IRIS | Practice Engine

Version 9.6 Builds

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VERSION 9.6 BUILDS

BUILD 9.6.6309.31867

FIXES

Timesheet Posting List returns no data
6576 If the names of the Staff's Office didn't match the code for the office in categories then no staff were being listed for timesheet posting, that were assigned to that office.
-Reported by Andrew Hambly

BUILD 9.6.6317.27612

FIXES

Cannot view receipts once saved to the expense receipt
6468 – It was found that once the receipt image or document was added and saved to the receipt, you then couldn't download the item and view it either in receipts view or within a claim.
-Reported by Victoria Stephenson

Timesheets Job editor added a blank job
6542 – When editing a job using the job editor function within the timesheet entry if the status was changed on a job from in progress to not started and the changes saved, once the browser was closed and you returned to the service and job editor, a blank line was created with an edit button beside it. Unfortunately, you couldn't remove it.
-Reported by Victoria Stephenson

MODIFICATIONS

Timesheet Admin- Grid added underneath created weeks' buttons
6509 – A grid was added underneath the create weeks' buttons to visually show users the created weeks and periods to better see what has been created.
-Reported by Victoria Stephenson

BUILD 9.6.6337.28890

FIXES

Cannot click on the first day of the week
6573 & 6698 If you clicked on the first day of the week within the calendar in timesheet entry, the previous week was being loaded.
-Reported by Victoria Stephenson

Timesheet Dashlet listing incorrect number of timesheets
6574 The timesheet dashlet was incorrectly listing active and overdue timesheets. If a week had a new month starting at any time within it, the timesheet dashlet was still reading that as two separate timesheets, as older versions would have. This is not now the case in 9.6- the week is treated as one regardless of another month starting within it.

-Reported by Victoria Stephenson

Job number not being added from within Assurance

6676 Once a client had been set up within assurance and approved with services and jobs on it, when returning to the assurance request, the jobs weren't showing. If, however you went to the jobs ON the client, the jobs were showing. A job number was not being applied on set up, so if you came to deleting the client at any time, then the jobs would be left behind.
-Reported by Victoria Stephenson

Clearing WIP totalling zero in a zero bill

6638 The system did not let you clear WIP totalling zero in a zero bill. For example, if you had a line of 100 and another of -100 in previous versions, you could create a zero bill and just confirm it. In the current version, an error was appearing "The value of write off is less than or equal to zero". You couldn't get around this by going to the fee portfolio and selecting "WIP Allocation" to allocate debits and credits as the system then created a zero bill, which then couldn't be confirmed because the total was zero.
-Reported by Tony Doyle

Client/Contact Dashlet- Letter Printing Dashlet not working

6589 When adding the letter printing dashlet to either the client or contact dashboard, it was not loading.
-Reported by Tim Johnstone

Allocation removal issues within Expense claims

6518 When in an expense claim, if the user removed an allocation for a freshly created receipt, using the delete icon from the allocations grid, then the allocation amounts remaining on that receipt and any others in the claim were showing incorrectly.
-Reported by Victoria Stephenson

Rejected timesheets missing rejection reason, date and time

6510 The reason why a timesheet was rejected, who rejected it and when, was missing from rejected timesheet details. N.B. You can edit a rejected entry whilst it's status is rejected, or you can activate the entry to send it to the timesheet entry list to edit.
-Reported by Victoria Stephenson

Timesheet grid totals incorrect

6653 The totals showing in the timesheet grids were showing incorrect amounts.
-Reported by Ellis Birt

Timesheet Headers could be changed when status was complete

6112 When in Timesheet Admin, Manage tab, if you selected a week and set the status filter to be "complete", if you then opened the header on an entry and made some changes you were able to save them. This shouldn't be the case on a header when it's status is complete.
-Reported by Michelle Harris

Sorting Errors in global job grids

6778 Some columns within the global job grids were not sorting correctly.
-Reported by Brad Podzius

Unable to close Job editor when editing from within a timesheet entry
6300 It was found that when editing jobs within the jobs editor in the timesheet dialog (click the edit button beside the jobs field in timesheet entry) you were unable to close the job editor screen.
-Reported by Victoria Stephenson

Last week button not working on Others Tab
6795 It was found that when on the others tab in weekly timesheets, if you selected a prior week and clicked the "last week" button (the double arrow button beside the calendar), the week did not change as expected.
-Reported by Ryan Posener

Save button showing on existing entry on opening to view
5904 When accessing an incomplete existing entry to view its details, there was save button showing at the base of the panel. At the point of opening when no changes have been made, the save button shouldn't have been showing, just the cancel or delete buttons.
-Reported by Victoria Stephenson

Unable to add time to a weekly timesheet entry once some time is already posted
6766 If you opened a weekly timesheet, and one entry that week was showing as posted, if you added another entry on another day and attempted to save it, you would receive an error message- "Timesheet details cannot be saved. Some of the requested details are already POSTED".
-Reported by Ellis Birt

Entries for same client and same day not displaying the same between weekly and daily views
6048 If you added an entry in weekly view for the current day, adding some time, then clicked onto next, and keeping all the details the same, added some time for this entry, clicked onto next button, then again, added more time keeping all details the same then clicked save, you would see that the weekly view was displaying the one entry for the 3 entries, which is correct as it rolls them together, as the details are the same. In daily view however, the same time was being displayed as 3 separate entries which is incorrect.
-Reported by Michelle Harris

Complete all option not working if there were some incomplete entries in the grid (weekly view)
6690 If you tried to "complete all" active entries in the grid, if any incomplete entries were showing in the grid, then no entries were being marked as complete. The system should have been completing the entries that were active and had all details entered, and disregarding the incomplete ones.
-Reported by Michelle Harris

BUILD 9.6.6361.32224

FIXES

Activating Complete entry in Jobs View
5976 When within the jobs view in timesheet entry, and on the complete tab, when clicking on an entry to open it in panel view for editing or viewing details, if the activate button was clicked the entry was correctly shown as complete and shaded in green. When re-opening the panel view the entry showed all fields as editable even though the entry had been set as complete.
-Reported by Victoria Stephenson

Entering staff name in search filter on others tab

6745 In My Timesheets, Others tab, when entering a staff name to filter the results by, the results shown in the grid were not filtered appropriately.

-Reported by Brad Podzius

JRIndex on newly created jobs not set correctly

6779 The link from Task to Role wasn't being updated to the actual role JRIndex when a job was created from a template or rolled over.

-Reported by Brad Podzius

Jobs view available buttons

6983 If using Jobs view in My Timesheet entry, if you added an entry and clicked save, the buttons available in the panel view were, Cancel, Delete and Complete. However, when clicking on the actions button the options on that entry were Delete or Release. The settings within timesheet administration were such that only Complete should have been showing, not release.

-Reported by Victoria Stephenson

Grid presenting current day for the previous week with space for the timer

6418 When in weekly view, the current day of the week shows the timer, and the column is widened to accommodate it. However, it was found that if you went back a week, that the corresponding day was also showing a larger column, but no timer was within it.

-Reported by Victoria Stephenson

Deletion of jobs not being reciprocated in the new allocation drop down

6808 In expense batches, if a client's job had been deleted, if you were to add a new allocation within an expense batch, the jobs list was not being updated, and the deleted jobs were listed. At this point the user was able to book expenses to a closed job.

-Reported by Victoria Stephenson

Month end analysis displaying warning message for unposted timesheets incorrectly

6790 The month end analysis was warning about unposted timesheets, but when clicking on the link, no details could be found.

-Reported by Michelle Harris

Disbursement batches screen not loading correctly

6984 The disbursement batch screen was loaded incorrectly loaded. Missing tabs, action buttons and the grid list.

-Reported by Victoria Stephenson

Create new weeks with headers button creates all timesheets with status of Posted

7103 When in Timesheet Admin, if you clicked on the "Create next week (with headers)" button, the timesheets were created but the headers had a status of Posted.

-Reported by Victoria Stephenson

MODIFICATIONS

Authentication checks

6820 All ASPX pages were updated to include an authentication check.

-Reported by Andrew Hambly

Job Questionnaires changed to Version 9 styling
7000 Questionnaires in Job Details were changed to load a version 9 page rather than opening classic Version 8 dialog.
-Reported by Andrew Hambly

Change password link added
7041 There was no easy way for a user to access the change password facility. A change password option was added to the Home Menu.
-Reported by Ryan Posener

BUILD 9.6.6397.27852

FIXES

Incorrect Currency shown on the beginning of the Fee Wizard for a foreign currency client
7099 It was found that if a client had been set up as foreign currency, when clicking on the draft fee button from the fees dashlet on the client, the figure for the DRS O/S (Debtors Outstanding), below the WIP Available figure, was shown in the incorrect currency. Instead of being shown in the client's currency, it was instead being shown as the local currency, which is set on the users' browser.
-Reported by Victoria Stephenson

"Include" Drop down field in contact search not filtering results
7120 When in the contact search screen on the extended search tab, if you changed the "include" drop down, the filter was not applied and the results not sorted by your selection.
-Reported by Brad Podzius

Forgotten Password misspelling and no email sent to user
7109 When clicking on the forgotten password link on the log in page, there was a spelling mistake on the page and when filling in the email address and clicking "send password reset email", the confirmation that the email had been sent was showing, but the email was not received.
-Reported by Victoria Stephenson

Timesheet copy function removes entry from initial day
7108 When copying an entry from the current date, and clicking "New from Copy" and clicking save, the entry was added to the new day but on returning to the current day, the original entry had been removed.
-Reported by Victoria Stephenson

Details missing from client once Assurance process is completed
7197 It was found that certain details were not being saved when completing an Assurance request fully. Once completed, when accessing the client's details, information was missing that had been entered in assurance.
-Reported by Victoria Stephenson

Client Status added to tblEngagementChanges
7257 An extra column called "ClientStatus" was added to the table "tblEngagmentChanges".
-Reported by Michelle Harris

Negative Time entry error
7172 When entering negative time on timesheets an "invalid value for this metadata" error appeared, so this was fixed to ensure negative time entry was valid.
-Reported by Brad Podzius

Assurance questionnaires navigation
7281 When in assurance and completing the final stages by saving and submitting questionnaires for approval, the user was not being returned to the same screen with the search description originally entered. If you started from the "All assurance questionnaires" page, with a search criteria in the search field, once you had opened, saved and submitted a questionnaire for approval, the questionnaire would be closed and the user directed to the "Assurance questionnaires for (insert logged in users name), and the search criteria you had entered previously had been cleared. The page shown was labelled differently and a different number of questionnaires was being listed.
-Reported by Victoria Stephenson

Transaction setting for suspended clients not supported
7318 The transaction setting "TranSetLockSuspended" when set should ensure that suspended clients should not be available for selection or posting. If this setting is NOT set then selecting a suspended client should trigger a warning and prompt the user by asking them whether or not they are wanting to log time to a suspended client. It was ensured that the system supported the afore-described settings.
-Reported by Ryan Posener

Timer stopping when separate entry is completed
7259 It was found that when starting a timer in weekly view, if another entry listed on the grid was then marked as complete, the timer was stopped.
-Reported by Victoria Stephenson

Completing Negative timesheet entries
7334 When marking a negative time entry as complete using the actions menu, an error message was displayed "The timesheet cannot be completed because of the following problems…". However, if "Complete All" was selected from the gears icon, then the negative entry was marked as complete along with all the other entries on the grid. This was corrected.
-Reported by Victoria Stephenson

Unable to save and complete an entry from entry dialog screen
7322 When creating a new timesheet entry in Daily View, entering all details and then clicking on the "save and complete" button, an error message was produced by the system "The Timesheet cannot be completed because of the following problems…". The same error message would appear if you saved the entry then used the actions menu button to complete the entry. This was fixed.
-Reported by Michelle Harris

No save and complete available for negative entries (daily/weekly)
7340 The save and complete button was missing from the entry dialog when adding negative time. The save and complete all in one action was added to allow the same functionality as positive time entry.
-Reported by Victoria Stephenson

Cancelling Leave request that's been applied doesn't remove it from the calendar
7287 Cancelling a leave request when part of it had been posted to timesheet was leaving the entry in the database so when the next timesheet headers were created, the leave entries were added. This has now been prevented.
-Reported by Andrew Hambly

Approved leave not showing in weekly view
7339 Once a leave request was submitted and approved, when going into global leave approval from the admin menu and approving the entry, on returning to my timesheets the entry wasn't showing.
-Reported by Victoria Stephenson

Release/Complete All on Others tab
7325 When completing or releasing time on the others tab, instead of completing or releasing the time for the selected user, it was affecting the time for the logged in user.
-Reported by David Kelso

Release message removed when using complete all action
7348 It was found that when clicking complete all within timesheet entry, that the check message for entries set to auto post was being shown. This should only appear when releasing time, not for time that is being completed.
-Reported by Victoria Stephenson

Dragging items in department diary not working properly
7324 When in portfolios and department schedule, click to show availability, if you dragged a scheduled item down to a staff member, the item was not shown, and the grid was not updated with the new item for the staff user.
-Reported by Michelle Harris

Job Control Dashlet
7323 From the staff dashboard and the jobs control dashlet, when clicking on any of the numbers on the mine or on my desk, the link wasn't taking the user anywhere, when it should in fact take you to the staff jobs pages.
-Reported by Michelle Harris

Copying special leave and completing displaying empty error message
6707 When selecting special leave from one day and adding it to another without editing and then completing, an empty error message box was displayed. If you edited it and clicked to complete then another error message was displayed.
-Reported by Michelle Harris

Changes to auto post were not immediate
7333 When settings had been changed to allow the time to be completed from being released, the menus weren't changed and neither were the actions. Instead of the time being set as complete, the entry was instead released, and then posted.
-Reported by Victoria Stephenson

Unable to create a new Job
7200 It was found that when creating a new job from a template on a client, that when you clicked "create", a 'Job_Code' error was displayed, preventing the job being created on the client.
Linked to

7244 An Assurance error message was presented when clicking "approve" on an assurance request. The same 'Job_Code' error message was displayed as there was an issue saving jobs.
-Reported by Victoria Stephenson

MODIFICATIONS

Layout of security Administration pages
7179 The layout of the Security Administration page seemed to show a large empty space at the top of the page, which moved the grid much further down the page. This large gap was showing for the Permissions and Dashlets tab in Security Administration.
-Reported by Victoria Stephenson

Add extra job name date placeholders for quarters and months
7185 The ability to add the following to a job name was added: [YYYY] [QQ] [PEM] [YY]. This would add extra information to the Job Name, such as the Year, Quarter, Period End Month and Period Start Month. For example, a job set up in the templates to be "Practice Engine Test [YYYY] [QQ] – [PEM] [YY]", would show on a newly created job as "Practice Engine Test 2017 Q2 – Apr – Jan 17".
-Reported by Andrew Hambly

Button added to print expense claim and attachments
7089 The option to export an expense with attachments was added to the print button. Once exported, both the report and attachments can be printed out.
-Reported by Brad Podzius

Assurance Services listed Alphabetically
7242 It was found that the services list in Assurance wasn't alphabetised. This was corrected to allow users to easily locate services from a long list.
-Reported by Tony Doyle on behalf of Price Bailey (10842)

Limit Job selection to those jobs where you are member, if "Limit Time Entry" is set on Job.
7331 Previously if you had a job that had "Only People in Roles Can enter time" selected, that setting was not being honoured on the timesheets and would show for users who were not set to have roles on the job when entering time.
-Reported by Ryan Posener

Expense entry for service/job same layout as time entry
7258 It was suggested that it would be helpful for the jobs field in the receipt allocation dialog within expense entry to have both the service and job listed, as in timesheet entry, to help users easily and quickly identify the job and service they wish to select.
-Reported by Michelle Jenkins on behalf of Muellor Prost

Add Jurisdiction workflow options to job jurisdictions
7251 You are now able to add jurisdictions on jobs. In order for this to work you will need to have set up jurisdiction statuses in Admin > Categories.
-Reported by Andrew Hambly

Re-Activating Lodgement batch
7389 The option to Re-Activate a Lodgement batch was inserted.
-Suggested by Tony Doyle

Quick Add services facility

7243 In earlier versions the ability to quickly select and add services within assurance was available. This was added for version 9, to allow the assurance process to flow quicker.

-Reported by Tony Doyle on behalf of Price Bailey

BUILD 9.6.6409.19211

FIXES

Approved leave not showing in weekly timesheet view

7339 When a leave request was created, submitted then approved from global admin, when returning to the timesheets view, the leave request was not showing on the timesheet week.

-Reported by Victoria Stephenson

Timesheets being created with a status of posted for weeks that had no working days

7393 When a timesheet was created for a week that had no “working days” and the target hours were “0” (for example, if a new month started on the weekend), the header was being created with a status of posted, when it should have been Idle/Active.

-Reported by Brad Podzius

First day of leave not displaying in timesheets

7406 When Timesheet headers were created for a week where an approved leave request was present, the first day of the leave request block didn’t appear in the weekly timesheet view. The first day was being missed out.

-Reported by Andrew Hambly

Error message displayed when adding time for other users (IE)

7399 When entering time for other users from the others tab in timesheet weekly view, once you either saved, or saved and completed the entry for the user an error message appeared “Timesheet details cannot be saved. There is no valid timesheet header for these dates”. The error message was incorrect and wasn’t recognising the existing header entries.

-Reported by Victoria Stephenson

Timer running to midnight causing >24 hours recorded for the day

6322 It was found that if a timer had been running to midnight that it was possible for more than 24 hours to be recorded in one day, even if existing entries for that day exceeded the time already elapsed in the day.

-Reported by Ellis Birt

When starting a timer an error message occurred

7435 When in timesheet entry, if you clicked to start the timer on an existing entry, and error message was produced: “Nullable object must have a value”. On dismissing the error message if you then navigated away from the timesheet entry page and came back again, the timer was stopped and the time elapsed cleared.

-Reported by Victoria Stephenson

Error message on starting timer with only the client name entered (daily and weekly)

7417 When creating a timesheet in either daily or weekly view, if you entered only the client name and then started the timer, and error message was produced: “Nullable Object must have a value”.

-Reported by Brad Podzius

Jurisdictional statuses not showing within workflow function on timesheets
7423 It was found that the workflow button within timesheet entry was not showing the updated jurisdictional statuses.
-Reported by Brad Podzius

Missing Manage tab in Security Admin
7403 It was found in Security Admin that the Manage tab was no longer present, and this was preventing a staff search to allow you to see what groups the staff user was a member of.
-Reported by Tony Doyle

MODIFICATIONS

Bulk Job action added to replace staff of a specified role
7369 The ability to replace staff and replace staff for a specified role was added to Bulk Job Admin. Please note: A member of staff has to be present on that role before you can use the option to replace it with another. A role cannot be replaced if no user is already present on it.
-Suggested by Brad Podzius

Add list of file attachments to a job
7250 A documents tab was added to jobs view, with an Add button in order to attach files to a job. Here you can upload and save a document to your job. You can also delete a document once loaded.
-Reported by Andrew Hambly

Timesheet Suggestions sourced from scheduled items needed a description
7201 For scheduled items appearing on timesheets as a suggestion, if two items for the same week were present, there was no way of identifying which was which. A date was added to help identify similar entries.
-Reported by Michelle Harris

BUILD 9.6.6414.24585

FIXES

No billing client details displayed when edit permissions removed for collection details page
7416 When editing permissions to allow read-only viewing of the client's collection and DRS details were removed, the billing client field wasn't being displayed.
-Reported by Brad Podzius

Time Entry button from a job not working
7415 When opening a job on a client and clicking on the "Time Entry" button top right, nothing was happening. The user was not being directed to the time entry area.
-Reported by Brad Podzius

Timesheet header status not displayed as posted in Manage tab of Timesheet Admin
7426 When in Timesheet Admin on the Manage tab, the status on the timesheet header was not being updated to Posted.
-Reported by Ros Hambly

Jobs set up with roles and analysis codes not being pulled through on time entry
7419 When setting up a scheduled task and pulling it through via the suggestions function within timesheet entry, the Analysis details were not being pulled through correctly, and were also not defaulting to what was set up on the Task.
-Reported by Brad Podzius

Adding all timesheets in timesheet selection adds a blank line in posting list
7424 In timesheet Administration, if you clicked on the add all timesheets button in the timesheet selection page, then clicked on the posting tab, the posting list had an extra entry within it that was blank.
-Reported by Ros Hambly

Posting timesheets not removing them from the list in posting or timesheet selection tabs.
7425 If the user added a timesheet for posting from the timesheet selection page in Timesheet Administration, then clicked on the posting tab in order to post it, once posted the timesheet was neither removed from the posted list nor the timesheet selection list.
-Reported by Ros Hambly

MODIFICATIONS

Addition of SP for Auto-Post on Complete at Period end
5923 If you had the system set to post time automatically to month end and you entered time for the next month and released it, then when you run the period end, the time should show as Posted.
-Reported by Michelle Harris

Allow WIP transfers to jobs with a status of complete.
6061 It was decided that WIP transfers within bills should allow transfers to and from jobs with a status of “complete”.
-Suggested by Tony Doyle and Andrew Hambly

Apply images of receipts to expenses report printout
6747 It was suggested that images and attachments on receipts be included when printing an expenses report. These can now be found at the end of the report when selecting “export with attachments” from the print menu.
-Suggested by Mike Francis and Brad Podzius

BUILD 9.6.6418.26690

FIXES

Client Group and Billing Client
7472 When adding custom fields to the search pages on a client site, once the client had an update to their system, the custom fields added to the initial build were being wiped.
-Reported by David Kelso

Non-Unit based allocations allowing expense codes that use units
7463 Non-unit based allocations shouldn’t allow expense codes that use units.
-Reported by Tim Johnstone

Approved and posted leave not displayed correctly in department diary

7422 The leave entitlement list wasn't showing the full amount of leave posted, only the first couple of days.

-Reported by Michelle Harris

Assurance fields not translating from tblVEngagement to tblEngagement

7470 There were some fields that were not being translated from the contact record through to the client record once the assurance process had been completed.

