Version History – V9

Version History

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PRACTICE ENGINE V9 VERSION HISTORY

This document gives you information regarding changes and modifications to the Practice Engine software. The information contained within this document refers to changes made since Version 8.5

PE Filer, Prospects and Pipeline 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.

They have been excluded from the Version History but details of any changes to these modules can be found in the Release Notes.

NEW FEATURES AND MODIFICATIONS IN PRACTICE ENGINE V9.1.5

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.

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Contact Dashboard	A new Contact Events dashlet has been added.
Dashboard	A new Staff Receivables dashlet has been created. This provides the partner/ manager with a summary of receivables information. Users now have a choice to either use the User Choice of dashboard layout or the system default settings, which can be set by grade within the Admin menu.
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.
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.
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 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 favourites.
Aged DRS 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 DRS or WIP transactions.
Fee portfolio	A manager choice has been added to the Unprinted Fees option within the DRS node.
Special Portfolios	The buttons have been rearranged on Special Portfolios. An auto refresh functionality has been added and the portfolio titles are now returned from the portfolio SP.
Jobs module	The Jobs module has had an extensive rewrite to remove all Silverlight pages.
Job Budgets	An additional budgeting type has been created. This type allows for budgeting 'By Task By Role'.
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 Jobs page. Clicking onto the job name will expand the line to allow the job details to be updated.

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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.
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.
Client Staffing dashlet	The Client Staffing dashlet has been modified to display additional client ownership details of Organisation, Office, Department, Sub-Department, Status, Partner, Manager and In Charge.
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 DRS 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 Organisations option has been added to bulk fee printing.
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.
Questionnaires	Multiple levels of approval have been added to Questionnaires.
Statistics	A Current Period Refresh has been added to the Statistics page.
PElert	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.
Dunning Letters	An option to email dunning letters has been added.
Assurance module	The Assurance module has had an extensive rewrite to remove all Silverlight pages.

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NEW FEATURES AND MODIFICATIONS IN PRACTICE ENGINE V9.2

Prospect Dashboard	A new Prospect Dashboard has been included which will provide the user with information regarding pinned prospects and opportunities, conversion rates of prospects and opportunities, and activity feed of events and visual representation of the information.
Prospects	The Prospects module has been rewritten into the V9 format. New Prospects pages have been created for All Prospects and My Prospects.
Opportunities	Two role types have been added to Opportunities – Opportunity Roles and Target Roles. These allow staff members to be allocated to the opportunity (Opportunity Roles) and contact people to be entered against the opportunity (Target Roles).
Grid pages	The search facility on the V9 grid pages has been adjusted to allow for multiple search items.
Change Password	A new button has been added to the Change Password dialog pages to redirect back to the Staff Dashboard following
Charge Rates	The OK button has been changed to an Apply/ Undo button. Once changes have been applied the user will stay on the same page rather than being redirected back to the Staff Details page
Edit WIP Transactions	A spell check option has been added to the Edit WIP Transaction page on the Client menu and the Edit WIP option within the Billing Wizard.
Bulk Job Admin	A Recalculate Job Jurisdiction action has been added to the Bulk Job Admin page.
Job Tasks	Totals have been added to the Budget and Actual columns of the Task panel within a job.
Tax Job Management	The tax job management page has been changed to a Global Tax Job Management page. The refiners have been changed to All, Active and InActive. The Job Rollover Status has been added as a column option to the Global Tax Job Management page.
Job Lists	Group/ Family, Job Complexity, Next Action Date and Rollover Status have been added as a column options to Job Lists.
Next Action Date	A Next Action Date has been created that is the minimum of tasks, jurisdictions and job other and end dates – whichever is the next date,
Job Dates	When setting up a new job, there are fields to hold both the Tax year as well as the Fiscal year for the job..
Job Templates	A new template name placeholder has been created [TTTT]. This placeholder will insert the Tax Year into the job name.
Assurance Request	A Quick Add services button has been added to the Assurance Request Engagement page. This can be found by using the menu option available to the side of the Add Service button.

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NEW FEATURES AND MODIFICATIONS IN PRACTICE ENGINE V9.3

SDK Kit

An SDK kit has been created with API help documentation to support integrations with other products. This is for clients wanting to create their own API links to Practice Engine.

Database Structure

The 9.3 database structure has undergone some radical changes to optimise it for use with Azure and performance. It now makes use of multiple database files to leverage the use of hypervisors and optimise resource use.

The 9.3 database has been converted to use nvarchar and Unicode characters. This allows for the use of extended characters. This will mean that the new database is marginally larger than the previous database.

During the upgrade process the PE database converter will change any varchar(4000) to be nvarchar(max). All custom columns, tables and program code will be moved and converted to nvarchar.

Indexes and statistics on the database need to be rebuilt daily. A recognised benchmark will be used for the maintenance of the SQL data – https://ola.hallengren.com. This is a set of SQL scripts and SQL agent jobs that will run.

Data Warehouse

Practice Engine 9.3 comes with an optional PEWarehouse database which is a secondary SQL database containing a copy of the essential content of Practice Engine redesigned in to an accessible and easily queried data mart using an industry standard star schema model.

(https://en.wikipedia.org/wiki/Star_schema).Scheduled jobs replicate data from the Engine database to the Warehouse database at a frequency suitable to your infrastructure and a couple of demonstration reports in SQL Server Reporting Services can be deployed to give a flavour of what's possible with a reporting database.

This feature is designed to make your Practice Engine data accessible to the wealth of new Business Intelligence and Data Mining tools that are flooding the industry and becoming core to a lot of Microsoft products. The tables are easy to understand, easy to query over years worth of history without performance

Caching

2 new types of caching have been introduced in 9.3 – Server Side Caching through new cache management, extensible caching and the ability to use Redis; Client Side Caching should use default browser cache settings which will cache HTML and Javascript downloads for 30 days or until a new version is installed.

