IRIS | Practice Engine

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.

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.

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.

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.

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

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.

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.'

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.

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.

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.

NEW FEATURES AND MODIFICATIONS IN PRACTICE ENGINE V9.6

Mobile Friendly	The Timesheets have had a full rewrite and are now mobile friendly.
Timesheet Views	Users can choose between different timesheet views within the My Timesheets page. Each view displays the information in a slightly different way. Available views are Daily, Weekly and Mobile.
Approval by Job	A new feature has been added to allow Managers to approve time that has been entered to their job.
Timer	A new style of timer has been included.
Timesheet Approval and Posting	There have been changes to the approval and posting of Timesheets. Approval is now completed at the item level rather than the Timesheet Header. Timesheet Headers can be closed by an administrator to remove the ability for staff to add further entries to a timesheet week. An additional check against the staff member has been added to indicate whether the staff member requires their timesheets to be approved. This can be found on the Staff Charge Rates page and will override the timesheet posting status of Complete for the selected staff member.
Job Approval	An additional approval method has been added – Job Approval. This allows Job Managers to approve timesheet entries that have been made against their jobs.
Timesheet Creation	Functionality to support auto creation of timesheets has been added.
In/ Out of Scope	A new field has been included in the time capture screens to indicate whether the work done was In or Out of Scope. The reasons are displayed within WIP and within the billing guides.
Timesheet Favourites and Suggestions	A new feature has been added to Timesheets that allows users to drag and drop favourite timesheet items or suggested items onto the timesheet. Users can mark entries as favourites. Suggestions are created when a user is scheduled to a job or task and when the user views or interacts with a client record.
Timesheet Weeks	Timesheet weeks can be closed for further entries by an administrator. They can also be reopened as required. This will only stop further entries from being made to completed timesheets. Staff who have reached their target hours and all entries

have been marked as complete will not be able to enter further time to a closed week.

Timesheet Completion	The status of a timesheet entry is now held against the entry rather than the timesheet header. This allows time to be processed more quickly.
PElerts	PELerts have been converted to use the Task Scheduler and CRON
Azure AD	Support for Azure AD has been added. This requires PE to be run with SSL.
WIP Recalculation	A new page has been added that will allow an administrator to recalculate the WIP for staff members whose charge rate was incorrect at the time of posting.
Client Origination	A Client Origination page has been added to the system.
Menus	The items within the Manage Menu dialog have changed to be sorted in alphabetical order.
Permissions	A Permissions Cache has been added to the system. This ensures that a user only needs to log out and back in for new/ amended permissions to take effect.
Grid pages	Grid pages have been updated to include a footer row that will display totals for selected fields.
Staff Charge Rates	The default Service and Analysis code have been removed from the Staff Charge Rates page. This is due to changes in Timesheets and the requirement to choose a job rather than a service.
Portfolio Dashlets	Unposted WIP has been added as a figure to the Portfolio Dashlets. This figure can be drilled into and is displayed at all sub levels.
Staff Budgets	A View only option has been added to the Staff Budgets page. This is a new page within the Staff menu task pad.
Client Events	The Client Events page has been modified so that it is now possible to create an event that can be applied to all clients within a client Group. The Events page will display these events with an indicator. The Events dashlet has also been modified to display the number of Group Events associated with the client.
Client Receivables	The Client Code has been added to the header information on the client receivables screen.
Edit WIP Transactions	Disbursements have been included in the Edit WIP transactions option.
WIP Transfers	A change has been made so that WIP transfers can be made to Complete jobs.
Macros	An additional output option has been included for Macros. It is now possible to send the report within a macro to a file location.
Report dates and ranges	Changes have been made to the default tab that reports open at. Clicking onto the report name will open the report on the preview tab. There will also be a new split button that will allow the user to open the report to the dates and ranges tab.
Built in Reports	Reports embedded within the pages of Practice Engine, such as Timesheets, Expenses and Jobs have been modified to use the new report app viewer.
Emailing Reports and Fees	A Close/ Cancel button has been added when emailing reports, fees and statements
Job Templates	A new copy template function has been added to the Job Templates page.
Tasks	The ability to move to the Previous or Next task has been added to the Tasks panel within a job.
Job Screens	All Job screens will now default to the Active refiner on first use. After this the screens will default to the last refiner that the user has selected. This behaviour will continue until the browser's cache is cleared.