-Reported by David Kelso

Timesheet approvals when TimeReview permission applied

7471 Permissions relating to the restriction of access to the staff approval pages weren't working correctly. When applied the permissions should allow the logged in user to access timesheets of staff they are approver for, when removed the permissions should prevent access to the staff approvals pages.

-Reported by David Kelso

Service rate not being pulled through tblServices when engaging service from timesheet entry

7475 When engaging a service from within a timesheet entry, the service rate was being defaulted to "percentage of standard" as opposed to whatever had been set on the service within categories, under the service rate type.

-Reported by Brad Podzius

Transferring WIP from one client to another

7458 It was found that when transferring WIP from one client to another within Billing wizard, that you had to know the clients code, and enter the full code for the system to add the client to the "transfer to" field. It would not accept part codes or partially typed names.

-Reported by Victoria Stephenson

MODIFICATIONS - 9.6.6418.26690

Update bank sort code to allow 9 digits for US Routing codes

7461 In the US the bank sort code is called the Routing Number. The Routing number on a bank account should be able to hold a 9-digit number.

-Reported by Mike Francis

Workflow status update option on job forwarding

7469 The workflow status was added as an option when forwarding a job through the job forward dialog screen.

-Suggested by Andrew Hambly

Change the XLS file extension to XLSX

7451 In report macros, XLS file attachments are actually formatted as XLSX. A change was made to change the XLS file extension to XLSX.

-Reported by Michael Caltagirone

BUILD 9.6.6432.19499

FIXES

Timesheet MinDetailID calculations not working
7516 On occasion user's time was not appearing in the list on the timesheet page, but was present in the tables and on the timesheet print. This was due to a new column in TblTSO_Details called MinDetailID. That should be the minimum DetailIndex for that particular Job or Task within that timesheet header. It was found however that on occasion it stayed on 99999999 which isn't a valid DetailIndex, so that prevented the entry appearing on-screen when viewing timesheets for that week.
-Reported by Adam Morgan

Entering time just using the timer not setting the time value just the hours
7524 If you set a timer on a timesheet entry and stopped it with time on it, when navigating to the clients WIP and drilling into the unposted WIP you should be able to see the entry. The entry wasn't showing, so a change was made to correct this.
-Reported by Andrew Hambly

Posting Expense through billing before expense was submitted meant it got posted twice.
7525 When you had an active expense claim (i.e. not submitted or approved), and one or more of the allocations were brought into the bill through the "add unposted WIP option", then the allocations were reset to complete from posted when the claim was submitted.
-Reported by Michelle Jenkins

Notes columns not displaying notes from an entry in the weekly or daily timesheet grid
7507 When in timesheet entry, the notes column wasn't displaying the notes from an entry in the timesheet entry grid. This was found to be the Internal notes on an entry, and was re-labelled as such.
-Reported by Victoria Stephenson#

Typo in Print statement error message when printing in an IE browser
7490 From the client dashboard and financials dashlet, if you clicked on the DRS figure, then the print tab, statements and print, you were presented with an error message informing you that the IE browser does not support the previewing of PDF files, though within the error message, there was a typo. This was corrected.
-Reported by Victoria Stephenson

Disbursement search field not working and filtering
7487 If you entered a name into the search field in disbursements no results were being shown in the grid, and therefore the search filter function was not working.
-Reported by Victoria Stephenson

MODIFICATIONS - 9.6.6432.19499

Client lookup automatically select the client if only one matches
7434 The client lookup within timesheet entry was changed to automatically select the client if what you typed matches only one client within the system.
-Suggested by Ryan Posener

Add Timesheet setting for drop down default behaviour
7433 The system was changed to force the system to automatically select the task during timesheet entry if there is only one task in the drop down.
-Suggested by Tim Johnstone

Reports configuration changed to convention-based auto-configuration
7511 Changes made to simplify and ease the deployment and configuration of reports.
-Suggested by Ryan Posener

BUILD 9.6.6436.18351

FIXES

Saving an entry with a timer shows blank details in the list (mobile view)
7484 It was found in mobile view, timesheet entry, if you created an entry and started the timer, when clicking the save button in the dialog, all previously entered details were lost- Client, Job, Task, Analysis. On Re-opening the entry the details previously entered had been cleared, though the timer was still running.
-Reported by Victoria Stephenson

Posting expense through billing before expense was submitted, posted entry twice
7525 If you had an active expense claim, and brought the allocations through when billing via the "add unposted WIP" option, the allocations were reset to complete from posted when the claim was submitted.
-Reported by Michelle Jenkins

Timesheet Rejection emails used the incorrect "To" and "From" addresses
7539 If you rejected a timesheet for a staff member then the email was sent to you, not the person whose timesheet was rejected.
-Reported by David Kelso

Error message when trying to log time for a day with no header created
7535 An error message was presented when users tried adding timesheet entries for a date that had a timesheet created but not the timesheet header.
-Reported by Ellis Birt

Print presenting an Input String Error message
7503 When printing from the Others Tab in timesheet entry, an Input String Error message was produced. This error message was dealt with, though you will need to have a user selected in the search field in order to successfully print from this screen.
-Reported by Adam Morgan

MODIFICATIONS - 9.6.6436.18351

Line added to timesheet dashlet to display expenses waiting approval
7504 An additional line was added to the timesheet dashlet, to indicate the number of expenses waiting for approval.
-Suggested by Michelle Harris

BUILD 9.6.6453.25128

FIXES

Incorrect MinDetailID applied to jobs and Tasks

7505 Time was not appearing on screen as the MinDetailID for the timesheets wasn't a detail index, so it was excluded in the Timesheet week detail list SP.

-Reported by Adam Morgan on behalf of CSH

Arithmetic Overflow error when accessing timesheets

7554 When accessing timesheets an error message was encountered: "Arithmetic Overflow error for data type tinyint, value = -1. The statement has been terminated".

-Reported by Victoria Stephenson

Complete all button pressed will also complete a running timer

7551 If you had entries in either weekly or daily view of timesheets, all ready to complete, and also had an entry entered with a timer running, if you clicked the "complete all" button top right, all entries including the timer were set as complete.

-Reported by Victoria Stephenson

Seemingly possible to enter time for days with no header

7547 If you created headers for the start of a month ensuring the end of the previous month had no headers and both parts of the weeks fell in the same calendar week, when opening a weekly timesheet and attempting to enter time for the days with headers created, when saving you were presented with an error message. Days with no associated header were set to disabled in the UI, and the status changed to indicate that time cannot be logged for that day.

-Reported by Ellis Birt

Target hours not being brought through correctly (daily and weekly)

7545 It was found that when adding a timesheet entry in weekly or daily view, the target hours were not showing in the grid within the timesheet entry dialog.

-Reported by Victoria Stephenson

Search field in My Expenses not using dates or expense detail to filter

7488 When in expenses, if you went to any of the refiners (active, complete, approved, rejected or posted), when trying to filter the results the system was only allowing you to filter by name, which wasn't helping the user reduce the number of entries listed.

-Reported by Victoria Stephenson

Printing billing guides or exporting to excel provides an XLS file

7544 When printing billing guides, if you downloaded the report as an excel spreadsheet you were presented with a message: "The file format and extension of 'export…..xls' don't match. The file could be corrupted or unsafe. Unless you trust it's source, don't open it. Do you want to open it anyway?". This also appeared when printing from the DRS print tab in either transactions or statements.

-Reported by Victoria Stephenson

Billing guides and print grid reports not loading when exporting to excel

7533 If you accessed a client's WIP through the financials dashlet, and navigated to the print tab to print the billing guide, when clicking on the excel export button a small white box appeared, and

the report was not displayed correctly for printing. The file that was generated was .xls, but needed to be changed to produce an .xlsx file instead.
-Reported by Ben Edwards on behalf of Wilkins Kennedy

Timesheets with positive and negative entries that come back to zero weren't showing for posting
7512 If you completed an entry with positive and negative hours and your time was set to post on complete, you should have seen the "0" hours available for posting, but this was not the case. A change was made to ensure timesheets with postable entries were listed in posting even if the total is/was zero.
-Reported by Michelle Jenkins

Add ServChargeBand to services and use when adding client services
7560 You can add default charge bands to services in categories. If you engage any of these services on the client then the charge band field should already be populated with the charge band set up in categories. When adding a timesheet therefore, and using one of those newly engaged services with a default charge band, once the correct service and job was selected in the entry dialog, the rate is automatically updated.
-Suggested by Andrew Hambly

Permission for Save and Complete
7599 If the TimeScale permission was not given to a user, the ChargeBand was never set, and so the entry was never considered as valid until it was saved for the first time. This meant that to a user, it seemed that the TimeScale permission was allowing standard users to both change charge rates and save, whereas standard users were not usually permitted to change their charge rates, only have the ability to save entiries. If the user has the timescale permission, then the rate drop down will be available, if the timescale permission is withheld then the rate drop down is greyed out, preventing the rate from being changed.
-Reported by David Kelso

Documents tab in job details not available in laptop view
7552 When opening a job on a laptop, the documents tab to allow the loading of documents to a job was missing.
-Reported by Victoria Stephenson

Batching side panel to the left does not load staff count
7559 When in staff search and filtering, if you added the filtered results to a batch list by using the batch function on the staff search grid using the arrow to the right of the columns button, the list was not being updated with staff in the batches screen. (the little folder top left between the home button and MRU function). This was fixed, but it was later decided that the staff batches function be removed currently, as there is no bulk staff admin page to navigate to.
-Reported by Ryan Posener

Deleting receipt from claim not removing the warning message at the top of the claim
7579 If you had a receipt in an expense claim with no allocations on it, when trying to submit the claim, an error message would highlight both the receipt and allocation. If you deleted the receipt, the error message was still showing at the top of the claim.
-Reported by Tim Johnstone on behalf of Francis Clark

Maximum characters for log in User ID
7572 If you had a user name that was longer than 30 characters long, you were unable to gain access to the system. The limit was increased to 250 characters.

-Reported by Andrew Hambly

Timesheet Administration Manage tab causes deadlock
7597 When on the Management page win Timesheet Administration, when adding many headers a lot of refreshes were occurring in the grid causing deadlock issues in heavily loaded systems.
-Reported by Andrew Hambly

My Desk view in staff jobs
7616 The My Desk view in the staff jobs list was not showing jobs where the current staff is the only place on the job that a staff is indicated (they are not on any other part of the job). This was changed to allow the My Desk view to show all jobs where the staff is current staff on the job.
-Reported by Brad Podzius

Analysis codes not loading in large data sets
7629 When there are many analysis codes (e.g.600), not all analysis codes would load, and in some cases, no analysis codes were loaded.
-Reported by David Kelso

Timesheet Manage behaviour
7617 When accessing the timesheet administration pages and the manage tab, the current year and period were showing as expected, but when clicking the "back to summary" button, the current year and period selections were cleared, giving no summary of that particular week or the weeks in the current period.
-Reported by Victoria Stephenson

MODIFICATIONS - 9.6.6453.25128

Refiners to opportunity grids
7573 Refiners were added to the opportunity grids in the prospects system. (All, Active, On Hold, Sold, Lost)
-Suggested by Andrew Hambly

E-File Status field
7632 A field was added to the job details panel to show the job E-File status.
-Suggested by Andrew Hambly

Permissions for adding services in timesheet entry dialog screen
7598 No permission existed for the "edit" button beside the service/job field. The permission ClientServDet now controls this action.
-Reported by David Kelso

Jobs not ordered alphabetically in expense allocation
7577 When allocating in expenses the jobs and services were not being listed alphabetically.
-Reported by Tim Johnstone on behalf of Francis Clark

Check standard PELerts for timesheets statuses
5924 A check was added to check basic data alerts referencing timesheets as well as an update to standard PELerts for new timesheet structures.
-Suggested by Andrew Hambly

User parameter extended
7553 An SP handling the update of the lodgement headers had a user parameter with a length of 20, this was updated to accept 256.
-Reported by Ben Edwards

BUILD 9.6.6458.8889

FIXES

Receipt allocation not updated when correction made to over-allocation highlighted in red
7578 If you added an allocation amount that was higher than the receipt value, and you tried to submit the expense claim it fails and both the receipt and allocation are highlighted in red. If you then clicked on the allocation to amend the allocation and click save, the red highlighting was still showing on the receipt when the red highlighting on the allocation had been successfully removed.
-Reported by Tim Johnstone on behalf of Francis Clark

Group memberships not saved when creating new staff
7612 When creating a new staff member, and adding the staff's group membership on the creation page, once saved, the user's group membership had not been saved and they staff needed access to the groups applying again.
-Reported by Victoria Stephenson

Able to start a timer for Other staff users
7641 It was found that you could start a timer on other user's timesheet entries. This should not be the case. You may only add timesheet entries for another user manually, not by running a timer.
-Reported by Victoria Stephenson

Typo in create staff page
7588 The word Initials was spelt incorrectly.
-Reported by Tony Doyle on behalf of Muellor Prost

MODIFICATIONS - 9.6.6458.8889

Bulk Action wording in Security Admin changed
7646 Changes were made to the bulk actions descriptions to ensure they were easier to understand.
-Reported by Michelle Harris

Removing the ability to add allocations to a claim if no receipts are present
7619 It was found that clients were creating expense allocations before creating the receipt. The system was allowing this but the record disappeared from the screen but was present in the tables. The second part of this bug was that if a user added an allocation to a claim without a receipt present, that the allocation was being listed under the unit allocations grid as opposed to the receipts allocations grid. The following change was implemented: You may not add allocations to an expense claim without a receipt being present.
-Reported by Adam Morgan and Victoria Stephenson

Can't skip to the last page of a report

7532 It was suggested that a double arrow be added to the reports view, so that a user could skip to the last page of a report which would be quicker than typing the page number in the number field and pressing TAB on the keyboard.

-Suggested by Victoria Stephenson

BUILD 9.6.6464.27853

FIXES

Able to add approve and post expenses and disbursements for suspended clients

7498 It was found that users were able to add, approve and post expenses to a suspended client. This has been corrected, and it was ensured that if the transaction setting to lock suspended clients is ticked, then you cannot add, approve and post expenses or disbursements to a suspended client, if it is not ticked however then a warning message will appear, but the user can confirm it and carry on adding the expense or disbursement to that suspended client.

-Reported by Brad Podzius

Selected staff being lost if you leave the Other Timesheet tab and return

7633 If you had selected a staff member on the Others timesheets view and then navigated away, coming back to the selected staff, the staff member was still displayed but the staff index was being passed as 0 to the bulk activate and bulk complete calls. This meant that neither the activate or complete all functions were working correctly.

-Reported by Adam Morgan

Closed status carried over to entries when clicking the next button

7500 If you accessed a week that had been split into two different months (one month ends and the next begins in the same week), if the first part of the week is closed, and the user opened a new entry, once all details were filled in, if they clicked the next button and the dialog re-loads with the same details, it was found that the rest of the week was also marked as closed.

-Reported by David Kelso and Victoria Stephenson

MODIFICATIONS – 9.6.6464.27853

Select All/Un-Select All groups in permissions Tab Security Administration

7623 A request for a Select all and Un-Select all option for groups on the permissions tab in Security Admin was made.

-Requested by Adam Morgan

Attribute field size increased

7689 The attribute field size was increased to allow up to 250 characters.

-Reported by Brad Podzius

BUILD 9.6.6499.28045

FIXES

DRS View allocation report displayed incorrectly
7718 Accessing client DRS through the dashboard dashlet, when clicking on All and right clicking ona receipt and selecting view allocation, the report was loaded but the cheque number was doubled and overlapping.
-Reported by Victoria Stephenson

Mis-Spelling in Job templates
7778 The spelling of the word “Recurrence” was incorrect. This was corrected.
-Reported by Tony Doyle on behalf of Muellor Prost

Bulk Attribute update not working for large volumes of data
7749 When clicking on portfolio’s task pad, and bulk attributes update page, the system produced the general practice engine error. The system seemed to be timing out- this was fixed.
-Reported by Tim Johnstone and Michelle Jenkins on behalf of Withum Smith and Brown (12911)

Timer displaying Forbidden error message
7808 A forbidden error message was being displayed when using timers in Timesheets. This seemed to be due to a time out when the page was left open for long periods of time. The system will now display the login page instead of a forbidden error message to users.
-Reported by Adam Morgan

AUTODEFJOB option to create job’s automatically when service engaged on a client not working
7835 It was found that when the AUTODEFJOB setting in tblSystemOptions was engaged, that the jobs were not being created automatically in the system when a service was engaged on clients. This was fixed.
-Reported by Victoria Stephenson

Prospects Dashlet links not directing correctly
7802 From the staff dashboard, when clicking on the opportunities and Prospects links from the Prospects Dashlets, the user was being directed to the last refiner visited by the logged in user. This was fixed to ensure that when clicking upon a link from the prospects dashlet, the user is instead taken to the exact refiner matching the description of the dashlet link. (i.e. click on the opportunities link from the prospects dashlet, the user is directed to the opportunities refiner in the prospects list)
-Reported by Victoria Stephenson

New staff unable to log in until the day after start
7856 It was found that new staff members were unable to log into the system until the day after their assigned start date.
-Reported by Tony Doyle

Bulk Attribute Update page produces PE Error message
7794 When accessing the Bulk Attributes Update page from the Portfolios’ Task Pad menu, adding an attribute to the selected attributes box clicking the refresh button, then making some changes to the attributes and clicking update, the page would produce a PE error message.
-Reported by Victoria Stephenson

Question mark in ClientName

7805 In earlier versions a client could have a question mark in their ClientName. A statement pdf has the clientName included in its filename and the pdf was not being created as it didn't accept the question mark. The standard CleanFileName function was changed to remove question marks.
-Reported by Ben Edwards

Timesheet weekly printout not keeping the time to the correct weekday

7807 In timesheet weekly view, when clicking the printout button, the hours for Monday had been pushed to the Tuesday. The SP was updated to correctly return the first day of the week in the first column of data. A custom layout is needed to correct the heading to match clients' own settings.
-Reported by Brad Podzius

Weekly functionality on post on release set up

7795 When a system was set up to allow automatic timesheet posting, a posting status of complete, and the staff setting of auto post on complete enabled, when a timesheet entry was released and you opened the entry to view the details, you could add time to another day in the week using the very same details, but when you clicked save an error message appeared saying "Timesheet details cannot be saved. Some of the requested details are already POSTED".
-Reported by Brad Podzius

Job Questionnaire tick boxes not displaying content correctly

7687 When checking tick boxes in questionnaires in jobs, the tick was not being saved, and when re-visiting the questionnaire, the tick box was clear.
-Reported by Brad Podzius

Prospects search over-querying for duplicates

7648 When within Prospects and selecting Organisation, searches were occurring after the first and last name once changed. First and last name should not be searched for when setting up an organisation. The user interface was still triggering the duplicate prompt after changing the first and last name, even though the same result was produced. The duplicate search should occur after the company name has been entered.
-Reported by Ryan Posener on behalf of EKSH

Period end not updated in the Help Menu. Manual refresh needed

7717 When completing the period end, the help menu was not updated with the current period correctly. A manual refresh was needed to get the help menu to update.
-Reported by Michelle Jenkins

Rejected items in Timesheets not showing in the rejected tab

7900 in weekly view, when rejecting a timesheet from the staff approval page you could only see the rejected timesheet from the week's own view. If you went to the rejected tab to view all rejected timesheets it was not displayed.
-Reported by Michelle Harris

Approved entry not showing in approved tab- weekly view

7921 When an entry was approved in timesheet entry, when navigating to the approved tab, the entry was not displaying. It was found that in order for the entry to show you needed to select the following week, and at that point the entry was displayed.
-Reported by Victoria Stephenson

Others tab in Timesheets was displaying disabled timers
7917 When in timesheets, Others, rejected tab some entries were showing disabled timers. When viewing the detail of the entries the timer had not been used. The entries showing with a timer on them were not for the current week, so there seemed no reason for the timers to be present.
-Reported by Victoria Stephenson

Entering 8.2 in timesheet entry was incorrectly changed to 8.19 by the system
7908 In both Daily and weekly timesheet entry, when entering 8.2 and pressing TAB the system changed the data to 8.19.
-Reported by Michelle Jenkins on behalf of CBIZ (13316)

Receipts entered for other staff had logged in user's StaffIndex associated with it
7926 In expenses, others tab, and any of the refiners, you could open a claim to view then close it. On the active refiner, if you then clicked the new claim button and added a receipt to the claim from within the claim, when checking in SQL, the StaffIndex associated with that receipt was that of the logged in user. This was not the case if the receipt had been allocated outside of a claim and brought into it.
-Reported by Tim Johnstone on behalf of Wiss

ReceiptIndex only logged in tblExpenseAllocation when allocation on receipt instead of in claim
7925 Receipts entered and allocated within a claim the ReceiptIndex was not being logged in SQL. If the Receipt was created and allocated outside of a claim, then selected into a claim, a ReceiptIndex has been allocated to it.
-Reported by Tim Johnstone on behalf of Wiss

Timesheets dashlet; Removing access to Departmental Timesheets and For Approval doesn't save
7914 On the Staff dashboard, if you removed the ticks for displaying the "Departmental Timesheet" and "For Approved", and clicked the save button, the changes seemed to be made. If however you navigated away from the dashboard and back again (or logged out), the changes had not been saved.
-Reported by Victoria Stephenson on behalf of Milsted Langdon (13231)

Activate All not working in Others Tab
7702 In timesheets, Others Tab, in the complete refiner, when clicking upon "Activate All", not all completed items were changed to active, and moved from the complete refiner to the Active refiner.
-Reported by Victoria Stephenson

"New Time Entry" header when adding a document to a job's details
7891 On the documents tab within a job's details, if you clicked the Add button, the header of the add documents dialog read "New Time Entry". This has been changed to read "Add New Document".
-Reported by Brad Podzius

Editing client on allocation keeps original job of previous client
7889 In either Expenses or Disbursements, when editing a client on an allocation, it was keeping the original job from the initial client, even if the newly added client didn't have the service engaged or job active.
-Reported by Adam Morgan on behalf of CBIZ (13230)

Billing Guides error message

7812 If you navigated a Client's WIP, View All tab, clicked on a total to view details, print tab, and clicked print, an error message would occur.

