to the Contact or Client Dashboard on the Dashboard Defaults page without error. |
| | The Contact Details Dashlet was previously not displaying the contact addresses for non-client contacts. This has been updated so that the address will be displayed when entered on the Contact Details page for all contacts. |
| | The Connections dashlet on the Contact Dashboard did not display correctly when there were a large number of connections. The connections overlapped the bottom of the dashlet. A scroll bar has now been added to the dashlet to resolve this issue. |
| ***Contact Notes*** | Contact notes within All Contact Details were not displaying correctly and were unable to be created or edited. This has been rectified. |
| ***Contact Clients*** | The Client focus was not being updated to reflect when a user had navigated to a client's page from the Contact > Clients page. This has been rectified and now passes the client id through to the MRU. |
| ***Contact Search*** | Office details were not displaying in the Contact Search results. This has been rectified. |

## JOBS

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| ***Job Work status*** | The job work status order has been updated to match the order selected within the Work Status setup in Categories, Etc. under the Admin menu.<br><br>The Work Status colours were not displaying on Staff Jobs lists. This has been rectified. |
| ***Tax job dates*** | When a particular jurisdictional tax type has 0, 0 has the due number of months and days, the jurisdictional calculation will be equal to the base date selected within Categories, Etc under the Admin menu. |
| ***Current Due Date*** | The current due date was displaying incorrectly upon job creation. This has been resolved.<br><br>There was a problem with Tax jobs with multiple jurisdictions. When one jurisdiction was marked as complete the current due date was not updating correctly. This has been corrected to update to reflect the due date of the next jurisdiction that is due once the panel has been collapsed.<br><br>There was also an issue with jurisdictional dates not calculating correctly from the base date. The Jurisdictional Due Dates are now all calculated from a Base Date that is indicated on the Jurisdiction panel for each Job. The Base Date selection for a particular Tax Return Type is made in PEWC: Calendar Year Start, Calendar Year End, Client Fiscal Year End, Job Period Start and Job Period End. The Tax Return Type of a Job can be changed in Bulk Job Admin. |
| ***Global Tax Job Management*** | The Global Tax Job Management page was displaying the incorrect current due date. This has been updated to reflect the correct due date.<br><br>On the Global Tax Job Management page, the job details of newly created jobs were missing and no information was displayed for the different columns. This has been resolved to display the job details properly. |
| ***Inactive Job templates*** | Inactive templates are no longer appearing when adding a new job. |
| ***Job Period dates when created through Assurance*** | The Job Period End date entered on the Assurance request was not flowing through correctly to the Job once created if the date was different from the client year end or something other than 31/12. This has been updated |
| ***Fiscal End Date*** | The Fiscal End Date was not displaying correctly on jobs. This has been resolved. |
| ***Jobs created through Assurance*** | Jobs created through Assurance were being created with a job code of 'Unknown'. This has now been changed to reflect any job code that has been set up on the job template.<br><br>Tax jobs added through an Assurance Request were being set with a date of 'Today's' date rather than the base date. The Fiscal End Date on the Jurisdiction panel now reflects the Base Date (see definition above) for the Job. The description of the field has been updated to "Base Date" to better reflect its function. Changes to this date will recalculate the Due Dates on all Jurisdictions for the Job. |
| ***Job Creation*** | Jobs were not able to be created unless there was the Client Year End field had been populated. This requirement has been removed and a job can be created without year end details. |
| ***Work Timer*** | The Work Timer was not displaying the hours and minutes recorded correctly within the work timer if the time was over an hour. This has been changed to display the correct amount of time. |

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| ***Job Budgets*** | The Budget figures on the Task panel were not being updated to reflect the budget figures entered into the Budget panel. This has been resolved to display the budgets correctly on the task panel.<br><br>The budget fields on the task details have been removed. Budgets must be edited from the budgets panel.<br><br>When viewing the job budgets panel using Chrome, the budget type of By Task By Staff By Date was not displaying correctly. This has been changed to display the fields at the correct sizing. |
| ***Job Dates*** | Job dates were not being calculated correctly when being derived from parent tasks. This has been corrected. |
| ***Job Details*** | Parents and Predecessors were not being pulled through from the job template to the job being created from the template. This was also linked to the Job Dates issue in the item above and was due to a change between using task ordinals and task index. This has been resolved. |
| ***Job Rollover*** | The Job rollover dialog had a spelling mistake in 'number'. This has been corrected. |