Bulk Client Admin A change has been made to provide users with a choice of whether to engage services when adding jobs to clients through the Bulk Client Admin page.

Job Pickup A Job Pickup page has been added to the Taskpad. This page will open the Pickup Jobs page that is also linked to the Tax Return control Dashlet.

Billing Wizard The Draft Comments field on the Header screen has been increased to allow 1500 characters.

An additional option has been added to the Header page of the billing wizard and to the confirmation dialog to allow the user to choose the delivery method for the fee.

Billing Guide The Billing Guide has been updated to display the new Out of Scope information.

Expense Posting The Expense Posting and Expense Report have been updated to include the Description field from the expense allocation details.

Expense Allocations A description field has been added to allocations within an Expense Claim.

Disbursement and Expense Posting The Posting Date has been added to the Disbursement and Expense Posting pages. The default option is set within Transactions Settings, but can be overridden on the Posting pages.

Select All and Clear All buttons have been added to the Posting pages.

Receipt View within Expenses The Save button has been changed to provide two options – 'Save', which will close the Receipt; or 'Save and Allocate', which will take the user to the allocation screen to enter the allocation details.

Foreign Currency on Expenses Foreign currency options have been included on an Expense entry. Changing the Foreign Currency will display a Foreign Amount field.

Expense Submission Highlighting has been added to identify receipts without allocations when submitting an expense claim.

Categories New categories such as new services or disbursements were not being displayed immediately

Leave Types Leave Types have been updated to include Job selection.

Reskinned pages The following pages have been converted from Classic pages to V9 pages:

- Staff Fees (drill down page from Portfolio dashlets)
- Staff Leave List (drill down page from Leave dashlet)
- Staff Lockup (drill down page from Portfolio dashlet)
- Clients Over Limit (drill down page from Portfolio dashlets)
- Staff Production pages (drill down page from Productivity dashlet)
- Staff Receipts page (drill down page from Portfolio dashlet)
- Staff Security pages (drill down page from Security button on Staff Details)
- Staff settings page
- Staff Tasks (drill down page from Tasks dashlet)
- Client WIP Transactions
- Client DRS Transactions
- Staff Rates List. By default this will only display the standard rate. Additional rates can be included with the use of custom columns. Please contact Support for more information regarding custom columns.

Job templates	Additional date placeholders have been added that can be used within Job Templates. These additional placeholders are: [QQ], [PSM, [PEM]
Add Attachments	A Documents panel has been added to jobs. This allow documents to be attached to a job.
Jurisdiction Workflow options	Jurisdiction workflow option have been added to job jurisdictions.
Bulk Staff replace	An option has been added to replace staff in bulk on a specific role. This option can be found within the Bulk job admin page.
Staff Tasks page	The task due date field has been added as a column option on the Staff Tasks page.
E File Status	An additional field has been added to the Job Details to show the E-File Status
Job forwarding	The workflow status has been added to the Job Forwarding dialog within the Job Details screens.
Expense printing	An option to print an expense claim with attached receipts has been added.
Auto Post on Complete at period End	An additional stored procedure has been added to handle auto post on complete entries at period end. This SP will auto post entries that are for the following month as part of the period end process.
Edit button for Service/ Job field	The permission ClientServDet controls whether users can access this button within timesheet entry. This is a new permission.
Expense Approval	A line has been added to the Timesheets and Expense Dashlet to show Expenses waiting for approval.
Task selection	If the job selected only has a single task, that task will now be selected by default.
Audit History	Client Status has been added as an audit change to tblEngagementChanges.
Bank Details	US locale specific options have been added to the bank details. The Bank Sort code will now show as Routing Number and can hold a 9 digit number.
Services Category	It is now possible to add a default charge band to a service category within Categories etc.
Security Administration	Bulk Update options have been added to the Security Administration page for the Organisations, Offices and Departments. These allow the administrator to add and remove users in bulk to the selected Organisation, Office or Department.
WIP Transfers	WIP is now able to be transferred to complete jobs.
Deposits	The ability to reactivate a deposit batch has been added.
Opportunities	Refiners have been added to the Opportunity grids to display – All, Active, On Hold, Sold and Lost.
Staff Budgets	A Read Only option of the Staff Budgets page has been added
Reports	A double arrow allowing the user to skip to the end of a report has been added.
Security Administration	Select All/ Deselect All options have been added to the Security Administration pages where you are required to select groups.
Attributes	The attribute field size was increased to allow 250 characters.
Job Templates	Job templates were enabled for use on Internal clients.
Delete Template button	A check message has been added to the Delete Template button to ensure templates are not deleted accidentally.