-Reported by Adam Morgan

No Row at position 0 error when adding services in categories

7874 If you added recoverable or non-recoverable services on categories, the no row at position 0 error message would occur.

-Reported by David Kelso

Blank Status search in Client Search not returning results

7873 In timesheet entry, when adding a new entry, if you clicked the grey search button beside the search field, ensuring the "status" drop down was blank, if you then clicked search no results were showing. In previous versions, all clients were returned.

-Reported by Ben Edwards

Clicking submit produced error message

7947 It was found when within expense claims, that if you tried to submit an active claim by clicking the submit button, the following error message was produced, even though the system seemed to carry out the request successfully otherwise: "You cannot save a claim which is not active"

-Reported by Victoria Stephenson

The order set in reports admin to list your reports was not being saved and applied

7944 The order you can set on the report details within report admin, was not having an effect on the display order of the reports. If you opened up a reports details in reports admin, General tab, there is a field that says Order, and when saved, the order you placed on the report was not being mirrored in the reporting list.

-Reported by Michelle Harris

Reports showing for users that don't have permissions to them

7945 When removing all groups permissions to reports it was found that all users were still able to access it in the staff reports list. Only the groups added to the selected box within the Groups tab in the reports details, should be able to view and run the report.

-Reported by Michelle Jenkins on behalf of Edwards and keeping (13375)

Non- partners listed in partner field in Prospect opportunities page

7948 In the prospects area, when opening up a prospect to view, on the opportunities tab, there is a field called partners. All staff were being listed here, not just those graded as partner. This was corrected.

-Reported by Brad Podzius

Adding New "From Last" and saving a timer produces error

7955 When in timesheets, and adding timesheet entries, if you had successfully added an entry, then clicked the arrow beside the New button and selected From Last, when the timer was set and the save button clicked the following error message was produced: "The cast value type 'System.Int.32' failed because the materialised value is null. Either the result type's generic parameter must use a nullable type".

-Reported by Victoria Stephenson

Add Receipts in Disbursements provides an error message

7961 When clicking on the “Add Receipts” button within a claim an error message was produced: “This request is invalid”.

-Reported by Victoria Stephenson

MODIFICATIONS – 9.6.6499.28045

Internal Jobs created from non-chargeable services

7694 Job Templates were enabled for use with internal clients.

-Reported by Tim Johnstone

Incorrect labelling in Calendar view in Timesheet entry

7833 Clicking on the calendar in timesheet entry would display complete weeks in green, and when hovering a cursor over the week itself it would say “complete”. When clicking on any of those weeks to view them, not all had the status of complete-some instead showed as Approved or Posted. To combat the misunderstanding of statuses in the calendar view, the caption was changed to say “Target met” when hovered over green weeks, and “Target met and Closed” when hovering the cursor over grey weeks with lines through the numbers, as the “complete” caption used *previously* didn’t actually refer to the status of the timesheet itself, and was creating confusion.

-Reported by Victoria Stephenson

Change the layout to calculate weekly daily column titles

7893 In timesheet entry, when clicking the timesheet print button, Monday’s hours had been pushed to Tuesday in the report printout. The layout was changed to calculate the daily column titles automatically.

-Reported by Victoria Stephenson

Order of the “Allocate To” drop down in Unit Based Expenses Dialog

7912 The order of the drop down in unit expenses dialog box for “allocate to” was changed to use an SP rather than LINQ to allow user defined sorting.

-Reported by Tim Johnstone on behalf of Francis Clark

Delete Template and Back to Templates buttons in Jobs view

7722 The delete template button in templates set up in admin, when clicked, was not producing a check message, to ensure that templates were not accidentally deleted.

-Reported by Adam Morgan

BUILD 9.6.6509.22386

FIXES

Exporting Reported data from client staff or contact reports not working

8004 If you opened Reports from the client menu and clicked the export icon on the right of the reports description on any report, it failed as the client wasn’t passed to the report.

-Reported by Tim Johnstone. Also, Adam Morgan on behalf of CBIZ

Engaging services on timesheet entry

7958 When engaging a service whilst adding a new timesheet entry, if the partner, manager and client in charge fields were kept blank, and the engage button clicked although it seemed to engage the service on the client, on returning to the service and job editor dialog, the engage button was

still showing as active for the service. When clicking the engage button a second time, an error message was produced.
-Reported by Tony Doyle

WIP Balanced Journal
8009 If you added the adjustment amount to the adjustment field in the WIP Balance Journal field leaving the cursor in the field and pressed enter instead of the Tab button on your keyboard, the system added a positive record onto the client and a negative record onto ContIndex which doesn't exist. This caused issues in WIP.
-Reported by Tony Doyle on behalf of Wilkins Kennedy (13656)

BUILD 9.6.6536.22565

FIXES

Service marked as InActive displaying in job templates in Assurance
7998 When templates were unticked in job templates definition page in admin, the template was still being displayed in assurance set up for a user to select and use on a new client.
-Reported by Edwin Gomez on behalf of PMCH

Mobile Timesheet date issues
8053 Mobile timesheets were posting to the following day.
-Reported by Ryan Posener

Abandoning expense claims
7971 Only the header was being removed when abandoning an expense claim. When deleting receipts and allocations from a claim, unlike in disbursements, there was no check message to ask if you wanted to keep or delete the receipts before abandoning the claim. It showed on the client as unposted WIP, but if you go into a fee and select "Add Unposted WIP" it displayed the expenses, but when selecting them the system did not bring the transactions into the fee but set the record in tblExpenseAllocation table as Posted, but the record itself isn't in WIP. You could bring the receipt and allocation in from an abandoned claim and the entry was posted, but it should then show as a WIP transaction in tbleExpenseAllocation but it wasn't.
-Reported by Tony Doyle on behalf of CBIZ

Errors in the event log relating to PDF viewer page
8073 When printing a draft fee, there was an event log error added for a null reference exception.
-Reported by Tim Johnstone

Suggestions displayed greyed out fields when added
7959 When opening up the suggestions panel in timesheet entry and dragging an entry to the timesheets grid, you were unable to choose an analysis and no rates were loaded to the page. You could only edit those details if you re-opened it from the grid view, once the entry was saved.
-Reported by Victoria Stephenson

Job_ID column in Global Job admin displayed error message when sort applied to grid
8066 If you had Job_ID column selected in the standard global jobs grid, and performed a sort on the grid you got an error message: "Ambiguous column name 'Job_Idx'". If you had the Job_Id column already selected on the grid, added a sort to another column (like client name), you got no error message, but if you then clicked on the Job_Id column to sort by, then the error message was presented.

-Reported by Michelle Jenkins on behalf of Francis Clark (13521)

Grid not updating after allocation deleted from receipt and receipt then removed from expense
8076 Within a claim, a receipt with allocations on it, if the allocations were deleted and the receipt removed from the claim so that it was blank, on closing the blank claim the grid still showed the original total allocation amount for the claim.
-Reported by Victoria Stephenson

Cannot create Client Monies Account from the dashboard
8065 From the client dashboard when clicking on the create new account button from the client monies dashlet, once you filled in the form and submitted it, a PE error message was displayed.
-Reported by Michelle Jenkins

Sending emails with multiple attachments had the incorrect file names
8164 Bulk printing several invoices to the same email address should show 1 email with multiple attachments, but all the attachments had the same file name with _1, _2, _3 on the end rather than the correct file name for the attachment.
-Reported by Andrew Hambly

Add All button in posting screen of expense adding a blank totals line
8089 From my expenses, on the posting tab if you clicked the add all button from the claim selection refiner, then clicked on the posting tab, a blank line with a totals amount was displayed along with the timesheets to be posted.
-Reported by Tim Johnstone

Date field too large in expense allocation, reducing the VAT rate field size
8075 The date field was larger than it needed to be, which then reduced the space allowed for the VAT rate field, which wasn't showing the VAT rate effectively.
-Reported by Victoria Stephenson

Logo showing through menus
7834 When using some menus along the top of the screen, the menus were showing the logo and background behind it.
-Reported by Victoria Stephenson

Problems when passing multiple credit notes against the same fee
8095 When crediting a fee and writing back the WIP, unallocated the credit note from the fee then create a new linked credit note against the fee and write back the WIP, the WIP figure was doubled. An error message will now be presented to prevent the user from unallocating a credit note if it had previously restored the WIP.
-Reported by Tony Doyle

Daily timesheet entry "New from last" adding entry to previous day not current day
8090 From timesheets daily view, when adding an entry, if you saved the entry, moved forward one day and selected New from last, and saved the entry, the entry was added to the previous day not the current day.
-Reported by Tim Johnstone

Active Reports Image Errors
7751 An outage of memory was being experienced. Calls to export a report page to Tiff image found that not all images were appearing on reports. Not enough memory in the system could be

allocated to the bitmap. To combat this issue which has been logged with Microsoft Azure, PE has made a change from images to PDF preview in 9.6.1 and above. This is still a problem in 9.6 but should be fixed in versions 9.6.1 and above.
-Reported by Ryan Posener

MODIFICATIONS – 9.6.6536.22565

Expense Allocations on receipts need to be able to have different dates than the receipt itself
8032 Needed to add date to allocations linked to receipts, both in the receipt allocation and the claim allocation view.
-Reported by Tim Johnstone

ShortCode increased on tblEngagement from 20 characters to 50
7723 ClientCode was changed to be increased from 20 characters to 50 characters, just like tblContacts.
-Reported by Michelle Jenkins on behalf of WSB

Add Job Code to new job from template view
8098 It was suggested that the job code be included on the create new job from a template page. It calculates the code with the same placeholder replacement as the job name and if no code is provided then the default code should be generated as before.
-Suggested by Andrew Hambly on behalf of Warren Averett

Automatically select the timesheet analysis code if there is only one available
8139 It was suggested that in Timesheet entry the analysis code should be selected automatically if there is only one available.
-Suggested by Andrew Hambly on behalf of Warren Averett (14120)

Add a week total column to weekly timesheet grids
8138 It was suggested that a week total column be added to weekly timesheet grids.
-Suggested by Andrew Hambly on behalf of Warren Averett (14122)

Add client code to Timesheet approval page
8137 It was suggested that the client code be added to the timesheet approval page.
-Suggested by Andrew Hambly on behalf of Warren Averett (14123)

Add Analysis code to Timesheet Approval details list
8136 It was suggested that the analysis code be added to the timesheet approval details list.
-Suggested by Andrew Hambly on behalf of Warren Averett (14126)

Check message when completing timesheets
8176 It was suggested that a check message be displayed to inform the user that not all entries were marked as complete if active entries are present in the list that still need more information adding.
-Suggested by Tim Johnstone on behalf of Francis Clark (14082)

Change Report Viewer to PDF
8048 A change was made in the Report Preview to drop images for preview, and only load PDF. ***The IE browser no longer supports the reports preview***, and users instead need to click to download the report before viewing, either using the actions menu to the right, or the blue “here” link in the

red information message presented on screen. ***User's can still run reports in IE, but the browser itself does not support the preview of PDF documents.***
-Ryan Posener and Andrew Hambly

BUILD 9.6.6544.35030

FIXES

Client WIP and DRS reports showing missed date formats
7957 When running billing guides and some reports from the reports view menu, a mixture of US and UK dates were being displayed.
-Reported by Victoria Stephenson

Timesheet Others permissions changes for Office, Department and Global
8162 There were differences in the way that permissions were working from version 8-9 for Office, Department and Global. If users are in either a different Office or department to you, you should not be able to see their timesheets.
-Reported by Michelle Harris and Tim Johnstone on behalf of Francis Clark

Speed up the refresh of colours in the timesheet calendar
7832 When completing a timesheet in timesheet entry, the calendar was not refreshing in a timely manner, to indicate the new change. Changes were made to improve the speed at which the calendar updates.
-Reported by Michelle Harris

Forbidden error messages
8097 It was reported that Forbidden error messages were being produced in several places in the system. Changes were made to deal with this, and a prompt to ask the user to log in after credentials expire.
-Reported by Andrew Hambly

Unable to start a timer on an active entry in weekly view
7923 In timesheet entry and daily view, when clicking complete all, entries were correctly marked as complete. When however, changing the view from daily to weekly, an entry was still active and the user unable to start a timer on it. This seemed to be a grid sizing issue.
-Reported by Victoria Stephenson

Allocating remainder of a receipt within an expense or disbursement
7960 If an invoice was created and partial allocations were added to it, then saved, when bringing the receipt and its allocations into a batch, it was found that the system didn't handle the remainder of the outstanding amounts and VAT totals and would instead over-allocate. It was found that an aggregate was not aggregating all values, and instead ended with only the last value of the VAT.
-Reported by Victoria Stephenson

Jobs expired session error when moving from documents to billing tab
8191 When clicking on the documents tab within a job, opening and downloading a document, then closing it, if you then clicked on another tab the following error message would be produced: "Your credentials have expired and must be re-verified"
-Reported by Victoria Stephenson

Restricted Reports Permissions not working correctly
8085 When limiting permissions to the Admin area of the reports menu, it was found that the permissions were not being honoured.
-Reported by Ben Edwards on behalf of Meridian

MODIFICATIONS – 9.6.6544.35030

Add Postable column to Timesheet Posting page
8175 It was suggested that both an Actual column and a Postable column be added to the Timesheet selection tab within Timesheet Administration.
-Suggested by Tim Johnstone and Andrew Hambly on behalf of Francis Clark (14026)

Activate button in Timesheet Approval changed to be "Unapprove"
8167 When activating a timesheet from the Staff Approvals page, when clicking the Activate button to send it back to the user, the status of the timesheet entry was Complete. It was felt that this is confusing to users who might expect the status of the timesheet to be "Active", and the Button was changed to be "Unapprove" so that users wouldn't expect that the timesheet should have a status of Activate instead of Complete.
-Suggested by Vicky Stephenson and Andrew hambly

Additional refiner on my timesheets to show Incomplete weeks
8171 The Calendar picker displaying incomplete weeks was causing a lot of confusion for users when not refreshing quickly enough. An additional "incomplete weeks" refiner was added to combat this.
-Suggested by Michelle Harris

Security Admin Page- "All" or "None" option for Group checkboxes
8168 "Clear All" and "Select All" checkboxes were added to the top of the security Admin page where a list of all the groups are displayed. It makes it far easier to select just one group out of many.
-Suggested by Michelle Harris

BUILD 9.6.6564.37302

FIXES

Release All settings set in Admin, but Release All option setting entries to Complete
8270 When all settings were set up for Release on complete in daily view, on clicking release all, the entries were set to complete.
-Reported by Michelle Jenkins on behalf of PMCH

Able to search for and add time for a locked client from the client actions dashlet
8301 Users were able to search for locked clients in both the client field name and client code. Clicking on the client from this search screen gave you access to the locked client's dashboard, and once there by using the client actions dashlet, you could click on "enter a timesheet" and a timesheet entry was created with the timer running.
-Reported by Michelle Jenkins on behalf of Larking Gowen (14372)

Special Portfolios horizontal scrolling bar not working
8187 If the special portfolios screen had many columns added to it, it was found that although the vertical scroll bar was working correctly, the horizontal scroll bar was not, which prevented the user from being able to access the information in those extra columns.
-Reported by Tony Doyle on behalf of Francis Clark (14179)

Problem adding new users
8311 For US clients, the system was not allowing the creation of new "Full users" if all the intern licences had been used up.
-Reported by Tony Doyle on behalf of Muellor Prost (14421)

Duration units based on Time Zone
8317 When calling the pes_Timesheet_Timer_Start, the Duration Units were -6.99 hours when set up in Denver. A fix was applied to combat this issue.
-Reported by Ryan Posener

BUILD 9.6.(1)6598.18234

FIXES

Duplicate person function not finding all matches
8297 Existing contact names were not being found and matched in the duplicate check.
-Reported by Michelle Jenkins

Nothing shown on the Jurisdiction tab in Job details
8238 when trying to access the Job Jurisdiction page within a jobs details, the page was blank.
-Reported by Victoria Stephenson

Indexed DB not always completing test in Edge browser
8295 In Microsoft Edge the new browser test applied by PE sometimes works too fast, and the browser cannot keep up. This keeps the browser in a hung state whilst it waits for the IndexedDB Open or Add method to complete, but it has already been completed.
-Reported by Ryan Posener

Active Timesheets list containing invalid weeks
8286 The new drop down of inactive weeks on the weekly timesheets view was displaying weeks that were invalid, and were crossed out on the calendar.
-Reported by Andrew Hambly

Forwarding Jobs to terminated Staff
8316 It was found that you could forward a job to a member of terminated staff.
-Reported by Brad Podzius

Clicking Complete in daily view didn't present a check message as in weekly view
8227 If clicking complete all in daily timesheet entry and a number of the entries were marked as either complete, approved or posted, there was no check message produced telling the user that not all items in the grid were marked as complete.
-Reported by Victoria Stephenson

Portfolio Dashlet SP changes
8199 A change was made to the logic of the SP that ran for the Portfolio Dashlet.

-Reported by Tim Johnstone

No Tasks shown when transferring WIP within a bill
8281 From within a draft fee on the WIP tab, when choosing either transfer WIP In or Out, once you got to the point of selecting the client/service/job/task to transfer to the task, the list wasn't populated once you changed the service or job.
-Reported by David Kelso

IE Reports message change
8269 When running a report in IE, the information message was incorrect. A change was made to the message to correct this.
-Reported by Victoria Stephenson

Unable to create a draft fee
8300 When clicking on New draft from the financials dashlet, and clicking Next, a Practice Engine Error was produced. This was due to a problem with dates, and was corrected.
-Reported by Victoria Stephenson

Blank Timesheet entry form
8264 When in timesheet entry in both weekly and daily view and adding a new entry, the new entry dialog was blank with only field descriptions, but no description fields to hold information.
-Reported by Victoria Stephenson

No Column detail in the Posting page in Timesheet selection for posting
8228 In the Timesheet Admin pages, in the Posting tab and the Timesheet Selection Tab, when clicking on a line entry to view the details, no details were displayed to give a title/header to the information being shown.
-Reported by Victoria Stephenson

Posted claims still showing on the Claim selection page in Expenses and Disbursements
8172 Any expense that had been selected from the Claim Selection page, and successfully posted, were not immediately removed from the claim selection page, so it seemed the posting had not taken place. When navigating away from the page/area and back again, the claim selection list was updated and the claims removed.
-Reported by Victoria Stephenson

No save button when re-ordering tasks nor when adding Tasks within Jobs
8234 User could make changes to existing Tasks, by opening the edit Task dialog and clicking save within the dialog and could also change the order of the tasks using the drag and drop, **but** the changes made using the drag and drop were not saved as no save button was displayed. User could add a Task to the Tasks tab/page, **but** no save button would be displayed, so couldn't save the changes made.
-Reported by Victoria Stephenson

No schedule button available in Management Tab within the Jobs Details and Panel view
8236 When opening a job to view the details user could not see the schedule button to begin scheduling with the job. User can now access the Job Schedule button only from the management tab in both panel view and job details view.
-Reported by Victoria Stephenson

ClientJobDets permission giving access to the document tab

8237 When the following permissions were added: ClientJobs ClientJobDets, and User accessed the Jobs details, all tabs were read only but user was able to open documents to read and delete the documents without issue. The documents tab is now greyed out, but a user can download and view the document from the JobDocuments tab if they have the ClientJobs and ClientJobDets permissions.