## ASSURANCE

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| ***Request*** | It was possible to Submit an Assurance Request without saving the details. This has been resolved and the Submit button will not become active until the data on a form has been saved.<br><br>It was not possible to add multiple engagements correctly. This was also affecting the addition of services. This is now fixed.<br><br>The Sex field on the person tab would throw an error if the selection was more than 6 characters long. This has been changed within the tables to allow 10 characters. |
| ***Questionnaires*** | User defined mandatory fields were not being enforced when submitting an Assurance Request. This has been changed to ensure that a user has to complete all mandatory fields before the request can be saved and submitted. |
| ***Prospects*** | When creating a prospect and attempting to add additional information after the mandatory First Name and Last Name had been saved, the Save button was not being displayed. The Prospect forms have been updated to display the Save button when any field has been modified.<br><br>The Save button on any of the Prospects tabs has been disabled until a change has been made. |
| ***Duplicate check for Assurance and Prospects*** | The duplicate check within Assurance and Prospects uses a double metaphone algorithm. This algorithm was not displaying results for common nicknames. The duplicate check has now been enhanced to include a check against a list of common nicknames. |
| ***Questions Setup*** | There was a spelling mistake on 'mandatory' on the question set up dialog. This has been corrected. |
| ***Questionnaire set up*** | Questionnaires using the Build option for the Applies To criteria were using a redundant table when building criteria to be applied to organisations. This has been updated to use the correct table within the criteria. |

## PORTFOLIOS AND REPORTS

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| ***My Portfolio Schedule*** | 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. |
| ***Department Schedule*** | In the Department Schedule (under Portfolio menu – Task Pad), all staff names were appearing for those staff members that had schedule items regardless of what filters were selected. The filters will now filter staff members and schedule items for those staff members and only show the staff members that belong to the selected department, office, and/or organization.<br><br>Inactive staff members will now be included in the filtering when Department, Office, and/or Grade are selected. |
| ***Job Schedules*** | The dates on Job schedules within the Department Schedule, My Portfolio schedule etc were displayed in US date format for all environments. This has now been changed to display based on the browser location settings. |
| ***Reports*** | When running some reports with parameters within Chrome and attempting to export the data, the pop up dialog for the export was being displayed in the bottom right corner of the browser. This has been modified to display correctly. |

## ADMIN

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| ***Imports*** | When trying to import a file that contains line break using Import Control, an error message was received. This has been resolved to allow for importing of data that contains line breaks. |
| ***Diagnostics*** | 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. |
| ***New Staff Creation*** | An error message was occurring when setting up new staff members using Windows Trusted Login. This error message has been resolved. |
| ***Assurance Request Setup*** | Inactive organisation were appearing in an Assurance Request. This behaviour has been rectified, so only active organisations will be presented. |
| ***Security Administration*** | All inactive staff members have been removed from view within Security Administration (under the Admin menu – Task Pad). |
| ***Email Service*** | The PE Email Service has been changed to not update to a status of 'stopping.' |
| ***Licensing*** | The Licensing numbers were not matching between the Period End Analysis page and the New Staff Creation page. This has been resolved and both pages will display the correct licensing numbers. |
| ***Attribute Pages*** | Within the Attribute Pages page there was a problem in setting the order of the attributes. This has been corrected. |
| ***News Items*** | In Categories Etc, when adding a URL or Image to the News Item setup, the URL/image did not work properly. This has been resolved to work with a URL and/or valid image path. |
| ***PElerts*** | It was not possible to configure PElerts within Chrome. This is now working correctly. PElerts will not work on Platform as a Service sites. |

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| | Schedules for PElerts were not being entered corrected into the tables and the associated SQL jobs were therefore not being created. This has been resolved and is now working correctly. |
| ***User Password Control*** | When removing a staff account from User Password Control it was unclear that the account had been removed. The page has been modified to update and remove the staff account from the displayed results. |
| ***Update Partners/ Managers*** | When using the Bulk Update facility to update the partners and managers at client level, the Last Update By information was not being updated. This has been changed. |

## FEES AND BILLING

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| ***Fee Check*** | Within a Draft Fee, if the DRS/AR & WIP values were not matching and the 'Check' button was selected, the show me link within the dialog box were not working. This 'Show Me' link now works and takes you to either the DRS/ AR or WIP tab. |
| ***Zero Bill*** | The date field within a draft zero bill would not save when changed. This field can now be edited and the updated date will remain. |
| ***Fee Portfolio*** | Within the Fee Portfolio, the Drafts For Creator portfolio results were not being updated based on the selected staff grade and/or staff name. This has been changed to update the results based on the selection. |
| ***Billing Wizard > DRS/AR*** | Additional carriage blank lines were being inserted when the page refreshed if the user had used carriage returns within the narrative section. This has been rectified. |
| | There was an issue in FireFox where double carriage returns that had been entered were being removed when the user pressed tab after changing an amount on the DRS/ AR screen. A javascript fix has been implemented to resolve this. |
| ***Fee Portfolio*** | Within Unprinted fees of the DRS node, if email fee was selected, there was no option to be able to exit the Email viewer. A Close behaviour has been added to this view. |
| ***Transfer WIP within Client*** | WIP amounts were being round up when transferring WIP within a client. This has been fixed. |

## DATA ENTRY

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| ***Daily Timesheets*** | Daily Timesheets were producing an error when the first day of the timesheet week was set to Sunday. This has been resolved. |
| ***PopUp Timesheet*** | The Workflow Status drop down was not showing as an option on the Pop Up Timesheet. This has been resolved and will now display correctly. |
| | The Pop Up Timesheet was not accessible if the user tried to navigate to it as soon as they had logged in. This was due to the authentication not being passed correctly. This has now been resolved. |