Expense Allocations	A date field has been added to the Allocation dialog within Expenses. This allows a receipt date and an allocation date to be included.
Shortcode	The shortcode field within the table tblEngagement has been increased from 20 characters to 50 characters.
Job Code on Create New Job Dialog	The Job Code field has been added to the Create New Job dialog. If a Job Code has been included on the template the Job Code will be automatically populated. However on a manual job, the job code will be generated if the Job Code is not completed.
Timesheets	The analysis code field has been modified to automatically populate if there is only one analysis code available.
Timesheets – Weekly View	A weekly total has been added to the Weekly Timesheet grid. An Additional Drop Down has been included to display Incomplete Weeks.
Timesheet Approval	The Client Code and Analysis Code have been added to the approval pages. A weekly approval option has been included on the approval pages. This will show any timesheets that are ready for approval where the staff member has reached their target hours and the entries are marked as Complete. The Activate button within Timesheet Approval has been changed to read 'Unapprove'. This will Unapprove the entries and the user will see them within their completed entries.
Timesheet Completion	A Check Message has been added to the Complete All action to indicate to the user if there are entries that require more information and cannot be completed. These entries will remain as Active.
Timesheet Posting	An additional column 'Postable' has been added to the Timesheet Posting pages. This shows the amount of time on a timesheet that is actually available to post.
Jurisdictions	When upgrading, the jurisdictions will not be changed if the upgrade process finds existing jurisdictions.
Job permissions	Job permissions have been updated. Each panel has an edit permission attached to it. Giving this permission will allow the user to edit the panel. If users can view the job details then they can view all of the job details. The permission JobDetsView will allow user to expand the Jobs and View any of the Job Details. Without this they will be able to see the Jobs in the various Jobs list but expand the details. JobDets will allow the user to edit the Job Details panel. For further information please refer to the web permissions documentation.
Job Notes	The Job notes area has been reworked to include additional options of Allow Note Text, Complete and Permanent. The Shared option has been removed.
Bulk Release on timesheets	The Bulk Release action will not do anything if any of the days have more than 24 hours recorded.
API – Assurance Request	A new API has been created to allow Assurance Requests to be created using API calls.
Reports when using IE Browser	Internet Explorer does not support the viewing of Reports within the browser. When running a report in IE, a message has been added explaining and providing a link to open the report.
Disbursements	The Disbursement Import functionality has been updated to set a default allocation date based on the date entered on the csv file.