-Reported by Victoria Stephenson

JobQuest permission gave no access to Questionnaires Tab

8243 When the permissions ClientJobs, ClientJobDets and JobQuest were added, although a user could view the questionnaires tab, they could neither open the questionnaire to view or add a questionnaire to the job.

-Reported by Victoria Stephenson

Add Staff field covered Primary Staff field in Job Roles page in Job details and unable to save roles

8232 In the panel view in the Jobs grid on a client with the following permissions added (ClientJobs, ClientJobDets, JobRoles) the add staff column was covering the primary staff added to the job. If a User searched for and added a staff member on a role, there was no save button to allow the changes to be saved to the job.

-Reported by Victoria Stephenson

Unable to choose a role from the drop down in Job Roles Tab

8233 With the following permissions (ClientJobs, ClientJobDets, JobRoles) you could access the Job Roles tab within a job, and could add and save changes made, but you could not choose a role from the roles drop down before clicking the Add button.

-Reported by Victoria Stephenson

Active Save changes button

8241 The following permissions (ClientJobs, ClientJobDets, JobChangeBudgetType) denied users access to the Job Budgets tab for editing when ticked in system admin. It instead displayed greyed out fields and active Save Changes and Cancel buttons. (Grid panel greyed out)

-Reported by Victoria Stephenson

Unable to save changes made to Notes in History on a Job

8242 It was found that a user could add a note to the history tab with the following permissions (ClientJobs, ClientJobDets, JobNotes). However, although you could click to edit a note, you couldn’t save the changes you made.

-Reported by Victoria Stephenson

Allocating the remainder of a receipt within an expense or disbursement

7960 If a user created an invoice and partially allocated it outside a Batch/Claim, saved it, then created a batch/Claim and added that receipt to it. The user tried to add another allocation to make up the downfall, but the system didn’t auto-allocate the amounts correctly.

-Reported by Victoria Stephenson

Jobs expired session error when moving from documents to billing tabs

8191 If a user clicked on the documents tab, and clicked to open, download and view the document, then closed it, and navigated to the billing tab, the following error was presented: “Your Credentials have expired and must be re-verified”. User clicked “Verify” and the page was refreshed, and the user was taken to the details page.

-Reported by Victoria Stephenson

Client WIP and DRS reports mixed date formats
7957 When running a billing guide for a client, a mix of UK and US dates were displayed on the reports. (Client dashboard > Financials Dashlet > WIP figure > Print tab, Print).
DACPAC Parameter - note for build doc:
A new "PE Data Upgrade" tool has been issued. You must use the new tool (included with the build) in order to successfully apply all future dacpacs. Using tools prior to the one will not include parameters now necessary.
-Reported by Victoria Stephenson

Import in Classic unable to handle large Imports
7724 Large files (e.g. 60KB CSV files) fail when using the Classic ImportControl page when the site is configured with Redis backing the session Store. The Import was storing the entire data load into a single variable in session, which is too large for Redis to allow in PaaS. A Change to the Import Control to use a tempfile instead of session storage so that the import can succeed no matter the size was made.
-Reported by Ryan Posener

Fix how pes_Job_Create_From_Template calls pes_Client_Service_Add
8249 The SP pes_Job_Create_From_Template wasn't passing the correct parameters through to the service SP pes_client_service_add. It was missing the partner, manager, in-charge and department as they all defaulted to null.
-Reported by Adam Morgan

Time recorded to Incorrect day in Mobile view
8204 The mobile view was not recording time to the correct day.
-Reported by Ryan Posener

Pes_Timesheet_Timer_Start records DurationUnits based on TimeZone
8317 When calling pes_Timesheet_Timer_Start the DurationUnits were -6.99 hours when sitting in Denver. That day at 12:00, the data going into the SP was as of 2017-12-12 19:00:00 +00:00:00, which was correct, but 7 hours ahead. So, comparing to getDate() didn't work on User's machine, running in -07:00 hours. It was presumed getutcdate() would fix it, but it did not resolve it in testing either. Need to use SYSUTCDATETIME() going forward.
-Reported by Ryan Posener

Build Fee by Staff default to £ rather than system currency
8343 A change was made to update the currency symbol on the fee narrative.
-Reported by Michelle Jenkins

Timesheet Approval listing incorrect staff for departmental approval
8341 It was found in Timesheet Approval, that the system was listing the incorrect staff for the departmental approval.
-Reported by Michelle Jenkins

Timesheet header view list of hours doesn't match list of dates
8319 If you have a system set up to run Sunday to Monday for timesheets and your work profiles are correctly set to start on a Sunday then the displayed dates and hours in the timesheet header dialog accessed from the management tab of timesheet administration don't match up. The dates correctly list Sunday to Saturday but the hours are showing against Tuesday to Saturday rather than Monday to Friday.
-Reported by Ryan Posener

Cannot re-edit the description of a document once already uploaded
8307 When in jobs and adding documents, if a user had added a document to a job, then gone back in and edited the description on the item and tried to save their changes, they got the following: "Value cannot be null.\r\nParameter name: entity". If you clicked cancel on the error message, then the document was lost.
-Reported by Victoria Stephenson

Zero Bill Reversals
8342 Zero Bill reversals weren't getting the correct Period ID.
-Reported by Ben Edwards

Assurance Job Templates list
8340 Assurance was listing inactive Job templates for Users to select when creating jobs on an assurance request.
-Reported by Tim Johnstone

No Save button when adding Job Budgets
8240 The following permissions (ClientJobs, ClientJobDets, JobBudgets) allowed Users to access the Job Budgets tab, where they could edit the details and add a row but there was no button to save the changes made.
-Reported by Victoria Stephenson

Client Details Dashlet not saving changes in display when set
8371 When on the client details dashlet on a client's dashboard, you could click the page button top right on the dashlet header and select more options to add to the dashlet's main page view, but on clicking save, although the extra fields had been added to the dashlet, if the user navigated away from the dashboard and back again, the changes were lost.
-Reported by Victor Timotin on behalf of Foxley Kingham and GKP (14575)

Change weekly grid SP
8445 A change was made to the weekly grid SP to highlight rows involved in days over 24 hours.
-Reported by Andrew Hambly

Timers can take number of hours recorded in a day over 24
8431 It was found that timers could take the hours logged for a single day over 24 hours. It should not be possible to record more than 24 hours for a day.
-Reported by Victoria Stephenson

Strange field display when creating new jobs templates
8368 When adding a new Job Template in Admin> Job Templates Definition, when adding Roles, the display was squashed to the left, whilst in the Tasks Tab when adding tasks, the task name/subject was listed under the Tasks' Due date, with no field to update the due date on the Task. When clicking edit to add a due date, the due date was then displayed under the Budget Header, unlike the same pages in previous versions.
-Reported by Victoria Stephenson

Timesheets; Weekly view- Saving timer adds duplicate entry
8415 When adding a new timesheet entry, starting a timer and clicking save, then entry was supplicated. They were exact copies of the original.
-Reported by Victoria Stephenson

Date fields in posting tab of my expense not working
8366 When using IE, Users couldn't change the date in the posting tab of my expenses. The date ranges to the right of the screen were not providing a calendar to the user in order to choose a date range.
-Reported by Victoria Stephenson

Timesheets; Jobs view- Can delete a complete entry
8157 In jobs view in timesheets, users were able to delete an entry that had been marked as complete. There also seemed to be no way of activating the entry from within- you could only use the actions menu. If I went to another view (Like weekly or Daily) The user had to activate an entry before being able to delete it when its status was complete and the activate option was available in the actions menu and within the entry itself.
-Reported by Victoria Stephenson

Timesheets; Jobs view- Timer
8160 When in Jobs view, if you added a new entry and started a timer, once it was started and running and you clicked on the entry on the grid to close it up and change the view to weekly view using the drop down top right, around 40/50 seconds were being added to the timer's time.
-Reported by Victoria Stephenson

Timesheets; timer adding time to a job timesheet entry
8156 Started a timer on an entry in Jobs view, then stopped the timer and clicked save. If you then opened the entry and started the timer again, the timer started at 15 minutes. If you stopped, saved, then started it again, the time on the timer would be increased to 30 minutes.
-Reported by Victoria Stephenson

Timesheets; Clicking complete on an entry with a running timer produced an error message
8159 In Jobs view in timesheets, with half an hours' time entered in one field, then a timer started below it, there seemed to be no save button available. There was a complete button available, so the user would click Complete, but be presented with an error message, with the timer still counting in the background. If the timer was stopped and the details saved, then the entry could be completed without error.
-Reported by Victoria Stephenson.

Cannot print statements in IE browser
8487 It was found when in the client DRS pages accessed from the client's financials dashlet, if the user went to the Print tab and clicked the Statement Print button, an error message was produced and no way to view or save and download the report was available.
-Reported by Michelle Harris

Timesheet Auto-Build weeks SP Change
8441 Auto created timesheet headers were being created with a status of POSTED. There was a bit of code which should mark the headers as posted when the MinHours was 0, but it was doing it when the TargetHours were 0, which was incorrect.
-Reported by Ben Edwards

Adding lots of Group client to a bill times out
8472 When in a draft fee and on the WIP tab, if you selected to add group clients to the fee, if there were lots of them, it was taking a long time. A change has been made to speed this process up.
-Reported by Tim Johnstone

Forgot Password does not queue Azure storage message to the "Send Email" queue

8455 In Azure deployments, when clicking on the Forgotten password link in the log in page, no email message was being sent to the user in order for them to change their password to access PE.

-Reported by Ryan Posener

JobTmp_Name still being used in CS and TS

8365 If a change was made to the Template Job Name or Job code in the tblJob_Template_Header in SQL, then the name and code would reflect the change in the job templates definition page in Admin. The only table that should affect the Templates name and code would be in TblJob_Header.

-Reported by Tim Johnstone

Disbursement Import produces Error message

8498 When doing a Disbursement Import, when clicking the second Import button at the bottom of the page after successfully uploading a CSV to the page, the following error message was displayed and the Import failed: "Import Failed: All rows must have a valid date", even if the dates in the import spreadsheet were valid.

-Reported by Victoria Stephenson

Discrepancy in definition of 'today' for weekly Timesheet grid

8458 In a timezone where the User Interface is different to the database server date, when saving a timer and refreshing the page, the day previous had been updated.

-Reported by Ellis Birt

Assurance questionnaires only showing one question

8506 It was discovered that combination questions weren't showing correctly, and was instead only showing the 1 question regardless of the number of questions that actually existed for it. The type of question had no bearing on whether or not the questionnaire displayed more than one question.

-Reported by Michelle Harris

MODIFICATIONS – 9.6.(1)6598.18234

Jurisdictions not to be added if some exist

8312 When the database is upgraded or updated, it was requested that no new records be added to the tax return jurisdictions tables if some already exist.

-Suggested by Brad Podzius

Jobs Permissions- enforce permissions to control user's ability to update the job panel

8037 Changes were made to try and control the updating of jobs. If you aren't meant to see the job details, you shouldn't have the Job Details permission. If you do have the Job Details permission you can access the jobs permissions, though each tab will have its own permissions to allow editing.

-Suggested by Andrew Hambly

No Job Documents permission

8239 There seemed to be no permission for the Job Documents Tab. This permission was added, and users are able to open the job to view the details of the documents on the job.

-Reported by Victoria Stephenson

JobTmp_Name being using in some places when it should be Job_Name

8337 The list of Job Templates was being listed by the Name on the old job template table rather than the Name on the job table, so the order looked a bit odd.

-Reported by Tim Johnstone

Re-work notes area in Jobs
8336 Changes were made to the notes area in Jobs. All available controls (allow note text, complete tick box, permanent tick box) can be set when creating and updated when editing a note. The shared notes option has been removed but the permanent tick box can be ticked, and when the job is Rolled that note is added to the newly Rolled job.
-Suggested by Victoria Stephenson

Stop giving "not all entries…" message when bulk releasing if some entries are "Posted"
8446 It was decided that the information message to inform the user of entries not being included in a bulk action within timesheets, should not be displayed when those entries are Posted.
-Suggested by Andrew Hambly

Change Bulk Release
8444 Changes were made to return an error message and do nothing is any day on the timesheet has more than 24 hours recorded.
-Suggested by Andrew Hambly

Limit available weeks in timesheet by StaffTimeStart (tblstaff)
8411 In timesheets, all incomplete weeks from the start of PE time were being listed in Weekly view of Timesheets. This was changed to limit to weeks after StaffTimeStart.
-Suggested by Andrew Hambly

Add Ability to create Assurance Request in API Calls
8468 It was found that the API system didn't include the ability to create a new assurance request- this functionality has now been added.
-Reported by Ryan Posener

BUILD 9.6.(1)6606.26478

FIXES

Timesheet links
8523 When clicking some links, the URL's seemed to route to PE/Timesheet, which on occasion failed to load. /PE/Timesheet/Dashboard always loads, so a change was made to ensure that was the URL that pages and links were using.
-Reported by David Kelso

Running Attribute reports from the client attributes screen
8450 The report was still referencing a column that no longer exists, that was removed when all images were inserted into the tblBlobStorage table. The attribute report from the client attributes screen wasn't printing at this point.
-Reported by Ben Edwards

Clients WIP going out of balance
8652 The problem seems to have been how the WIP transfer was getting the list of WIP entries to be updated with a zero outstanding amount when it created the new entries to move a transaction to a new home. If a transfer was done at the same time as timesheets were being posted it was possible to have some of the new timesheets created with a zero outstanding amount.
-Reported by Andrew Hambly

Currency symbols were the wrong way around when looking at a multi-currency client (DRS Page)
8613 The client DRS page for multi-currency clients was displaying the incorrect currency when the tick box was ticked. Unticked should be the client currency and ticked would be the base currency.
-Reported by Michelle Harris and Paul Chipperfield

Data and Filtered Data option not working when at lowest WIP level from Client WIP transactions
8519 Clicking on the WIP figure from the client's dashboard and drilling down to the lowest level, if using either the Data or Filtered Data option, neither were producing a CSV file.
-Reported by Michelle Harris

Unposted column missing as default for WIP Trans pages on a client
8501 There was a difference in the columns in the WIP transactions pages on a client between the last version and the newest after the classic pages were updated to version 9 pages.
-Reported by Michelle Harris

Accessing WIP from Client Financial dashlet goes to My Services
8474 Clicking on the WIP figure from the client's financial dashlet on their dashboard to access the WIP transactions pages seemed to be taking the user to the first tab, My services, not All Jobs. This was changed to be All Jobs each time when accessing the WIP transactions page from the dashboard. When accessing the same pages from elsewhere in the system, sticky tabs will remember the page you were on when last you visited.
-Reported by Michelle Harris

Cannot remove last service allocation from a Job Template
8364 From the Job Template Definitions page in Admin, if you copied an existing template that was allocated to more than one service, then unchecked each service in turn against the copied template, when the last tick box was unchecked an error message was produced: "Sequence Contains No Elements" (500 error from server).
-Reported by Tim Johnstone

Bulk client admin job updates not engaging the service on clients who do not have it
8428 When in Bulk Client Admin trying to add a job to a batch of clients, if the clients didn't have the service engaged then the following occurred: (Even when the "engage service" tick box is ticked): "The formal parameter "@Partner" was not declared as an OUTPUT parameter, but the actual parameter passed in requested output. Cannot insert the value NULL into column 'Job_Idx'
-Reported by Brad Podzius

Job approval throwing an error when trying to approve entries
8502 From Job approval in My Timesheets, when selecting a job from the list of jobs requiring approval and clicking onto the approve button next to an individual line, the following error was thrown: "The connection is already in a transaction and cannot participate in another transaction. EntityClient does not support parallel Transactions".
-Reported by Michelle Harris

DRS Transactions grid - default sort order should be based on most recent date
8507 On the client DRS transactions pages the date column on All and Outstanding Tabs should default to most recent first, but were not. This was fixed.
-Reported by Paul Chipperfield and Michelle Harris

"x" icon in date picker producing error message In Chrome browser
8463 Using Chrome Browsers- When clicking on the “x” in the date field in global standard job management and tax job management pages, in order to blank the date and type in a date of your choosing, an error message was produced: “SqlDateTime Overflow. Must be between 1/1/1753 12:00:00 AM and 12/31/9999 11:59:59 PM”.
-Reported by Tim Johnstone

Import Feature/ Staff charge rates import adds an extra line to import and it won't complete
8500 From Import control, if you selected the import type of Staff Charge Rates, when loading the file, a blank line was added to the top of the grid. User then clicked the confirmation message and clicked validate, again confirming the information message and it failed stating: “Procedure or function ‘pes_Import_Staff_Change_Rates_Validate’ expects parameter ‘@Staff’, which was not supplied”. This issue was affecting any import that used dates.
-Reported by Victoria Stephenson

Right clicking and editing an invoice or RFP
8370 On a client’s DRS transactions, if you right clicked on an invoice or RFP and selected edit and chose a layout, the layouts displayed weren’t valid for any organisation. This was fixed and a restriction by Transaction type was also added.
-Reported by James Arthur

Password Email sent to staff email not staffuser
8628 In Password control, unconfirmed tab when clicking send email, in some cases this was failing if an email address was not used for the StaffUser, because the SP that runs was passing StaffEmail for the user, not StaffUser.
-Reported by Tim Johnstone

Error message when selecting to email fee from DRS Transactions action menu and client has no Credit Contact Email Address
8520 From the client’s DRS transactions, if you selected email from the action menu next to an invoice an error message was produced: Object not set to an instance of a reference.
-Reported by Michelle Harris

Collection Notes behaviour doesn't show the notes once saved, only when opened up
8504 When in DRS Trans on a client, on the Print tab in the collection instructions area and you opened the notes window, when adding a note and saving it, if you navigated away from the page and back again the note was not showing on the page.
-Reported by Victoria Stephenson

MODIFICATIONS – 9.6.(1)6606.26478

PEDataUpgrade Utility does not update script when Language and Country are modified.
8655 When using the PEDataUpgrader, changing the Country or Language dropdowns did not update the script command (shown in the bottom part).
-Reported by Ben Edwards

Update Disbursement Import to set default dates on allocations based on Receipt date
8510 When doing a Disbursement Import, the dates were only showing on the receipt and not the allocation. When the allocation was opened to view the details the date field was empty. A change was made to set default dates on the allocations based on their receipt.
-Reported by Michelle Harris

Show all checkbox in Client WIP Transactions page

8503 The show all entries tick box in the WIP transactions pages on a client had a white border around it. This white border was removed.

-Reported by Michelle Harris

Forwarding client Job to No staff allocated or Unallocated

8348 The function of forwarding jobs was modified to allow forwarding of jobs to unallocated staff if users had set up a role with the unallocated user assigned to it.

-Suggested by Brad Podzius

BUILD 9.6.(1)6624.29416

FIXES

Correct ports in launch settings

8687 A change was made to correct ports in LaunchSettings.json.

-Reported by Ryan Posener

Assurance questionnaires (cascade and dependent questions not working as expected)

8682 If a question on a questionnaire was dependent on the answer of a previous question, it was supposed to be greyed out, until the correct answer had been given, but it was found that it wasn't. The dependent question is now greyed out until you give an answer to the "other" question that matches the criteria, then the question becomes active and required.

-Reported by Tim Johnstone

Questionnaire not appearing on screen for assurance request

8681 If a questionnaire with a checkbox as the first question was created, then an error message was produced "Uncaught TypeError: Cannot read property 'toLowerCase' of null…..", and the questionnaire did not render on screen (this happens if pes_Questionnaire_Apply assigns a questionnaire to an assurance request which has a question with a BIT answer and it defaults the answer to NULL. Must be either "true" or "false" otherwise the screen doesn't work)

-Reported by Tim Johnstone

Cannot Apply/Unapply Retainer

8669 It was found that when accessing the client DRS pages through the client financials dashlet, when on the Retainers Tab, if you selected either Apply Retainer or to Unapply Retainer, then nothing happened. This was corrected. It is worth noting that when Unapplying a Retainer, the date will not be the present date, as it undoes the original allocation, and so reverses it on the same date.