Integrations

New methods for integrations have been developed to work with cloud based products.

App logins have been added to allow applications to have a long term authentication token.

A documented Web Api has been also been developed. Further information can be obtained by contacting Support.

Note: Integrations which update tables directly must trigger a full cache expiration. Failure to do so will result in the application displaying old data from

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	cache. New integrations using the web api's will automatically trigger the updating of the cache.
Email service	A new email service infrastructure has been put into the system that provides views to track the status of Rejected/ sent/ Undeliverable emails sent from the system.
Client Search	The Client Search has been rewritten into the HTML5/ V9 style. It now uses an Infinite grid, with the ability for the user to customise the columns to be displayed, search on any of the available text fields and export the displayed information to csv file.
Batch functionality	Results from the new client search page can now be added to a batch for use with the Bulk Client Admin page.
Contact Search	The Contact Search has been rewritten into the HTML5/ V9 style. It now uses an Infinite grid, with the ability for the user to customise the columns to be displayed, search on any of the available text fields and export the displayed information to csv file.
Staff Search	The Staff Search has been rewritten into the HTML5/ V9 style. It now uses an Infinite grid, with the ability for the user to customise the columns to be displayed, search on any of the available text fields and export the displayed information to csv file.
Grade Defaults	A new Grade Defaults page has been created. This page allows administrators to create default configurations of dashboards, menu's, grid selections and more for staff grades. These configurations can then be applied upon login.
API Authentication Administration	A new API Authentication Administration page has been created to enable developers to manage AppId's and AppKeys.
Password Administration	A new Password Control page has been created to allow system administrator's to reset user's passwords and resend the activation email.
Client SP mapping	A new Client SP mapping page has been added to keep track of any Client Sp's that are in use within the system. This links to a dedicated table to store this information and removed the need for the standard sp's to check for any client sp's. All client sp's need to be managed through this page.
MRU	The Most Recently Used has been restyled.
Task Pads	Task pads have been modified to always display pages in alphabetical order.
Favourites	Support for favourites has been added to grid pages
Help Menu	The Browser details have been added to the Help menu.
Job and Tasks tables	Foreign keys have been added to all tables that reference Job and Tasks.
Schedule pages	An extra row has been included to schedule pages to display Staff Holidays. The Client Code has been added to the Schedule editor. This is displayed alongside the Client Name when searching for a client within the schedule editor. Available Hours will be displayed once a staff member has been selected within the schedule editor. A right click context menu has been reintroduced on the Schedule pages to allow schedule items to be copied, pasted and deleted.
Batch functionality	The batch functionality has been added to all Job grids.
Work Timer	The work timer has been modified to use the elapsed time from the display value.

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Job List views	The Client Short Code has been added to the job column selection list on all job list views. The Rack description has been added to the job column selection list on all job views. An Actual Hours option has been added to the job column selection list on all job list views.
Task Details	The task details panel has been modified to include the Staff assigned to the task and the date that the task was completed.
Assurance request pages	The Assurance Request pages have been restyled.
Request	The phonetic matching of contacts when creating an Assurance Request has been changed from a Soundex algorithm to DoubleMetaphone which supports most western languages and is more accurate.
Assurance Grids	The Assurance Grids now list the names of all entities within the request rather than Assurance Request for ….
Special Portfolios	A scroll bar has been added to the Special Portfolio pages to handle extra wide portfolios.
Billing Guide Portfolio	The Billing Guide portfolio has been modified to include additional columns for Group Name and Entity Type.
Client Rating	The Client Rating list for Business Cards has been changed to use the standard client rating category within Categories Etc.
Prospect Refiners	The refiners on the prospect list now show as 'with opportunities' and 'without opportunities' instead of 'opportunities' and 'just business cards'
Client Prospects Dashlet	'Add Prospect' button has been removed from the Prospect Details Dashlet on the Client Dashboard. The dashlet links have been deactivated if the client does not have any opportunities.
Prospects page	A 'Return To List' button has been included on the Prospects page. Prospect type has been added as an available column on the Prospect Views.
New Staff Creation	The Create New Staff page has been updated to the V9 style. It now also includes additional fields and the ability to assign the staff member to relevant permission groups.
System Lockout	The System lockout page has been restyled to the V9 style.
Security Administration	An option to filter by Security Group has been added to the Security Administration page. This allows the ability to view less security groups on the page when setting group permissions.
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.'

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NEW FEATURES AND MODIFICATIONS IN PRACTICE ENGINE V9.5 (INC V9.4)

Expense and Disbursement 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.
Report 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.
All Prospects	An Events tab has been added to the All Prospects page. This will display all events for all prospects.
Grid Views	A reset option has been added to the Columns option to allow column choices to be reset to the default values. 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)
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.
.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.
Search Screens	Entered criteria within the extended searches will now be retained for the next search.
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.
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.

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DRS Transactions	The cheque number has been added to the Allocation report when viewing the allocation of receipts.
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. 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. 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 budget will only 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.
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 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.
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.

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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.
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.
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: 1. Copy the file /Views/templates/jobs/jobdetails.cshtml to /Client/Views/templates/jobs/jobdetails.cshtml 2. Open the /Client/views/templates/jobs/jobdetails.cshtml file 3. Edit line 19 (remove the @* "at-sign and star") 4. Edit line 25 (remove the *@ "star and at-sign") By default the Job Class field will be hidden.
Assurance Questionnaires	The History associated with an Assurance Questionnaire can be viewed using the Show History button at the top of the questionnaire.
Create New Staff	Staff Initials have been made a mandatory field to make it consistent with the validation on the Staff Details pages.

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