Job Forwarding	The Job Forwarding function has been modified to allow the forwarding of jobs to Unallocated/ No Staff Allocated, either by allocating the Unallocated/ No Staff Allocated to a role or by searching using the search functionality.
Timesheets	An additional warning has been added to the Bulk Complete action within Timesheets. If some entries have a status other than Active, a message will be displayed to indicate that not all entries could be marked as Complete.
Imports	A new standard Import type has been added to Import Maintenance. This allows for deposits to be imported and allocated.
Disbursements	Unit based allocations have been added to disbursements.
Windows Authentication handling	A redirect has been added for NoStaff and a change made to how sign in cookies are issued from Windows auth based on the updated IdentityServer recommendation. The Auth site has been made standalone.
GDPR	A personal consent page has been added to the Contacts section and Assurance request. This allows consent records to be added for person contacts. A Contact Summary View has been created for all types of contacts. This displays a summary of data held for the contact, including basic contact details, relationships, attributes, events, questions and associated clients. An Expired Contact page has been included in the Admin section. This page lists all contacts that have been Inactive for longer than the system retention period. It also displays clients that have been Lost for longer than the retention period. System retention periods have been added to Transaction Settings for Contact retention period and Client retention period.
Timesheets	The Time Entry button within the Job Details has been disabled for Complete and Closed jobs.
Retainers	The reference field on the Client DRS retainers tab has been removed.
Custom Global Management Lists	A framework has been created to allow for up to 5 custom job management lists by service with permissions that can be set in Categories Etc. These can be created from Categories Etc > Main Categories > Custom Job Portfolios. Create a new Portfolio, provide a name, select the services to be included on the portfolio and assign the permissions to it. A server and local cache refresh will be required. The portfolio will then be visible from the Staff Task Pad.
Jobs	The ability to select the role as well as the staff when forwarding a job has been added.
Grid pages	The majority of the grid pages have been changed to use CGrids. This applies only to the Chrome browser due to IE and Edge having issues with this feature. The CGrids allow the order of columns to be set as well as the column width.
Custom Auditing	A new feature was added to allow custom auditing as a standard feature. It has been added as a new Categories Etc option to allow database columns to be audited. The data is stored in tblAudit.
Client Search	A checkbox had been added to the Simple Client Search to allow the user to set the search to remember the search criteria when navigating away from the page.
Bulk Client Admin	A change was made to set the Partner and Manager fields as blank on the Bulk Client Admin screens. If left blank the created jobs will inherit the service level partner and manager. If a partner or Manager is entered the jobs will use the entered data.
Client VAT number	The field has been expanded to hold 25 characters.

Job Templates	A code fields has been added to the Master Task when adding it to a job. Tasks can be searched for on the task name. The subject field uses an auto complete function.
Bulk Job Admin	The order of the actions within the Bulk Job Admin was changed. The Delete action was moved to the end of the options and a Please Select option was added to the top. An option to Replace Staff on Roles when no staff are assigned has been added to the Bulk Job Admin page.
Job Notes	Options were added on the note to set whether the notes should be rolled over to the next job and whether the note should be deleted when the job is rolled over.
Bulk Update pages	The option to export the review log to CSV was added to the Bulk Update pages.
Job Jurisdictions	An option to Extend All was added to the Jurisdictions tab of a job.
Job Details page	A back button was added to the job details page when the job is open in full page mode.
Link to Scheduling app	A link has been added to the Jobs pages to navigate to the Scheduling App if being used.
Job Actual Start Date	The actual start date is a system generated date that was generated when time was entered to the job. This has been modified to also update the start date when the job is moved to an In Progress status. Additionally, if the job is changed back to Not Started and does not have any WIP against it, the start date will be removed.
Job Name Variables	Additional variables have been created to be used in the Job Name and the Job Code on a Job Template. [PSD] – will return the 2 digit day from the Job Period Start date. [PED] – will return the 2 digit day from the Job Period End date.
Prospects	Additional refinements were made to the Prospects pages. These included: Events have been listed in date order The Events refiner includes tabs for All, Future and Complete events. The Hours label on the opportunity details was changed to Units. The Incumbent Accountant label was changed to Incumbent Supplier
Auto Population of Roles	The facility to auto populate Job Roles has been included. These settings can be found on the Job template.
Expense approval	A search field has been added to the Expense approval pages.
Timesheets	A Classic option has been included on Timesheets. This includes an option to enable via Timesheet Admin, and once enabled will display a Complete button against each timesheet header. Once the user has marked the Timesheet header as Complete the timesheet will be displayed within the Classic Approval pages for approval.
Expenses	Receipts can be attached to unit based allocations to allow fuel receipts to be added to mileage claims. This is controlled by a setting within Transaction Settings.
Client Budgets	The Client budgets page has been reskinned into V9 styling.
Bulk Job Admin	An option to include Budgeted Staff has been included in the Replace Staff option of the Bulk Job Admin page. To include budgeted staff, the 'On Job Budgets' checkbox must be selected.