-Reported by Victoria Stephenson

Cannot Transfer a Retainer from Client DRS

8668 From the client DRS pages, on the Retainers tab, when selecting "Transfer to another client", nothing happened.

-Reported by Victoria Stephenson

Can't Refund a Retainer

8666 From the Client DRS and the Retainers Tab, when selecting Refund from the actions menu, nothing happened.

-Reported by Victoria Stephenson

White around the show zero values box in Edge Browser
8665 In Client's WIP Transactions, when using an Edge Browser, there was a white space around the tick box. This was corrected.
-Reported by Victoria Stephenson

Retainers on Client DRS transfer reference field
8667 From the client DRS pages, the retainer tab, when choosing to transfer a retainer, there was a reference field on the dialog box. This has been removed.
-Suggested by Andrew Hambly

Job History Duplications
8525 When changing the status of a job, two or three duplication entries were added to the history tab, so your change was listed more than once.
-Reported by Tim Johnstone on behalf of PBMares

Hours field and timer icon partly covered in others grid of timesheet entry in Edge browser
8664 In daily view of an Edge Browser, the hours field and timer icon were partly covered by the status field.
-Reported by Victoria Stephenson

Disbursement red highlighting not cleared when correct allocation added
8663 In disbursements when allocating within the batch, if you submitted a batch with a receipt missing an allocation, it was highlighted in red, but if you made a correction and added the allocation to the receipt, on saving, the red highlighting wasn't cleared.
-Reported by Victoria Stephenson

Transaction setting for selected country
8680 The Transaction setting for the selected country is over-written when a client is upgraded or updated.
-Reported by Mike Francis

Sub-Report downloads
8522 Sub Reports updated in the database didn't automatically re-download. A change was made to make it so that the sub-reports re-download is the master report is updated.
-Reported by Brad Podzius

MODIFICATIONS – 9.6.(1)6244.29416

Give warning if not all entries are completed when doing a bulk complete
8140 If some timesheet entries have a status of complete, active, approved or posted (anything other than active), when selecting to complete all, a message will be introduced to inform the user that not all entries were marked as complete. This works the other way around when selecting to Activate all.
-Suggested by Andrew Hambly on behalf of Francis Clark

Change client currency symbol display to stop change of global setting
8709 In Client DRS, you can switch between local and client's own currency view. Currency bindings and columns in the VGrid were refactored to take a parameter for currency symbol.
-Suggested by Ellis Birt

Add Standard Deposit Import with Allocations

8728 A Standard Import for Bank Deposits was added to allow users to specify a fee number to allocate the cash to.

-Suggested by Andrew Hambly

IndexedDb Comprehensive test removed

8702 An IndexedDb test on Auth sites was being run, but seemed to be failing. The IndexedDb Comprehensive test was removed.

-Suggested by Ryan Posener

Currency Symbol has two sources

8626 The currency symbol could be set differently in Transaction settings and in the web.config. This could result in strange behaviour. The currency symbol can now only be set in Transaction settings.

-Suggested by Andrew Hambly and Ellis Birt

Wording on the Disbursement posting grid actions needed changing

8732 When you are posting Disbursements, everything refers to the "Batch" except the "Add Claim" and "Remove Claim" grid actions. These were changed to say "Add Batch" and "Remove Batch".

-Reported by Mike Francis.

Unit-Based allocations on Disbursements added

8678 Unit based allocations on Disbursement Batches were added, mirroring the unit-based allocations area in expenses.

-Suggested by Mike Francis and Tim Johnstone

BUILD 9.6.(1)6687.27602

FIXES

Timesheets; When Applying Release On Complete setting, Complete All still displayed

8460 When setting the timesheets to "release on complete", the bulk actions menu would still show "complete all", and not "Release All". A change was made to try and ensure this change would happen quicker. ***It is worth noting the following when making changes to timesheet settings:***
When you change these settings, you must leave it overnight before the settings will change in both the action menu and bulk menu in Timesheets view. A caching issue is delaying the immediate update of the bulk actions menu and users need to allow plenty of time for the page, settings and permissions to be refreshed. A server cache clear, clearing browser caches or logging out and back in will not refresh the menus to the correct nomenclature. There is one instance whereby if you have the admin settings set for release on complete, and the staff setting also set to auto post on complete, that if the staff setting was previously "no auto post on complete", then the bulk menu will still show "complete all", and no CHECK message similar to the one produced when the menu says release on complete will be produced- so in this instance, active timesheets could be POSTED without a check message to stop it, and with the bulk menu saying "complete all" and not "release all".

-Reported by Victoria Stephenson

Tallie Imports were accepting Supplier as a field but the SP did not
8684 When using the standard Tallie Import and adding the supplier column to the import definition, when importing the data, the system would produce an error.
-Reported by Michelle Jenkins

Clicking cancel from the PEFiler documents page provided an error message
8505 From the PEFiler documents dashlet on the contact dashboard, if you clicked “Add Doc”, let the page load, and then clicked “Cancel”, the dashboard was not loaded, and instead an error message was produced.
-Reported by Victoria Stephenson

Target hours over if the following months timesheets aren’t created
8616 The target weekly hours calculation on a timesheet straddling the mon-end was incorrect. The Target hours were incorrectly increased.
-Reported by Brad Podzius

Error when uploading image to an Organisation in Admin
8531 in Admin, categories, Main categories, if you clicked on Organisations and upload an image, clicking save produced an error message.
-Reported by Adam Morgan

System Lockout Settings not logging users out
8699 If a user turned the system lockout setting on and the locked message was anything other than Locked, then the user was not logged out when the grace period had expired.
Linked to
System Lockout Settings page; expiry time not working properly when not in UTC
8700 It was found when setting up the system lockout setting, that if you are not in UTC, extra time was added when you clicked save.
-Reported by Michelle Jenkins on behalf of Warren Averett (15217)

GDPR-After deleting contact user was returned to previous page before deletion
8869 When deleting a contact from the Contact Data Summary page, the user was taken to the last page they were on before the deletion took place. In some cases, this caused an error message to be produced. Clicking on the back button returned the user to the data summary page and an “Object reference” error message was displayed. If the last page visited was the consent page, user was instead taken to the same page on deletion but there was no contact name showing.
-Reported by Victoria Stephenson

GDPR- Client Gain/Loss page listing staff in the grid
8868 In Admin, Data Maintenance, Expired Data page, it was found that Staff members were being brought into the Grid. The Expired Contact Data list was limited to show only people and company contacts, not Staff.
-Reported by Victoria Stephenson

No Dunning letter listed in the usage drop down for Email Wording
8777 In the Credit menu, Task pad, Dunning letters page, if a user selected email and print, the email wording drop downs were empty with nothing to select. From Admin, Categories, special Categories and Email Wording, if you clicked on a category link in the usage drop down, there was no “Dunning Letters” usage available to select.
-Reported by Michelle Jenkins on behalf of Price Bailey (15575)

StaffIndex displayed as Created by on Client Details as opposed to StaffName

8772 When you added a new engagement to an assurance request in 9.6, it ran "[pes_Assurance_Create_Engagement]" to add the record in tblVEngagement and that set ClientCreatedBy to @StaffIndex - not the user's name or code. When the assurance request was approved, it copied the content of ClientCreatedBy from tblVEngagement, to tblEngagement, and then you had a staffindex on screen which was meaningless to users. It did not do this in prior versions in Assurance. Clients created before 9.6 assurance, displayed a StaffUser in that position on screen which was easily read by users as it displayed a user's full name.

-Reported by Tim Johnstone on behalf of PBMares

Unit based allocation without description not showing on Client WIP when posted

8727 If a user entered a unit based expense entry and left the unit allocation description blank, and posted it (using any date type), it would have a status of posted, but would never arrive in WIP on the client.

-Reported by Tim Johnstone on behalf of Wiss (15443)

WIP Provisions entered outside of period dates

8714 Users were finding they could enter WIP Provisions outside of period dates.

-Reported by Tony Doyle on behalf of Buzzacott (15371)

Reports failing

8788 Reports were failing when loading a subreport from an internal source.

-Reported by Mike Caltagirone

PELerts changing days of the week when clicking on various headers

8730 When opening a PELerts on the weekly tab, if the tab view was changed to hourly or daily and returned to the weekly tab, the days of the week selected on the PELert changed.

-Reported by Larry Barge

Service Portfolio Dashlet including VAT in fees figures

8984 When clicking on the fees figure of the staff job ownership portfolio dashlet, the dashlet figure included the VAT amount, which it shouldn't have.

-Reported by Andrew Hambly

Formatting not kept when Emailing Invoices

8958 It was found that when emailing invoices, the resulting email has lost it's formatting and was delivered instead as dump of text.

-Reported by Brad Podzius

Expenses and Disbursements Object Reference error when saving and allocating

8934 In expenses and disbursements, if you added a receipt/invoice, filled in the whole form, and clicked save and allocate, an error message was displayed-"Object reference not set to an instance of an object".

-Reported by Victoria Stephenson

GDPR-ContCode not anonymised when anonymising a contact

8932 When anonymising a contact the ContCode was not being anonymised along with the name, so could still be identified.

-Reported by Michelle Harris

GDPR-Anonymised contacts showing in MRU as contact name
8931 When a contact was anonymised the contact name was still displayed in the MRU menu. The MRU updated eventually to show the anonymised name but not until the cache was cleared.
-Reported by Michelle Harris

GDPR- Consent tab on Assurance request showing for Organisation Contacts
8919 The consent tab within an Assurance request should only be shown for Person Contacts, but was showing for all contacts within a request (Person and Organisation).
-Reported by Michelle Harris

Delete Inactive Contacts page produces PE error message for some records
8933 When in the Delete Contacts page, and searching for inactive contacts, some records produced a PE error page.
-Reported by Michelle Harris

Disbursement import duplicating allocations
8922 If when completing a Disbursement Import some of the lines imported had the same supplier and reference, the allocations were duplicated.
-Reported by Andrew Hambly

Tags on new receipts not being saved
8877 when adding tags to existing receipts on the system and clicking save, the tags were saved. If, however new receipts were created and a few tags added to it, when clicking save, the receipt and all its contents BAR the Tags were saved.
-Reported by Victoria Stephenson

Staff Office or Organisation from staff security page showing inactive Offices/Depts
8876 When accessing the staff Office security settings from the staff's details pages, Inactive offices/departments were displayed.
-Reported by Victoria Stephenson

WIP Trans filter not working when applied on grid
8870 Within WIP Transactions of a client, the sort order on columns didn't seem to work.
-Reported by Michelle Harris

Resizing of image upload in categories
8875 It was found that the image that was uploaded on the categories page was too big, and the horizontal scroll bar didn't go far enough for users to reach the Save or Delete buttons, top right. If the image uploaded was too big, users could try and replace it with a smaller one, but it was still oversized and they couldn't scroll far enough to the right to save the changes.
-Reported by Victoria Stephenson and Andrew Hambly

Security link on another staff details screen
8816 When trying to update a user's permissions from their staff details screen, when clicking on the security button, users were directed to the logged in user's staff settings screen.
-Reported by David Kelso

Approved/Confirmable fees in fee portfolio allowing date editing
8787 Admin, Categories, Main Categories, Organisations and clicking on an Organisation, if the box for Approved fees was ticked, if you went to a client, created and submitted a fee, when you went to the Fee Portfolios page under Billing and inside the Approved/Confirmable fee folder, you

could click on Go with View selected in the drop down, and on the Header page you could change the date of the fee using the calendar icon button.
-Reported by Alex Priore

Saving time sheet settings has a side effect on staff settings in DB
8743 If a user made a change to the timesheet post on complete settings, the related staff settings were changed in the database. A change was made to ensure that any such changes should take place in the service layer and the standard SP should have a single effect.
-Reported by Ellis Birt and Andrew Hambly

0 hours work profile and completes timesheet unticked provides error message on leave approval
8710 If you had a staff user set up with a work profile with 0 hours on each day, 0 hours on their daily hours, and then un ticked the "completes timesheets" tick box in staff details, if they submitted a leave request and someone tried to approve it, you got a PE Error message.
-Reported by Michelle Jenkins

Timesheets outside current period displayed within analyse period page
8708 It was found that timesheets outside of the current were showing within the analyse period screen along with some duplications.
-Reported by Michelle Jenkins

Staff Leave Usage Portfolio/ Leave details page - not displaying correct figures
8689 In portfolios under the staff leave usage portfolio, when drilling into the detail, the figure on the portfolio was not matching what they had available on the details page when drilling in.
-Reported by Michelle Harris

Staff Leave Usage Portfolio displaying inactive staff
8688 In portfolios under the staff leave usage portfolio, inactive staff members were being displayed.
-Reported by Michelle Harris

Timer Auto-Stop Error (Timer Transaction error)
8977 If a timer was already running in weekly view, when adding another entry and starting the timer on the entry, and error message was produced. (The connection is already in a transaction and cannot participate in another transaction. EntityClient does not support parallel Transactions) If the error message was dismissed, and the entry saved, then two timers ran simultaneously.
-Reported by Victoria Stephenson

Out of Scope field not greyed out when no OOS reasons are active in Categories
8943 When all Out Of Scope reasons in Admin, Categories were made inactive, in timesheet entry with No task selected on a job that had tasks, the OOS field was active with OOS reasons listed.
-Reported by Michelle Harris

Client DRS Trans/Retainers actions show small white box instead of greyed out actions drop down
8927 It was found that when there were no options/actions available on a transaction, that you would see a blank box when clicking on the actions drop down menu. This was changed to instead display a greyed out "No Actions Available" message.
-Reported by Victoria Stephenson

After Azure AD login, redirect to App Fails
8949 If a user went to any PE URL logging on the Auth Site via Azure AD, the user remained at the Auth site not re-directed to the original page requested.
-Reported by David Kelso

Violation of Primary key error in assurance request on multiple engagements
8867 When creating an assurance request, clicking on engagements tab filling in the client details and clicking save, then adding a multiple engagement and clicking save, on clicking back on the original client and making changes somewhere on the page and saving, an error message was produced: "Violation of PRIMARY KEY constraint 'PK_tblVEngagement'. Cannot insert duplicate key in object 'dbo.tblVEngagement'. The duplicate key value is ….."
-Reported by Victoria Stephenson

Another test to be added to clear logged in user details
8795 It was found that when a user logged in as themselves, then logged out and straight back in as *another* user without first closing the browser, the system loaded the dashboard with the previous users' name, and their menus, not that of the newly logged in user.
-Reported by Victoria Stephenson and Andrew Hambly on behalf of Buzzacott (15717)

Description in timesheets
8746 Large descriptions on Timesheets did not have text wrapping, so when large descriptions were added to a timesheet entry, when the description column was added, users couldn't view the description and the save button disappeared to the far right of the screen. Text wrapping on descriptions was implemented.
-Reported by Victor Timotin on behalf of ABB and Tim Johnstone on behalf of Beavis Morgan (15532)

Covered grid when all columns added- productivity
7199 It was found when all the available columns were added to the productivity grid (Global Productivity > Chargeable value), the columns were all squished together. The last column had actions buttons on it, and the menu was covered when you click it.
-Reported by Victoria Stephenson

MODIFICATIONS – 9.6.(1)6687.27602

Improve Windows Authentication Handling
8745 A redirect was added for NoStaff, and a change made to how sign in cookies are issued from Windows Auth based on the updated IdentityServer recommendation.
-Suggested by Ryan Posener

Remove Standard EF SP's from Database
8735 Standard EF SP's were removed from the database and moved to specified SP's instead.
-Suggested by Andrew Hambly

Add Personal consent to Assurance and Contact Details
8815 Personal Consent was added to Assurance and Contact Details.
-Suggested by Andrew Hambly

Add GDPR Contact summary view
8785 The Contact Summary page was added, which would display a summary of the data held for a person contact. It will show basic details of address and phone numbers, relationships, attributes, events and questionnaires, along with a list of client codes associated with the contact.

-Suggested by Andrew Hambly

Add GDPR expired contacts list view
8784 A page was added to display a list of contacts that have been inactive for longer than the system retention period for contacts, or which have a client which has been lost for longer than the system retention period for clients. Selecting a contact in the list will navigate to the Contact Data Summary page.
-Suggested by Andrew Hambly

Add GDPR Retention periods to Transaction Settings
8783 A new transaction setting for Contact Retention Period and Client Retention Period, both in years, was added to PEWC.
-Suggested by Andrew Hambly

Time Entry button to be disabled when job is complete or closed
8713 It was requested that when in a job that is complete or closed, that the “Time entry” button be disabled.
-Requested by Adam Morgan on behalf of BPB

Change Zero Bill confirmation to stop populating bill amounts
8948 A change was made to the Zero Bill confirmation to stop populating Bill Amount values.
-Suggested by Tony Doyle and Andrew Hambly

Remove the reference field from the Retainer Refunds dialog
8742 A reference field accessed from the Client DRS retainers tab, was removed as it was in the transfer of retainers screen/dialog.
-Suggested by Victoria Stephenson and Andrew Hambly

Custom Global Management Lists
8936 A framework was created for 5 custom job management lists by service with permissions that can be set in PEWC. If you go to Main Portfolios, Custom Job Portfolios in Categories etc you can add a new custom portfolio by giving it a name, selecting the services to be included and giving permissions to the required groups. Following a server cache clear and clearing the local and sessions storage, on refresh, you should be able to go to the staff task pad and the new portfolio should be listed with the name you gave it, providing you gave yourself permissions.
-Suggested by Andrew Hambly and Brad Podzius

Add Role selection to Job Forwarding
8929 The ability to select the role as well as the staff to be used when forwarding a job was added. If the selected staff isn't in the selected role then they should be added at the same time the job is forwarded.
-Suggested by Andrew Hambly on behalf of BPB

Portfolios - Convert Staff Rates List from Classic
8944 The Staff Rates list was converted from classic to Version 9 page. The functionality is the same, but a search to filter staff was added. Also, the list will only return rate 1, the standard rate, as that's the only rate that all systems have. If Users want other rates to show they should use the custom columns.
-Suggested by Andrew Hambly

CSS Grid improvements

8920 Grids were updated to CGrid from VGrid, for all browsers apart from IE, which will still show the same VGrid.

-Suggested by Ryan Posener

Make Auth Standalone

8921 The Auth site was made to be workable as a standalone app.

-Suggested by Ryan Posener

BUILD 9.6.(1)6697.19516 – HOTFIX3

FIXES

CGrid issue in Edge Browser

9011 In an Edge browser on a laptop, when trying to access the client search grid or the Disbursements grids, the grid wasn't loading, and the Headers were showing at the bottom of the page. If the problem resolved itself and the grid was loading, the headers were still showing at the bottom of the page, until fully loaded.

-Reported by Michelle Harris

BUILD 9.6.(1)6779.31076 – HOTFIX5

FIXES

TLS 1.2 Prevents loading of PE/Application

9339 When site is restricted to TLS 1.2 and HTTPS only, the /PE application would not load with a Socket Error. A change was made to ensure that the site will load when using TLS 1.2.

-Reported by Larry Barge

BUILD 9.6.(1)6787.27228

FIXES

Timer Auto-stop Error

8977 If a timer was already running in weekly timesheets and another entry was added and the timer started on the new entry, an error message was produced: "The connection is already in a transaction and cannot participate in another transaction. EntityClient does not support parallel transactions". If you dismissed the error and clicked save on that entry, you would see two timers running simultaneously.

-Reported by Ryan Posener

LockOutHub InvalidOperationException

9290 After working in debug mode for some time the system would trigger the aforementioned event, as the SignalR hub could not be constructed due to Unity Registration changes. This was fixed.

-Reported by Ryan Posener

Fix Reallocate and Receipt Transfer issues
9258 If the receipt was the only outstanding item on a client you couldn't transfer or reallocate it as it gave an error about creating an allocation. If on the off chance you could do the reallocation or transfer, the selected client on the next page was incorrect.
-Reported by Andrew Hambly

Tables not populated with data for security admin
9261 Some of the tables for security admin were not being populated
-Reported by Andrew Hambly

Receipt Transfer and reallocation aren't selecting the right clients
9123 The redirect when reallocating a receipt or doing a receipt transfer wasn't setting focus to the current client.
-Reported by Andrew Hambly

Re-Allocate typo in DRS actions Menu
8997 From a client's financials menu, when clicking on the DRS figure then the actions me4nu beside a receipt, there was a Typo on the word "Re-allocate". This was corrected.
-Reported by Vicky Stephenson

WIP Trans and Data Exports
8995 From and Clients Financials Dashlet and WIP figure, when on the print tab if you clicked on the Show Zero values tick box and clicked the data button, the spreadsheet was showing the WIPHOURS field with zeros, but if you unticked the Show Zero Values tick box and again clicked the data button, the spreadsheet STILL displayed the WIPHOURS field with Zeros- this was corrected.
-Reported by Larry Barge and Vicky Stephenson

Report Macros; Semi colon added to the sender email address prevents macro from being sent
8994 When no other recipient was listed for the macro other than the creator, a semi colon was still inserted after the creator's email address when added to tblEmailQueue, which caused the email to get stuck in the sending state.
-Reported by Adam Morgan

Edit DRS Collection; Click save after viewing and the document is removed
8992 From a client's DRS, when clicking on the actions menu from an invoice and selecting collection details, if you viewed a document, closed it then clicked save instead of cancel in order to close the window, the document was removed.
-Reported by Larry Barge

Assurance; Unticking active box when adding services isn't saved to the approved client
8979 When creating a client in Assurance and adding services, if you unticked the service active tick box, then once the client had been approved, upon checking the services on the client, those services were showing as active. This has been corrected.
-Reported by Victoria Stephenson

Jobs; Unable to add more than one person in Overrides by Staff
9267 It was found that users were unable to add more than one staff to a job rate in the "Overrides By Staff" section, nor could it be deleted once added.
-Reported by Adam Morgan on behalf of Larson Gross (17797)

Allocating a receipt in DRS returns the user to the client search, not the allocations list

9265 From the client's DRS, and allocating a receipt and clicking confirm, on completion the system was returning the user to the client search screen. This has been corrected and users will now be returned to the DRS screen for the client.

-Reported by Victor Timotin on behalf of RBK (17761)

Cannot Transfer receipts when there's no O/S invoices on the client you transfer from

9005 When trying to transfer a receipt from a client with no existing O/S invoices, users were presented with an error message: "Sorry could not create draft allocations. No entries to allocate against". Users weren't getting to the point of selecting someone to transfer the receipt to.

-Reported by Tony Doyle on behalf of WSB

An issue with the new CGrid in Edge browsers

9011 When using a laptop screen and accessing the client search grid or disbursements grid, the grid wasn't loading, and all headers were loaded at the bottom of the page. To combat this issue, Edge browsers will use the Original VGrid.

-Reported by Michelle Harris

Timesheet totals not refreshing after deletion of entries

8988 In a weekly timesheet displaying a few entries, if one entry was deleted, the totals at the bottom of the grid were not updated.

-Reported by Victoria Stephenson

Addition of support for additional connection strings for reports service, set per report

8774 If a user added a second ActiveReports Report Engine into a system, to allow reporting off of a warehouse DB for example, the list of reports kept producing more copies of the reports you could see in the current PE system.

-Reported by Tim Johnstone

Unable to Roll a Job

9020 It was found when rolling a job, that an error message would display: "The underlying provider failed on Rollback"

-Reported by Michelle Harris

Client DRS and Collection Details not saved correctly

9284 On clients without an email address saved, if you went to their All client details and DRS/Collection tab and added an email address, you clicked apply to save your changes, but having navigated away and then back to their All details pages, the email address was no longer showing and hadn't been saved to the page. If however you opened up the DRS/Collection page from the Task pad of the client, the email address was showing, so although the change had been written to the tables, it wasn't showing on the All Details page for the client.

-Reported by Tony Doyle

Print button active in the Others tab when the grid hasn't yet been filtered

9283 In timesheets, Other's Tab, if you clicked on the print icon an error message was produced: "Input string was not in a correct format", however if the user searched for a staff member and selected their name before clicking print, then the error message was not produced. A change was made to ensure that the Others Tab is disabled until the user has first filtered the grid by staff name.

-Reported by James Arthur and Victoria Stephenson

Able to save all options on Job Notes for actions on jobs when completed or deleted
9277 It was found that a user could save all three actions/options on a note when either saving it on adding or editing once saved. This caused confusion so to combat this the descriptions were changed to better explain what each option will do.
-Reported by Victoria Stephenson

Configuration issues with datepicker format
9198 Dates weren't showing correctly given the browser settings. A change was made to correct this and ensure that the dates shown in the system mirror those set on the browser.
-Reported by Ben Edwards

App_Data folder not always created by WebDeploy
9118 After running a WebDeploy, the App_Data folder was not always being created. A Manifest was created to ensure that App_Data is created.
-Reported by Ricky Siu

Add Unposted WIP in fees not handling NULL Descriptions on Unit Allocations
9009 The same change made to the expense posting routine to handle posting of unit-based allocations that had a NULL description, has now been applied to the Add Unposted WIP routine.
-Reported by Andrew Hambly

Today button in Draft Fees setting today's date to the end of period date instead
8930 When in a draft fee on a client, if the user clicked on the "today" button, the system was setting the date to the period end date instead of the current day's date.
-Reported by Victoria Stephenson

Refresh needed in order to get the time entry button in a job disabled
8996 When a job is marked as either pending, completed or closed, the Time entry button is disabled, but it was found that once you saved your change (to either mark your job pending, complete or closed), the user had to refresh the page in order to see the time entry button disabled. This was changed to be immediate, and the system will refresh the page itself.
-Reported by Victoria Stephenson

Source for business in Prospects not listing items alphabetically
9287 The list of available items in the Source for a Business in the Prospect and Pipeline system had no order to it- so this was changed to be alphabetical.
-Reported by Mike Francis

Status Column in Classic Approval
9300 From the Classic Approval page, the Status column was added as a default, as this would be the only indication to the user that the approve or reject has been successful.
-Reported by Michelle Harris

Recurring fees report correction to Master SP
9269 An issue with a standard report coming from recurring fees was corrected in the Master Database.
-Reported by Ben Edwards

Change to Engagement update SP

9121 A change was made to the time and expense update SP to only change unposted expense entries.

-Reported by Tony Doyle

Billing Guide Report Issue

9141 The billing guide was not pulling through complete or active unposted time.

-Reported by Michelle Jenkins on behalf of Rawlinson and Hunter and CSH (17194 & 16774)

Upgrader to map jobs on calendar entries with a CalJob of '0'

9076 The upgrader was updated to handle mapping a job onto calendar entries and leave requests.

-Reported by Tim Johnstone

Weekly Approval error message when Approve All clicked

9002 When in weekly approval in timesheets, if a user clicked on the Approve All button on the left of the screen, the following error was displayed: "Must declare the scalar variable "@UpTo".

-Reported by Michelle Jenkins on behalf of Rawlinson Hunter (16871)

Exact same entry entered twice in daily view produced error message

8973 When adding an entry in a daily view timesheet, if you clicked save and complete and added another entry exactly the same, when you clicked save and complete the second time, it produced the following error: "The Timesheet cannot be released because of the following problems… The Status is not ACTIVE or REJECTED". On Dismissing the error message, the grid would then display two timers running simultaneously.

-Reported by Michelle Jenkins on behalf of Muellor Prost (15227)

Print tab in client WIP not loading correctly

9019 When a user went to the WIP screen of a client they received they were greeted by a blank screen with grid actions drop down options and icons shuffled to the left-hand side of the screen.

-Reported by Victoria Stephenson

Collection details page had a line through the text

9308 Within the collection details page (accessed through the client dashboard and the DRS figure from the client Financials Dashlet), there was a line through the text at the top.

-Reported by Victoria Stephenson

Duplicate View Allocation actions in DRS for Credit Notes

9307 When accessing the DRS from the client's Financial dashlet on their dashboard, when clicking on the actions drop down beside a credit note transaction, the "View Allocation" option was duplicated.

-Reported by James Arthur on behalf of RBK and RSM (No ID Supplied)

Complete button on Entry view

9297 When changes for Classic Approval were applied, the Complete button in Timesheet Entry view wasn't visible. It was changed in colour from Blue to Green.

-Reported by Michelle Harris

Copying an entry and cancelling produced confusing error message

9095 A user copied a timesheet entry using the action menu beside an entry, and on selecting a new day/week, and clicking New from Copy, then clicking cancel on the entry dialog box, the

following message was produced: “A time entry was created when you started a timer. Do you wish to keep it?”. This message was edited to prevent confusion.
-Reported by Michelle Harris

Returned ORG request in validate list had no submit button available
9279 If a user returned an assurance request for an Organisation, when the user returned to make changes to it and saved those changes, the submit button was not displayed. This was corrected.
-Reported by Michelle Harris

Unable to add additional people or Organisations to a request after adding the initial entity
9286 In Assurance when creating a person or organisation and saving the details, the buttons to add another person or organisation on the left-hand side of the screen were missing.
-Reported by Michelle Harris

Other Tab not loading entries in the grid when first accessed
9292 From the timesheets Others tab, no timesheets were loading even though the header assured the user of several entries. The user found that if they returned to their own timesheet entry page (My Timesheets>Entry), and navigated back to the Other tab, that the entries were loaded.
-Reported by Victoria Stephenson

Changing “Send Bills to Address” reverts to first in the list in UI
9051 From a client’s details with multiple addresses, on accessing the client’s jobs page and the billing tab, if it was set to use the default address, and the user unticked that option, the “Send To” drop down appeared. On selecting the new address and clicking to save your changes, the address was changed to the first address in the list. This happened in the UI, but in the tables, it had been set/recorded correctly with the address selected and saved by the user.
-Reported by Adam Morgan on behalf of CBIZ (17145)

Adding new Organisations to Prospects would not employ the Duplicate check
8489 From All Prospects or My Prospects, and clicking Add, when a prospect is set up as a person, and that same name is used for a prospect for an organisation, the organisation duplicate check didn’t find it.
-Reported by Michelle Harris on behalf of Deloitte Bermuda (No ID Supplied)

No text wrap on Narrative caused timer to be covered in the grid
9260 When an entry contained a lot of Narrative, the grid didn’t wrap the contents and so the timer in the grid became unavailable.
-Reported by Michelle Jenkins on behalf of Blick Rothenburg (17726)

Assurance Attribute page not taking notice of restrictions in editing permissions
9282 When restrictions had been placed on who could edit/add detail to a particular attribute, the system wasn’t taking those permissions into account.
-Reported by Victor Timotin on behalf of KSM (17707)

Automatic Timesheet creation not working correctly
9017 The automatic timesheet posting tick box didn’t seem to be creating timesheets in advance, and users were still having to manually create them in spite of that setting being enabled.
-Reported by Brad Podzius

Actions on the Timesheet Grid not updated correctly
9318 From Timesheet entry, when completing a timesheet from the actions drop down menu on a line entry, that particular entry was not completed- another entry from the grid was duplicated and the newly completed entry was lost from view. On pressing F5 from the keyboard, the grid refreshed and the completed entry was returned to the grid, in the correct status and the duplication was cleared.
-Reported by Michelle Harris

Suggestions view covered by CGrid
9317 From timesheet entry, when opening up the suggestions panel, the panel was covered partially by the timesheet entry CGrid.
-Reported by Michelle Harris

Attachments not being sent with emails
9309 When emailing invoices with attachments, it was found that the attachments weren't always making their way to the other side.
-Reported by Michelle Jenkins on behalf of RBK (17777)

Request a New Engagement from Contact > Clients page not working
9294 From all Contact Details, if the user clicked on the Client tab and the Request a New Engagement button, nothing happened.
-Reported by Michelle Harris

View contact notes not saving
9293 On the contact details for an Organisation, if the user clicked onto View contact notes, clicked Add, created a note and saved it, the note was not being saved and the dialog was remaining open.
-Reported by Michelle Harris

US Date Format displayed in UK timesheet view
8955 The system seemed to ignore the settings applied in the browser, and would use the same date as the server, instead of the local settings set by the user in their browser on their machine.
-reported by Victoria Stephenson

Max results and columns button overlapping
9295 From the contacts > clients page, the max results field and columns button and drop down were overlapping.
-Reported by Michelle Harris

Current day in timesheets had no total hours figure at the base of the grid
8960 In either daily or weekly view, when looking at the current day in the timesheet grid, there were no current day hours displayed.
-Reported by Victoria Stephenson

Updating Workflow Status from Timesheet Entry not updating Notes and History on Jobs
9021 From Time entry, if a user entered a client and job then went to the Workflow field and clicked the Update button to change the Workflow Status and clicked Set Workflow, the notes and History on that job were not being updated.
-Reported by Brad Podzius

Screen not updating after a timesheet has been approved or rejected in Classic Approval
9299 From the Classic Approval screen when approving or rejecting an entry, the screen was not updating to show the correct status.
-Reported by Michelle Harris

Selecting a Lost client from the extended client search in timesheet entry
9015 On creating a new timesheet entry, if the user entered a lost client into the search field nothing would appear, though if you clicked the search icon beside it, you could clear the search field on the dialog and add the short code of the lost client and set the status drop down to blank. When you then clicked search the lost client was displayed in the results, and on clicking on the lost client, it was added to the timesheet entry.
-Reported by Tony Doyle on behalf of Withum (17063)

Contact Tab in Add New Connection not displaying details
9302 From either the Client or Contact Connections page, if a user added a New Officer, Provider or Staff, searched for a person and selected them, the dialog was displayed but none of the contact details of the selected person were displayed.
-Reported by Michelle Harris

Preferred Contact Hyperlink not loading contact details
9301 From the client's all details contact page, if a user clicked the preferred contact name hyperlink, the contact details opened as a new browser tab, but displayed only the details of the same contact, not the preferred contact.
-Reported by Michelle Harris

Needing to scroll for a long time to reach the close button when printing a fee
9018 From the client's DRS screen, when printing a fee, using the actions drop down on a client with a long list of fees that run off the screen, the user needed to scroll the page whilst in the print view to get to the print and close buttons.
-Reported by Tony Doyle

Contact Attributes page displaying blank
9366 When on a contact's all details screen, if the user clicked upon the contact attributes tab, the page would not load.
-Reported by Victoria Stephenson

Undo button in contact attributes page not working
9365 From the client's all details and contact attributes page, if a user made a change to the attributes page and clicked Undo instead of Apply, confirming the resulting check message in the process, the page refreshed but the action of Undo was not honoured.
-Reported by Victoria Stephenson

Files not Read-Only
9375 It was discovered that files set to be read-only, were being displayed as editable by the system. This was first noticed in the attributes pages when an attribute was made read-only via the attributes permissions page, and the system still allowed a user to upload a document to that attribute and save it to the page and attribute.
-Reported by Ryan Posener

Emailing from Client DRS Trans page ignoring system options set for email addresses
9353 If you had a system option that defined the From, CC or BSS address for an invoice or statement then that option was not being used when sending the email.
-Reported by Andrew Hambly

Error received when activating new staff
9337 When adding new staff to the system, an error message would appear
9349 when clicking the PE generated link to confirm/activate the staff members account. This was caused by a missing _Modernizer_Features file from the build.
-Reported by Alex Priore on behalf of Withum (18136)

Drop down values from client and contact attributes not displaying initially when set and saved
9357 From the client's all details and contact attributes page, the user made changes to drop downs and clicked apply, though when making another change and clicking apply a second time, the value wasn't displayed
-Reported by Michelle Harris

Submit button not displayed on Assurance Contact Details page
9358 On creating a new person or organisation request and adding contact details, a user then clicked onto the Engagements tab, added client details and again clicked save. The submit button disappeared. The submit button only displayed when on the services, jobs, staffing or source details tabs.
-Reported by Michelle Harris

Incorrect page formatting on contact pages
9347 From client or contact details pages, contact tabs, the updated date and user information was incorrectly formatted.
-Reported by Victoria Stephenson

Couldn't add a WIP provision from the provisions tab in Client WIP Transaction page
9342 From the Fee Portfolio screen in Portfolios, when clicking on entire portfolio and then a client, if the user clicked on the provisions tab and then the line to open the WIP provisions panel, it was found that on entering a WIP balance, a provision, a new date and clicking save that nothing happened.
-Reported by Tony Doyle on Behalf of Buzzacott (18209)

Separate activate button displayed when clicking save and complete
9344 With the Classic Approval setting turned on, a user would add an entry entering all details and then click save and complete. If the user navigated away and back again, the page would show both a complete and an activate button at the top and right of the grid. As the Timesheet Header had not been completed in this instance, only the entry itself, then the activate button should not have been displayed.
-Reported by Victoria Stephenson

Able to complete an entry in the classic approval grid when the entry did not contain all details
9319 On adding an entry and adding only the client name, if the user clicked save, followed by the classic approval complete button, in order to complete the timesheet header, the active entry was marked as complete, even though the entry didn't have all the details necessary to be completed.
-Reported by Michelle Harris

Unable to access Client/Contact All Details screen

9343 When going to a client's task pad and selecting All Client Details, the user was met by the following error message: "Sequence contains no matching elements". The exact same error message was produced when accessing the All Contact Details page, the client details page, the client connections page, the contact attributes page, or the contact photo page.

-Reported by Victoria Stephenson

Clear Interest button on Client DRS page not refreshing the grid when clicked

9341 If the IntClear permission was in use (non-standard permission), a button appeared on the Client DRS page to allow all interest entries to be reversed. On clicking that button the grid didn't refresh, and so displayed all the outstanding interest charges.

-Reported by Andrew Hambly on behalf of Jackson Thornton and Aprio

Typo in check message when completing timesheet header in Classic Approval

9338 If a staff member marked a timesheet header as complete, a message was produced asking the user if they were sure they had entered all their time, but the word "entered" was spelt incorrectly.

-Reported by Michelle Harris

Status in Classic Approval not changing when Approve clicked

9320 When in the Classic Approval pages, if a user approved a timesheet some occasions this would work, but it would not work if the timesheet also had posted time on it. In that case the status was not updated.

-Reported by Michelle Harris

Clicking Next after adding a suggestion caused the following entry to be added to the week start

9311 In weekly view, on opening the suggestions panel with suggestions showing for midweek, if the user dragged a suggestion onto the timesheet and clicked onto the Next button, a new dialog box was opened but the day displayed was for the start of the timesheet week, with no option to change it.

-Reported by Michelle Harris

Rearrange email dialog from Client DRS view to include PDF preview

9340 When emailing a fee, statement or RFP receipt there was no preview of the PDF to be sent, as there had been in previous versions.

-Reported by Andrew Hambly

Classic App calling incorrect SP's when emailing

9372 The Classic Application was calling the incorrect SP's when emailing.

-Reported by Andrew Hambly

Autocomplete on search field for a questionnaire returning too much data

9381 It was found when trying to fill out a "Client take-On" questionnaire set up on the test site, that one of the questions (Local Client name) set as a search field, was crashing the site. A change was made to stop the Autocomplete from returning too much data.

-Reported by Victoria Stephenson

Attributes values added in assurance weren't applied to the attributes in the client or contact

9380 If a user created an assurance request (Person or Organisation- so not dependent on whether they were a client or not), if they added contact attribute values, submitted and validated the request, on navigating to the contact attributes from either the client details or contact details

screens, the values entered within the assurance request were no displayed, and hadn't been copied through from the assurance request on approval.
-Reported by Michelle Harris

Rounding error when opening entry in timesheets
8443 In the weekly view of timesheets, when opening an entry in the grid, the system was producing a rounding error.
-Reported by Victoria Stephenson

Job Deadline dates calendar partly covered in IE browser
8508 Within the Dates tab of a client's job, when clicking upon the Deadline dates field, the calendar pop-up was partially covered by the menu header, in an IE browser.
-Reported by Michelle Harris

MODIFICATIONS

CSS-Grid Improvements
8920 New Grid capabilities for modern browser were installed.
-Suggested by Ryan Posener

Fix Assurance Request Loading/Saving Button States
8923 A fix was applied to correct loading and saving buttons within assurance. The Recurring Checkbox was also removed from Services within Assurance set up.
-Suggested by Ryan Posener

Add custom auditing as a standard feature
9259 A new feature was added to allow custom auditing as a standard feature. It adds a new PEWC item to allow database columns to be audited, and the data is stored in tblAudit.
-Suggested by Andrew Hambly

Increase Performance to Timesheet List SP
9257 Extra indexes to tblDates and tblTSO_Details were added to improve timesheet weekly performance.
-Suggested by Andrew Hambly

Replace Timesheet client lookup with specific call using an SP
9001 The timesheet client lookup was switched to use a specific call using an SP so that clients can override the results.
-Suggested by Andrew Hambly

Message in Server Cache clear revised
9006 It became apparent that the message in the server cache clear tab in Security Admin was too complicated and needed explaining further. A change was made to the message displayed on this screen, with a high emphasis on the permissions changes and how they are affected by a server cache clear.
-Suggested by Vicky Stephenson

Add "Remember" checkbox to simple Client Search
8998 A checkbox was added to the front of the simple search box to control if the entered search terms are remembered between visits to the client search page.