Tax Job Due Date Auto Recalculation	If due dates have been changed on jurisdictions within Categories Etc, the SP – pes_jurisdiction_reaclculate will be applied to all outstanding jobs that have the affected jurisdiction attached causing the due dates to be updated.
Job Grids	A column to display the Template Description has been added to all job grids. A new column to display a Late Filing status has been added to all job grids that include Tax jobs. The status will be displayed if the jurisdiction is set as Late on the job.
Toggle Width	The Assurance, Prospects, Job Lists, Portfolios and Management pages have been set to automatically toggle the width to use the full screen size.
Job Template	Additional options have been included on the Job Templates to indicate what Office and Department to use. The options now include Use Client Office/ Department and use Service Office/ Department.
Job Rollover	A modification has been made when rolling a job over to allow the new job budget to be created from the existing budget. The rollover now has the option to create from existing or to create from actual. An option has been added to exclude Out Of Scope time when rolling the job over.
Tasks	A task usage field has been added to tblJob_Task to allow some tasks to be marked as valid for time entry whilst others are only for deadline tracking. A new checkbox has been included on the Task Details to indicate whether the task is available for time entry
Job Workflow Status Permissions	The workflow status permissions have been updated to display all workflow statuses, but the logged in user will only be able to available to be selected.
Build 9.6.6913	
Client WIP by Job SP	Changes were made to this stored procedure to improve performance.
Ownership Portfolio dashlets	The Ownership portfolio dashlets have been modified to allow users to view more detail of transactions within the corresponding grids.
Staff Charge Rates page	If changes are made to the 'Auto Post on Complete' setting on the Staff Charge Rates page, a check message will be displayed to indicate that any Complete Timesheets will be posted.
Prospect Events	Prospect events have been updated to now display all events that a user has created in the My Events List regardless of who the event was assigned to.
Categories Etc	The View option within the Permissions node was removed as it is no longer used within V9.
Printing Fees	If the client does not have an email address set within the Credit Contact email field, the option to email the fee when the fee is confirmed will not be available
Client Staffing	When updating the Client Partner or Manager from the Client Staffing page, it required the user to click onto the Partner/ Manager button after adding the new staff member. This page has been modified to automatically set the new client partner or manager when a new current staffing is set with the relationship of engagement partner or manager.
Impersonation	Changes were made to allow the Impersonation login to work with Windows Auth sites.
Mobile Timesheets	The date field has been made editable to allow for time entries on other days.
Login security	The message when logging in with invalid credentials was made more generic to increase security.