-Suggested by Andrew Hambly

Leave Partner/Manager blank when adding bulk jobs
8611 It was requested that when using Bulk Client Admin to create jobs for clients, that new jobs inherit the Client Service Partner and Client Manager for each client at the time the jobs are created.
-Suggested by Victoria Stephenson on behalf of Larson Gross (15139)

Client VAT number expanded to 25 characters
8773 Swiss companies have VAT numbers longer than the standard 15 characters set up on PE, so this has been changed to allow VAT numbers of 25 characters in length.
-Suggested by Ben Edwards (Feature Req)

SQLServer DacPac not referencing Auth DacPac
9000 The DacPac references didn't chain, and that reference was added to the SQLServer Project.
-Reported by Ryan Posener

Add Master tasks to Job Templates
9186 It requested that when adding Master Tasks to a job, the code field be visible, and to add a search feature for tasks. You can now search for a Task name in the subject field, and add one from the search facility, or you can use the Add Task drop down and select Add Master Task, and a list of Master Tasks will be loaded, and once selected, will be added to the lists of tasks available for the job.
-Suggested by Ryan Posener (Feature Req)

Job Batch Updates action recording
9168 When doing Batch updates, the first default option was "Delete". This was made the last option in the drop down, and Please Select was placed at the top of the list.
-Suggested by Ryan Posener (Feature Req)

Job Roll option to delete notes
9177 When closing a job and rolling that closed job, in addition to the currently available option of rolling the job notes over along with the job, the option to delete job notes was requested. Please see related documentation for guidance on the different options available to users when closing jobs and rolling them, with regards to notes.
-Suggested by Andrew Hambly (Feature Req)

Build Updater Log functionality
9170 The ability to export the review log to CSV/Excel (Or write an SSRS view if the data is stored in a table), was added, to make chasing down failed transactions simpler.
-Suggested by Ryan Posener (Feature Req)

Jobs; Add Extend All Option on Jurisdictions
9173 An Extend All check box was added to the Jurisdictions tab of the Job to prevent users from having to do so individually.
-Suggested by Brad Podzius (Feature Req)

Add Back Button to Details page
9175 A "Back" button was added to Job details, accessed by clicking to open the job fully as opposed to the panel view within the grid.
-Requested by Ryan Posener (Feature Req)

Add link to Job's Schedule if using new Scheduling App
9178 Addition of a link button to scheduling from the Job Page.
-Suggested by Ryan Posener

Replace Staff on Roles when no staff are assigned yet
8612 Bulk Job feature changed to allow the replacing of Staff on Roles when no one has been assigned already.
-Suggested by Ryan Posener - 15140 (Feature Req)

Refactor to make all async calls follow naming convention
8989 A change was made to ensure that all ASYNC calls now follow naming convention.
-Suggested by Andrew Hambly

Job Actual Start Date
9179 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
-Suggested by Ryan Posener (Feature Request)

Add Variables to Job Name and Job Code
9176 The following Variables in the Job Name or Job Code will return the Two-digit day from the Period Start or Period End date: [PSD] – Job Period Start Date, [PED] – Job Period End Date.
-Suggested by Brad Podzius (Feature Req)

Enhancements to Prospects system
8985 It was requested that the prospects system be enhanced. For details of these changes please see the relative documentation on the Prospects System.
-Suggested by Mike Francis

Job Auto-populate Roles
9167 If roles such as Partner, Manager and In-Charge are set up, they should be auto-populated from the Job Staffing.
-Suggested by Ryan Posener (Feature Req)

Addition of search field in expense approval page
9280 The addition of a search box to the expense approval page was requested and applied.
-Suggested by Brad Podzius (Feature Req)

Add a "Classic Control" (Classic Approval) option back into Timesheets
9270 The Classic Approval option was added to Timesheets. This can be enabled from the Timesheet Admin settings page. For more information on how this works and interacts with Version 9 timesheets, please refer to the relevant Classic Approval Timesheets documentation.
-Suggested by Andrew Hambly (Feature Req)

Allow receipts to be select on unit-based expense allocations
7901 When editing an expense claim, it was requested that a user be able to select a receipt on a Unit Based allocation, to allow fuel receipts to be linked to mileage claims.
-Suggested by Andrew Hambly and Michelle Harris (Feature Req)

Client budget pages re-skin to Version 9

5223 The Client Budget pages were re-skinned from Classic to Version 9

-Suggested by Andrew Hambly

BUILD 9.6.(1)6796.16617

FIXES

Preferred Contact displayed on contacts who've not been marked as preferred

9387 When on a contact's connections tab within details, on opening a contact who was not marked as preferred, it was found that on opening the contact details of that connection, the preferred contact field was actually marked as "yes".

-Reported by Mike Francis

Unable to add/Remove preference to/from contact client or contact connections

9388 From either the contact or client connections tab from their all details pages, on clicking on a contact marked as preferred, and clicking the "Clear preferred" button, the dialog was closed but preference was not cleared- not even with a refresh of the page. Equally, if the user clicked on the Make Preferred button on a contact, although on closing the dialog, the tick was removed from the contact previously marked as preferred, that tick was not transferred to the new contact, and on refreshing the page, the preference tick was returned to the initial contact.

-Reported by Mike Francis

BUILD 9.6.(1)6842.22836

FIXES

Reject all from Job Approval Page didn't close the dialog

9488 From the timesheets Job Approval page, when a user clicked the Reject all button, the entries were correctly cleared from the page and rejected, but the Reject All Timesheet Entries note dialog was not closed afterwards.

-Reported by Victoria Stephenson

Error message when clicking Reject All from Weekly Approval page

9486 From the Timesheet Weekly Approval page, when a user clicked Reject All, followed by the Reject button at the bottom on the dialog, the following error was produced: "Must declare the Scalar Variable "@Approved".

-Reported by Victoria Stephenson

Approved entries in Timesheets > Other, displayed in incorrect colour

9485 When navigating from Timesheets > Others > Approved, or My Timesheet > Approved, the Approved timesheets were displayed in the grid in red, when they ought to be displayed in green.

-Reported by Victoria Stephenson

Unable to remove date from within connections

9417 It was found that when in all client details > connections, when either adding new, or editing an existing connection from the relationship tab, users couldn't remove the relationship date and save that change.

-Reported by Victoria Stephenson

Fix Unqualified joins
9482 Reported Unqualified joins were removed.
-Reported by Andrew Hambly on behalf of Hays Macintyre

Expense Posting using StaffIndex instead of StaffUser for WIPCreatedBy
9384 The expense posting was using StaffIndex instead of StaffUser for the WIPCreatedBy on new WIP Transactions, and this was changed.
-Reported by Andrew Hambly

Addition of Unique Index
9383 A unique Index was added to ensure a unique Job Code per Client.
-Reported by Andrew Hambly

Weekly Approval; edit and save was posting entries.
9487 In weekly approval, when selecting a timesheet for a user whose timesheet settings allow automatic posting, if selecting to edit that entry and clicking Save, the entry was being Posted, instead of the changes being saved. The Save button was doing what Save and Approve would have done, which was to save the details, and on approval, post the entry, as per the settings on the focused user.
-Reported by Victoria Stephenson

Reversing Interest Charge in Client DRS and Grid not refreshing
9401 When selecting 'OK' after reversing a finance charge, the page did not refresh, which made it hard to know which ones were still outstanding when reversing individual entries.
-Reported by David Kelso

Unable to print from Staff Department diary
8775 From the Staff Department Diary, if the user made some selections to filter results and clicked refresh and then print, an error message would be produced.
-Reported by Victor Timotin on behalf of Hogan Taylor (15583)

[QQ] Job Codes issue
8926 Selecting a template that uses [QQ] first in the name wasn't bringing through the Job Code when the Job was created. This was happening in both Job Creation and Assurance.
-Reported by David Kelso on behalf of Larson Gross (15164)

Staff with an ended date appearing in Security Admin pages
9354 If a Staff user had an ended date, they were listed in the Group List or Members List in the Security Administration page in Admin.
-Reported by Michelle Jenkins on behalf of Buzzacott (18162)

"Created By" equalling Null in tblJob_HeaderChanges
9329 The created by within tblJob_HeaderChanges was null in the tables.
-Reported by Michelle Jenkins on behalf of Buzzacott (18150)

No Hours showing in Hours Column in Timesheet Week details
9314 When in Posting pages within Timesheet Admin, and viewing the approved timesheets to post, the hours column was blank.
-Reported by Victoria Stephenson

Bulk Job Updates/Extensions

9348 The Bulk extensions feature in the Bulk Job update pages to be rewritten for the change already previously made, that switched the extension date calculations from “not extended, first extension, second extension” to new logic, that ties the extension dates to the jurisdiction statuses. Nothing seemed to happen previously to the batch of jobs as there was no pop-up to select an extension jurisdiction status to change the jobs to. It was also noted that there’d be a need for something to select the service that users wanted to use for the status, as the Jurisdictional statuses are allocated by service and an error would be required to indicate jobs that were not in the service that the user selected.

-Reported by David Kelso

Overrides set on templates not showing on Jobs set up on assurance or the client Jobs page

8999 If overrides by staff or by grade were set up on a template, the overrides weren’t present once the job was set up on a client through the client jobs page or through adding the job using that template in assurance

-Reported by Alex Priore

Unable to add entries to an incomplete timesheet week if week is closed

9281 If a timesheet was closed from the timesheet admin pages, if a user went to that timesheet and tried to add an entry, clicking save or save and complete within the timesheet entry dialog, the following error message was produced: “Timesheet Details cannot be saved. The Timesheet for these dates is closed”. Any user who has not met their target hours for a week should be able to add new entries to their timesheets when that week has been closed in admin. The same should be the case for admins entering time for staff users from the Others tab.

-Reported by Michelle Harris

When Job Roles are changed, notes are duplicated

9278 When adding staff to roles on a job, it was found that the notes and history on the job were being doubled/duplicated.

-Reported by Victoria Stephenson

Check button in timesheet posting page displays error message

9190 Within the timesheet admin pages and the Posting tab, if a user clicked on the Check button, the following error message was produced:” ‘en-GB’ is an unexpected token. Expecting white space. Line 12, position 188”.

-Reported by Tim Johnstone

Consent data grids still viewed as VGrid and not CGrid

9013 In Chrome and Edge browsers, the data page grids were showing VGrid as opposed to the new CGrid. It was found that there were issues in using the VGrid layouts in both Edge and IE, so the consent data grids will only be shown in the CGrid format in a Chrome browser, whilst IE and Edge browsers will use VGrids.

-Reported by Victoria Stephenson

Client search showing DRS Trans instead of A/R Trans in US systems

9382 The action button on the Client Search was showing “DRS Trans” and not “A/R Trans” in US systems.

-Reported by Mike Francis

Client Financials Dashlet- Tooltip showing WIP locked up on drafts was missing
9101 In previous versions there used to be a tooltip when hovering over the WIP figure on the Client Financials dashlet that displayed the WIP tied up on drafts fees. This was added.
-Reported by Michelle Harris

Emailing RFP's needing a type in order to select the ClientCreditEmailAddress
9144 When emailing the RFP receipt, it was looking for the type of invoice, but a type for RFP isn't set, so it wasn't picking up the ClientCreditEmailAddress.
-Reported by Michelle Jenkins

Contact name still showing in the MRU menu once deleted from the summary of data page
8954 On successfully deleting a contact from the Contact summary of data page, the contact was still showing in the MRU menu.
-Reported by Victoria Stephenson

Edit Entry capability on all Transactions in DRS
9399 Under the DRS Trans on the client, users used to be able to edit the entries by right clicking and selecting edit entry for all entries. There wasn't meant to be any way to edit anything other than invoices and credit notes but the ability seemed to slip in in a previous version 8.4. There is no specific reason why we can't allow editing of other Trans types, so this has been enabled.
-Reported by Alex Priore on behalf of KSM (18351)

Client DRS Credit Note; Allocate option active even if that action is not possible
9370 From a client's DRS page and the Outstanding tab, when selecting a Credit note and clicking allocate, the following error message was being produced: "Sorry, could not create draft allocation. No entries to allocate against". Although that wasn't a bug, if there are no entries to allocate against then allocate shouldn't be one of the options listed in the actions drop down menu.
-Reported by Victoria Stephenson

Printing Staff Leave report displayed Exception error
9416 From the Staff Leave Usage Portfolio from the Portfolios menu, if a user selected a staff member with both leave entitlement left and some used holiday and clicked print, the following error message was produced: "Divide by Zero error encountered. The statement has been terminated". It was found that the system was using the data from the logged in user and not the staff user selected.
-Reported by Ricky Siu on behalf of both KSM and BMF (18213)

Able to make changes to past month's lodgements
9404 It was found that a user could make changes to past month's lodgements.
-Reported by Tony Doyle on behalf of Buzzacott (18063)

Fee from job takes you to previous client not current client
9397 From the Global Tax Management page, if a user selected a job, clicked to Open, followed by the fee button to create a fee on the job for the client, on filling in the Create bill for job dialog form and clicking Create Bill, the user was taken to a previous client, not the focused client.
-Reported by Alex Priore on behalf of Grimbleby Coleman (18075)

Emailing fee fails if no credit controller set on client
9377 If there was no credit controller set on a client, the emailing of fees was failing.
-Reported by Andrew Hambly

Batch Headers not marked as Complete when Posted

9373 When posting as DD/SO, the batch wasn't getting completed even though all the line entries were posted. On clicking post, the draft was posted, but when checking the header, it was showing as Active, and the user had to go back into the entry and cancel back out of it for the status to update.

-Reported by Michelle Jenkins on behalf of LB Group (18305)

Incorrect rounding up in receipts view

9117 If a claim with only one receipt was selected or added within the claim, when clicking the "New Line" allocation button the amounts were being changed on the allocation form. The receipt and the allocation were showing with different amounts, and the system had calculated the Tax amounts differently from one to the other.

-Reported by Tony Doyle on behalf of Milsted Langdon (17253)

Classic Approval; Grid totals not updating when timesheet deleted

9350 When deleting an existing entry on the timesheet entry screen, the totals in the grid were not being updated.

-Reported by Victoria Stephenson

Staff fees and Staff Receipts by Job access

9352 From the Job Ownership Portfolio dashlet on the staff dashboard, if the user didn't have access to StaffFees, StaffFeesServ and StaffFeesJob permissions, the page just loaded blank when the fees link was clicked. If they didn't have StaffReceipts, StaffReceiptsServ and StaffReceiptsJob permissions, the page just loaded blank when clicking the receipts link.

-Reported by Andrew Hambly

No "Unsaved" status when adding connections and ability to add them without a relationship type

9346 When going to a client's connections page and adding a new connection, there was no saved status showing in the header of the dialog as in previous versions which led to users not being aware that their changes would not be changed until they clicked the apply button. Users could also save a connection without a relationship type, so this was corrected.

-Reported by Victoria Stephenson and Michelle Harris

Relationship drop down issues when saving

9389 The relationship drop down was not showing the selected relationship and saving the relationship was not successful.

-Reported by Mike Francis

Cannot add/remove preference to/from contact in client or contact connections

9388 From either the client or contact connections tab from their all details pages, a user clicked on a contact marked as preferred and clicked on clear preferred button within the dialog and nothing happened. Also, when clicking on another contact and instead clicking on "Make Preferred", the dialog closed and the tick was removed from the contact who was originally marked as preferred, but that tick wasn't transferred to the newly preferred contact.

-Reported by Mike Francis

Preferred contact displayed on contacts who've not been marked as preferred

9387 From Client or Contact Connections pages, when user opened a contact not marked as preferred with a blue tick, on opening and viewing the details the preferred contact field was marked as "yes", even though that contact hadn't been marked as preferred.

-Reported by Mike Francis

Image Rotation Icons appearing when not useful
9376 When using the file component (e.g. in attributes) the rotate left/right did nothing despite the fact they were on show. Once saved, the full image wasn't available to the component - only the thumbnail, and it couldn't be rotated.
-Reported by Ryan Posener

Changing Job Status within time entry takes you to previous client, not current client
9362 When changing the status of a job within time entry from "in progress" to "complete", when you save the job, then click the link to go back to the client's job list, the system didn't take you to the current client's job list, but the previous client's job list- the last list of jobs that you had visited.
-Reported by Victoria Stephenson

Timesheet Grid; timer started from adding new entry and entry stays highlighted in blue
9360 If user started a timer within a new entry dialog the entry is highlighted blue, but stays blue.
-Reported by Victoria Stephenson

Copy Timesheet entry
9345 The highlighting functionality was lost when changing from VGrid to CGrid in timesheets. When a user copied an entry in timesheet view, the entry itself no longer flashed and faded, highlighting it to the user. This was functionality from previous versions using the VGrid.
-Reported by Michelle Harris

Timesheet Grid; Starting a timer when another is already running
9359 When starting a timer with an entry already running, the new entry was started and the original stopped, but the new entry didn't show the timer running in the grid. The user had to open the panel view and collapse it again, basically refreshing the grid manually when it should do that itself automatically.
-Reported by Victoria Stephenson

Import Disbursement Batch doesn't add the allocations from the Template
9498 On importing a disbursement batch, once completed, the allocations weren't displaying within the batch alongside the receipts. This was fixed.
Please Note: If the import detail has a quantity, it will be imported as a unit-based allocation, not a receipt allocation. Therefore, in the event that a Disbursement code cannot be found on the import spreadsheet, it will still import but will drop the Quantity details which will make it a normal receipt. This is as a result of a request to be able to select receipts on unit-based allocations, as the system previously used the presence of a receipt to differentiate between regular and unit-based allocations. As that is something we cannot do now, the Quantity is used instead, and any entry on the spreadsheet with a Quantity will be imported as a unit-based allocation.
-Reported by Victoria Stephenson

IE Browser; cannot add new entry or cancel out of new entry dialog
9421 In an IE browser, if a user added a new entry within timesheets from either My Timesheets > Entry or Timesheets > Others > Entry, the new entry dialog form did not load. None of the buttons displayed in the reduced dialog screen worked and therefore the user couldn't exit the dialog by using the cancel button, but had to refresh the page in order to close it.
-Reported by James Arthur

Timesheets Entries made through the Others tab using logged in user settings
9313 When creating a timesheet for another user through the Others tab, if the logged in user didn't have any charge bands set up, the entry dialog wouldn't display any charge bands. It

seemed that the Others tab was picking up the charge bands from the logged in user rather than the selected user. It was also showing Timesheet settings from the logged in user and not the focused user, as when logging in as a user with automatic posting on complete settings enabled, when entering time for a user that didn't have those settings and required approval instead, the timesheet entry was displaying Save and release buttons, and would post the timesheets instead of either saving them or completing the entries ready for approval.
-Reported by Michelle Harris and Victoria Stephenson

MODIFICATIONS - 9.6.(1)6842.22836

Job Bulk Update Change for Budget by Staff
9169 It was suggested that when replacing roles on staff, it would be useful to have Budgeted Staff included in the list for replacement. An extra checkbox named "On Job Budgets", was added to the Bulk Job Admin page, under Perform Action tab for the "Replace Staff" option. User should select the option to "Replace Staff", followed by ticking the box for "On Job Budgets".
-Suggested by Ryan Posener (Feature Req)

Job DueDate Auto-Recalc
9166 When changing due dates in the Jurisdiction area of PEWC, it was suggested that it would be useful to trigger the SP- pes_Jurisdiction_Recalculate for all of the outstanding jobs that have the Tax Type/Jurisdiction connected to it. A change was made, and now, after changing date calculations, all uncompleted jurisdictions that match should have the new date.
-Suggested by Andrew Hambly (Feature Req)

Add column for Template description to all Jobs Grids
9183 The column "Template Description" was added as a standard column to Job Grids.
-Suggested by Ryan Posener (Feature Req)

Add Column for Late to all Jobs Grids
9182 A standard column on all Jobs lists that have Tax jobs (Client, Staff and Global Tax) indicating if any Jurisdiction on the job is marked late, was requested. If you set a Jurisdiction as Late and Save it, the column "Late Filing" will say True instead of False.
-Suggested by Ryan Posener (Feature Req)

Permanent Toggle Width Pages
9008 It was requested that some pages within PE should be toggled wide as standard. These would be in Assurance, Prospects and Jobs lists, portfolios and management pages.
-Suggested by Brad Podzius

Add Office and Department to Assurance jobs set up
9185 When setting clients up in assurance, if users added jobs to the client, the default Office and Department set on those jobs were those set up on the Job Template itself. More options were added to the office and department drop downs in Job Template set up. For Office, there is an extra option "Use Client Office", for Department there are an extra two options "Use Service Department" and "Use Client Department".
-Suggested by Ryan Posener (Feature Req)

Change Automatic Budget checkbox when rolling Jobs
9050 It was requested that the budgets be carried forward when jobs were rolled, but they did not want the Budget based on Actual. The checkbox to select automatic budget was changed to a

drop down to allow the user to decide if they want to keep the existing budget on the rolled job or create a new budget based on actuals on the rolled job.
-Suggested by Michelle Harris (Feature Req)

Add task usage field to tblJob_Task
9003 A new 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 drop down has been added to the task details with the 2 options: "Cost Entry" and "Deadline Tracking". The Time and Expense SP's were changed to only return Cost Entry tasks.
-Suggested by Andrew Hambly on behalf of Buzzacott

Job Workflow Status Permissions
9172 The Workflow Status allowed users to set security groups which can see the status in the Job Workflow Status drop-down. Unfortunately, if a user was not in that security group, the status didn't show. If the user wasn't in the appropriate security group and couldn't see the workflow status, the status reverted to the first item in the list. To get around this, the workflow status drop-down will display all workflow statuses, but *only* the statuses that the logged in user has access to, will be active and available for the user to select and save to the job. These Workflow statuses can be set in Admin > Categories > Special Categories > Work Statuses > Statuses, and tick boxes are ticked beside the desired user groups.
It is worth noting here that when the Job Status is changed to In Progress, the system automatically sets the workflow status to the first one in order. If a user doesn't have access to that status it doesn't matter as it's not the user selecting the status, it's the system and the user can only change it from that to a status the user has permissions to.
-Suggested by Ryan Posener (Feature Req)

Add option for Rolling Jobs to omit Out Of Scope
9184 When rolling jobs and selecting Automatic Budgets, it was requested that an option be added to exclude Out Of Scope time from the following years Budget.
All options for rolling jobs are as follows: "Don't create a Budget", "Budget from Actual", "Budget from Actual (Omit Out of Scope)" and "Copy Budget".
-Suggested by Ryan Posener (Feature Req)

Make some Task Types unavailable for Time Entry
9181 A change was made to allow a type to be added to a task from the UI to prevent some tasks displaying for Time Entry. If a user enters and saves a timesheet entry using a task, on returning to the task details on the job on the client, the tick box to "Allow WIP" will be greyed out with a message to the user: "Task is unavailable for time entry. Time has been saved to this task, so it cannot be disabled". This is the only way that the Tick box becomes disabled in the UI.
Please Note: Two other options to disable the tick box include the following, which MUST be set in the tables for them to be active in the system: Task Budgeted in The Job and Task Scheduled in Staff Diary. These two options are ticked in the database and will not allow saving- providing a message that indicates if they are budgeted or scheduled using a check constraint. This therefore allows easy overriding/disabling of those checks if a user has reason to schedule or budget to them. For Example: Budget to "Fieldwork" as a Parent Task, but prevent time to be entered there.
-Suggested by Ryan Posener (Feature Req)

BUILD 9.6.(1)6913.28752

FIXES

Users unable to run period end

9656 Users were unable to run period end in their systems following an update in the new version of the Chrome browser.

-Reported by Tony Doyle

Upgrade tried to Insert Duplicate Charge Codes

9653 If you had a charge code with a code of CHG or NON and didn't have a record with a ChargeIndex less than 3 in tblTimeChargeCode then the upgrader threw an error.