Update Partner/ Manager	The Update Partner/ Manager page has been rewritten to allow staff to be replaced at the client, service and job level in the partner, manager and in charge assignments.
Bulk Job Admin	New options have been added. • Reapply Template – allows changes to templates to be applied to jobs that have already been created. • Update Tax Type – allows the tax return type to be updated to jobs that have already been created. These options will also be implemented when a job is being rolled and the template has been updated.
Build 9.6.6976	
Client Actions Dashlet	The client actions dashlet would incorrectly display the status of a Suspended client as Lost when trying to enter time against it. This has now been changed to display the correct status.
Job Note Types	Job Note types have been added to allow for Job Notes to be categorised and for default values to be set against the note.
Job Document Types	Job Document types have been added to allow for Job Documents to be categorised and for default values to be set against the Document.
Build 9.6.7090	
Job Modifications	Job changes were made to the note categorisation, document categorisation and Jurisdiction notes. A Job WIP Summary was also added as a new panel displaying the WIP Summary data that used to show in V8 Job Details View.
Build 9.6.7122	
Date pickers	All instances where the native browser date pickers were changed to use the custom date picker used by Practice Engine.
Performance	Current SplitString and StringSplit UDF calls were replaced with calls to the new built in STRING_SPLIT function.
Job WIP Summary	The Job WIP Summary panel had been updated so that the information can be viewed By Staff, By Role or By Task.
Build 9.6.7166	
Job Templates	An additional template placeholder has been added – Q#. The Q# is based on the job period start, so if [QY] is added to the job template name the created job will have either Q1, Q2, Q3 or Q4 attached to the job name.
Build 9.6.7249	
Staff Details	The Person Title fields were increased to 50 characters for Staff Details, when creating new Staff, and in Assurance.
Job modifications	An “Are you sure?” prompt was added when clicking the delete button for a jurisdiction. Once deleted it is not removed from the system but is added to the deleted notes tab. An “undelete” button was added to undo a mistaken delete action. A Jurisdiction history tab was added to view added, removed and any status updates on jurisdiction notes. A column was added to the notes list to indicate if and what jurisdiction a note is connected to. A tick box was added for each jurisdiction to indicate if it should be paper filed.

	A permission was requested to override specific fields as editable. This permission was added and is called “JobWorkflowUpdate”.
Categories	The departments categories were using ServIndexes. This has been changed to use DeptCat and a new category added called “Department category” which will show in the category drop down list under special categories and departments.
Client, Staff and Job exports	Changes were made to the Client, Staff and Jobs export.
Staff Search	The staff search was changed so that on arrival to the search page if no previous search had been saved and the search field was empty, then a search is not conducted unless the user inserts 3 characters or more to start it.
Contact Search	The Contact search was changed so that on arrival to the search page if no previous search had been saved and the search field was empty, then a search is not conducted unless the user inserts 3 characters or more to start it.
Client Search	The Client search was changed so that on arrival to the search page if no previous search had been saved and the search field was empty, then a search is not conducted unless the user inserts 3 characters or more to start it.
Timesheets	The Analysis column has been added as a default column to the timesheet grids
Emails	The 30 second delay from email service was removed.
Build 9.6.7314	
Job Schedule	When using the schedule button on the management panel of the client’s job details, the system was changed to insert the logged in user, the client and the job to the entry.
Timesheets	If a user created a new timesheet entry and clicked on the Edit button next to the service/job line and engaged a service, the partner and manager were blank by default. This was changed to default to the Client level partner and manager, with the ability to change them if needed.
Jobs	It was found that a user could access other user’s notes, make changes and save them. It was decided that updating the notes would be allowed but that the system would keep an updated by value as well as the owner. A change was made to the CurrentDueDate calculation to not clear when all jurisdictions are complete.
Build 9.6.7368	
New Staff creation	A new license details grid has been added to the New Staff creation page. This grid details the number of licenses available and in use for the license types of Full User, Intern User and Nominal User.
Security Admin	Using the Space Bar and Tab buttons at the same time allows all users to be displayed.
Build 9.6.7397	
Reports	Clients were accidentally deleting reports from report admin, by clicking the delete button on a report. A check message was added to ask users whether they are sure they wish to delete the report before the action goes ahead.
Timesheets	A Cancel button was added to the locations dialog screen that appears when editing the locations in timesheets. This returns the user to timesheet entry view, with no changes to the existing location details.
Expense posting	A change was made to the expense posting SP, adding the Staff Name to the narrative.

Build 9.6.7506

Database	SourceIndex and a new constraint has been added to WIP transactions to avoid double posting