-Reported by Dee Lowery

Updating Manger from Client details doesn't record who updated the details

9595 From a client's all details screen, if a user changed the manager and clicked apply, the date of the change was updated but not the person who updated it.

-Reported by Michelle Jenkins on behalf of HW Fisher (19569 & 19150)

Duplicate rates on line items in unit allocations grid in expenses

9448 When adding more than one unit-based allocation, as the allocations increased in number, so the rates in the rate field were also duplicated (bracketed rate amounts). Deleting them would not reduce the duplications.

-Reported by Tim Johnstone

Clicking save and allocate in expenses displayed an error message when saving

9367 In expense receipts, if a user added a receipt and filled in the details of the receipt and clicked save and allocate afterwards, the allocation page was loaded without fields for allocation showing. When adding the allocations then saving the changes, the following error message was displayed: "Cannot save – Allocation included that does not belong to this receipt".

-Reported by Victoria Stephenson

Error message in Prospects when "&" added to incumbent suppliers' field

9566 In Prospects under assurance, on opening a prospect on the opportunities tab, if a user entered "A&B" into the incumbent supplier's field, the following error message was displayed by the system: "The resource you're looking for has been removed, had its name changed, or is temporarily unavailable"

-Reported by Paul Chipperfield

A negative last line in a fee causing issues with Auto Allocating

9567 If the last summary line or the last Disbursement line in a fee was negative and the user used "add and auto allocate" to set the fee value, the negative line got updated to the last positive line's value if a rounding error occurred in the allocation.

-Reported by Adam Morgan

Schedule view not showing any staff

9491 When users navigated to the department schedule view (read only), and selected all offices, departments and grades, and ticked to see all rows, nothing was displayed.

-Reported by Andrew Hambly

Abandon Assurance Request Displays error message
9515 When doing a new request within assurance, once the page loaded, if the user clicked abandon, and error was produced: "DELETE failed because the following SET options have incorrect settings: 'ANSI_NULLS, QUOTED IDENTIFIER'……."
-Reported by Victoria Stephenson

Cannot save changes when adding Job Period Start and end dates
9481 When saving period start and end dates in a client's job, an error message was produced: "UPDATE failed because the following SET options have incorrect settings: 'ANSI_NULLS'……".
-Reported by Victoria Stephenson

Budget by Task by Role not displaying Budget Value
9496 On a client job with a Job Budget set "By Task by Role", the budget value was not pulled through to the grid.
-Reported by Victoria Stephenson

Prospects dashlet on a client gives error message when "Add Opportunity" clicked
9495 On a multiple engagement client, if the user clicked the Add Opportunity button the following error message was produced: "Sequence contains no elements".
-Reported by Tim Johnstone and Michelle Harris

Staff Index not updated
9476 The Staff Index wasn't being updated when saving provisions on client WIP page.
-Reported by Andrew Hambly

Automated Emails (Bulk Email) Placeholders for Dunning letters not working
9473 Placeholders for Dunning letters were not working, and the placeholders set in the system were not being transferred to the Email sent to the recipient.
-Reported by Tony Doyle on behalf of Price Bailey (17899)

Expense Approvers Permissions
9453 Manager expense list and Manager expense approval standard permissions were created to ensure that Expense approvers were able to both see and approve claims for staff they manage. Also, the permissions for Global, office and department expense list, when removed, with only the Manager Expense List permissions engaged, seemed to prevent the "Others" tab from appearing. This was fixed.
-Reported by Brad Podzius

Error message on creating a new assurance request
9419 On creating a new assurance request, the page would error and present a "2+2=5" error message.
-Reported by Mike Francis and Ricky Siu

Emailing of Invoices didn't recognise [CreditSalutation] Placeholder
9398 If a user sent an invoice from the Bulk Fee Printing page using the following placeholders: [ClientPartner], [CreditSalutation], only the [ClientPartner] was recognised.
-Reported by Tony Doyle on behalf of Blick Rothenburg (18451)

Duplicate check in assurance

9378 In assurance when adding a new contact or client, if a user entered a name that was repeated (example: Smith Smith, or Tango Tango), the duplicate check didn't recognise it, and a user could create multiple clients or contacts with the same name, so long as they were a name repeated.
-Reported by Victoria Stephenson

Missing permission to Client Zero Bill questionnaire from WIP Trans page

9369 From a client's WIP, when accessing the Zero Bills tab and selecting View questionnaire, an error message was produced: "Sorry, system permissions do not allow you access to this page (CliZBQuest)", However, no such permission was found in system administration. The permission now exists and takes you to the "questionnaires for Zero Bill on client ****"
-Reported by Victoria Stephenson

Cannot clear search dates from Staff Jobs page

9364 From the staff jobs page, if a user tried to clear the date field of any dates showing in order to see all jobs, the following error message was produced: "SqlDateTime Overflow. Must be between 1/1/1753 12:00:00 AM and 12/31/9999 11:59:59 PM".
-Reported by Victoria Stephenson

Prospects Issue

9390 It was found that the Prospect office and Job Codes when turned from prospect to client were not being copied to the client in assurance. It was also found that Winning a 2nd opportunity on a Prospect didn't populate Job Code, Job Office, Jurisdictions, Rates, Recurring Flag, Roles, Task, Budget Types and Questionnaires. The opportunity department on the Prospect was changed to be used for Client Department in assurance requests.
-Reported by Andrew Hambly on behalf of KSM

Fixing the TAB in Timesheet entry

9560 If a user used the TAB button whilst searching for a client in timesheets, the incorrect client was being selected by the system.
-Reported by Andrew Hambly

Print button not working

9530 Clicking on the Print button from Portfolio > Task Pad > Client Workflow was not working.
-Reported by Michelle Jenkins

Unable to save Primary Contact

9562 From either the contact or client details, other tab, when a user added a primary contact or changed the existing contact and clicked apply, the page reverted back to either blank or the previously displayed contact name.
-Reported by Tony Doyle

Timer in weekly and daily view covered by the hours field in the Others tab

9520 From timesheets entry, Others, the hours field was partially covered in both daily and weekly view. The issue was also that the timer should not be displayed in the Others tab, as you cannot set a timer for another user.
-Reported by Victoria Stephenson

Unable to save or edit connections in contact or client details pages

9577 From both the client and contact details pages it was found that when adding a new connection, on clicking apply after saving, the following error message was produced: "The underlying provider failed on Rollback". This prevented the connection from saving.

-Reported by Michelle Harris and Victoria Stephenson

Timesheet Suggestions error

9533 In weekly timesheet entry, if you tried to add a new entry but clicked cancel, and confirmed the check message that appeared to NOT keep the entry the following error was produced: "The request is Invalid"

-Reported by Victoria Stephenson

Making a contact Lost and saving the deactivated date

9477 from contact, Other tab, if the user made a contact inactive, the deactivated date didn't stick to the page when the user clicked apply. The user had to re-select the date and click the apply button again for the changes to be saved.

-Reported by Victoria Stephenson

Addition of email addresses on duplicate checks

9456 In Version 8 when doing a new client or contact through assurance and checking on duplicates, the newer versions weren't showing the email address. This has been changed in Version 9 to include the name, email, contact phone number and location.

-Reported by Michelle Jenkins and Tony Doyle on behalf of Buzzacott (18544)

Timesheet Headers not in front of timers and fields in panel view

9483 When in timesheet views and opening an entry in the grid to panel view, on scrolling down, fields were being hidden by the header and some fields would overlap the header itself. This was corrected.

-Reported by Victoria Stephenson

IE Browser not loading Assurance new contact/client form

9519 When user tried to add a new contact or client (Person or Org), within assurance the form didn't load.

-Reported by Victoria Stephenson

Entries posted through the billing process don't indicate they are posted on the expense claim

9312 If a user created a bill and added some unposted expense entries to it, then went to the expense claim view, the entries were showing as available to edit, but on saving they would get the following error message: "Cannot save allocations which are not active". It was decided that some indication on the expense entry that it cannot be edited similar to that found on timesheet entries, was required. Any entries posted through the billing process via the Add Unposted WIP option, should not be changeable within the Active claim and will show some indication that they have already been posted. This is apparent now as the entry will have no delete icon beside it and when opened to view, all fields are greyed out.

-Reported by Michelle Harris

Standalone Auth site login erroring when no staff record exists

9563 The standalone Auth site login was erroring if no staff record existed. The default SysAdmin password was changed.

-Reported by Michael Caltagirone

DRS instead of A/R displaying across PE in US sites

9526 It was found that in US site, A/R was being displayed as DRS instead. This was corrected.

-Reported by Michael Francis

Expenses: link from client dashboard takes you to random expense

9829 From the client dashboard and the client actions dashlet, when a user clicked on the expense link, the system opened up an active expense, the last/latest expense the user had worked on. This was corrected to take the user to the list of active expenses as before.

-Reported by Victoria Stephenson

Cannot run the print from My Dept Diary

9828 from the staff my department diary page, once selections had been made and your filtered results returned, if the user tried to print, a generic error message was produced.

-Reported by Victoria Stephenson

Staff Dashboard: Global Portfolio dashlet errors

9825 When adding the Global Portfolio Dashlet to the staff dashboard, the following error message was produced: "Null Object cannot be converted to a value type"

-Reported by Victoria Stephenson

Jobs templates: Roles set on template not being brought through to client job

9824 When creating a job from a template, the roles weren't being brought through correctly.

-Reported by Victoria Stephenson

ID error message when accessing client dashboard

9834 When a user navigated to the client dashboard an error message was displayed: "Id".

-Reported by Victoria Stephenson

Clicking on approval link from staff dashboard (IE)

9827 When a user clicked onto the Staff Approval page, the grid wasn't being loaded correctly.

-Reported by Victoria Stephenson

External Links button showing

9823 Whilst in jobs, it was found that the External Links button was showing even though it hadn't been set up on the system. It is a standard way of linking PE to external systems, but shouldn't show as standard, as when it does, it shows as a blank button and drop-down menu. This buttons presence was removed from systems that have not had the correct and proper set up for it.

-Reported by Victoria Stephenson

Client Details Year End Day not saving

9776 From the All Client Details page (Client tab), the day of the month drop down that forms part of the client year end was not reflecting the correct day in the table if the day was anything other than the first or last day of the month. For example, If you set the year end to be 15th August and click Apply, it updated the engagement table OK. If you then refreshed the client details page it would show the day as either the first or last day of August, not the 15th.

-Reported by Ben Edwards on behalf of Hillier Hopkins (20231)

Cannot save client details in IE browser

9790 On an IE browser, if the user made a change to the client details, the change was saved to the page initially, but if the user navigated away from the client details completely (i.e. the client dashboard) and returned again, the change was not saved.

-Reported by Tony Doyle on behalf of Hillier Hopkins (20231)

Timesheet extenders don't reset on new entries and cannot be switched between
9559 If you have an existing extender (say Claim extender, for example) saved on your timesheet, if you add another extender with the same details but a different extender duration, that will combine the two extender entries and the details you added in the second instance will OVERWRITE the initial one. So if you have two extenders the same, one saving the second, that will replace the existing one, so long as all the details are the same- same client and analysis etc. The extenders option was also removed from the PEWC area in PE.
-Reported by Andrew Hambly

Office Security
9386 When trying to view/add office access to staff, the page was taking a long time to load. This seemed to be due to it trying to load the entire contents of tblStaffOffices, even though none were being displayed.
-Reported by Adam Morgan on behalf of CBIZ

Timesheets Hours layout in CGrid
9452 From daily and weekly views in timesheets, on any day other than the current day, the hours weren't aligned with the rest of the grid details.
-Reported by David Kelso on behalf of CPA

Recurring fee generation restriction on open jobs
9268 If a user had two active jobs on a service, and drafted a recurring fee, two lines of WIP were produced- one for each service. If one of the jobs was closed, and the recurring fee drafted again, two lines were again showing. The Fee generation SP was amended to restrict it to Open Jobs.
-Reported by Tony Doyle and Andrew Hambly

MODIFICATIONS – 9.6.(1)6913.28752

Speed up Client WIP by Job SP
9580 The client WIP by job SP was changed to reduce the number of joins to tblTranWIP, increasing the speed at which it runs.
-Suggested by Tim Johnstone

Ownership Portfolio Dashlets Behaviour
8679 When accessing either Receipts PTD or Fees PTD from either the Services, Jobs or Clients Ownership Portfolio Dashlets from the Staff Dashboard, when clicking upon the listed entries, they would only take the user to the client's dashboard and only offered more information on the transaction by using the actions drop down. This was changed to allow users to click on the line entry and view details of the transaction from within that grid.
-Suggested by Mike Francis

Update Staff Charge Rates Page
9494 If a user changes a Staff Member's settings to Post on Complete from having to Approve, the SP that runs should check for the number of Outstanding Timesheets with a status of Complete, and mark those as Posted once the setting change has taken place. A check message will also appear informing the user of the changes they are about to make and that complete timesheets will be posted.
-Suggested by Andrew Hambly and Victoria Stephenson

Prospect event not appearing on My Events list
9420 A request was made to display any Event a user adds, regardless if the user assigned it to themselves, or saved a Favourite.
-Reported by Dee Lowrey and Andrew Hambly

Remove Views option from permissions in PEWC
9407 The Views link in Categories, Permissions was removed as it is no longer in use in Version 9.
-Suggested by Michelle Harris

Invoice sending issue
9400 If within client details on the DRS tab, the setting for how invoices get sent out is not set to email but set to print and mail, and there's no email address saved to the client, when printed in bulk, invoices were printed and not emailed as the email address was missing. If email is not selected in the client's details pages, then the option to email will not be presented by the system at the end of the fee wizard on confirmation.
-Reported by Dee Lowery

Update Partner/Manager when new current Partner/Manager added to the staffing page
8266 The Client staffing page allowed engagement partner and manager to be set by clicking onto the partner or manager buttons, in turn flowing through to the client's details page. It was requested that we do away with having to click onto the partner/manager button and if the staff member selected is selected as current then that updates the client details page when the relationship is set as engagement partner/manager.
-Suggested by Michelle Harris

Allow Impersonation when using Windows Auth
9561 A change was made to allow impersonation login when using Windows Auth.
-Reported by Andrew Hambly

Allow Mobile Timesheet to edit any date
9447 It was made possible to display and enter time for a day other than today from the mobile timesheet view.
-Suggested by Ellis Birt

Logon failure confirming a valid user account was used
9474 When logging in with an invalid account, the error message is different to the message displayed if logging in with a valid account and an invalid password. The logon was changed to fail Authentication with a generic message not indicating whether it was the user name or password that was invalid, in order to increase security.
-Reported by Ellis Birt

Staff Replace page for Clients
9143 The Update Partner/Manager page in Admin has been edited. A user can now search for a person to replace by entering a person to replace with and using an extended staff search, and selecting the items they wish to replace the staff on. They then go to the replace staff tab and search for a staff member to replace them with, and select between Client Partner, Service Partner, Job Partner, Client manager, Service Manager, Job Manager, Service in Charge and Job in Charge, and click the replace staff button. Users can use the Red Erase icon top right to clear the selected items from the list in the Replace Staff page if they have made a mistake and wish to create a new list of replacements from the Search for replacements tab.
-Suggested by Andrew Hambly

Bulk change for templates (template reapply on roll and new bulk action)
9171 It was requested that a way to bulk change templates including tax return type on a job was implemented. This change was implemented to happen at the point of rolling over a job but also a bulk action to do it for many jobs at once from the Bulk Job Admin screen from a drop down in the perform action tab. In the case of the bulk job template update, the need to ensure there are no transactions on the job to avoid errors when trying to replace tasks was also requested.
-Suggested by Andrew Hambly on behalf of PBMares

BUILD 9.6.(1)6976.26371

*Henceforth, new releases of Practice Engine will **not** be tested on an IE browser.*
This decision has been made by management in relation to Microsoft themselves dropping support for the IE browser back in 2014.
Hereon in, the browsers we recommend users to run Practice Engine on are Chrome, Edge and Firefox.
*As such please be aware that this release of Practice Engine has NOT been through rigorous testing on an **IE browser**, and we cannot guarantee all functions will perform as expected if you run Practice Engine software on an IE browser instead of the recommended Chrome, Edge or Firefox browsers.*

FIXES

Job listing SP's failing if searching with template or late filing selection
10095 The late filing column was on displaying true if there was a late filing that hadn't been completed, and whenever searching within the Global jobs listing pages, it errored as the newly added columns were not defined at the time where the clause was attached.
-Reported by Ricky Siu

Timesheet suggestions sometimes failed with a datetime conversion error
10093 Users reported receiving an error stating "The conversion of a date data type to a datetime data type resulted in an out-of-range value. The statement has been terminated", when clicking on the suggestions/favourites option within a timesheet.
-Reported by Melissa Seehorn

RD Cheques listing the same entry multiple times if it's been allocated to multiple lines
10092 If a user had a receipt allocated to multiple invoices and tried to do an RD cheque, the receipt listed multiple times.
-Reported by Michelle Jenkins

GDPR Export not listing clients
10091 If a user exported the GDPR data for a contact with clients, the exported data didn't list the clients.
-Reported by Tony Doyle

Staff Rates Portfolio didn't show staff with no rate
10090 If a new staff member had no rates added they didn't appear on the rates listing, so users wouldn't see that they had no rate applied.
-Reported by Dee Lowrey

You can't Bulk forward jobs without selecting a role
10088 When bulk forwarding jobs and not selecting a role, nothing would happen.
-Reported by Brad Podzius

Removal of billing client in Chrome and Edge browsers not saved

9756 From a client's DRS Collection tab, is a user removed the billing client and clicked apply, nothing happened and the changes weren't saved.

-Reported by Victoria Stephenson

Connection details from contact and client

9579 When users added a contact on the contact or client connections page in contact or client details, the pages were using sticky tabs. If the last page you visited was the relationships tab, when adding a connection on another contact or client the page would load the relationships tab and the user couldn't click on the contact tab to check the details, as nothing would happen. The ability to make a contact preferred without having to save it beforehand, was added. A fix was also applied to prevent inactive contacts preferred, along with making an Organisation a preferred contact for another Organisation.

-Reported by Michelle Harris

Dates field in WIP on a client

9840 When in the WIP pages on a client, if a user typed a date into the date filter fields and pressed TAB and print, the date in the first field was incorrect and the report hadn't recognised the changed date.

-Reported by Tim Johnstone and Michelle Jenkins (BDO and Hillier Hopkins: 20412/20619/20851)

Classic Approval page not honouring departmental permissions

9763 Within Timesheets and classic approval, if a user did not have permissions to a department they could still see all departments in the department drop down on the classic approval page.

-Reported by Tony Doyle on behalf of Pearson May (20195)

Prospects Dashlet said Opportunities instead of Prospects as it did in the menu

9715 On a client's Dashboard, when selecting dashlets, if the user selected "Prospects", the resulting dashlet's Header/title would instead be "Opportunities". This was changed to say "Opportunities" in both the menu and on the dashlet.

-Reported by Victoria Stephenson

Fees not clearing from Bulk Fee Print when confirmed

9629 When printing fees from the Bulk fee list, they were not being cleared after being sent. The message box appeared saying "did the bulk fees print correctly", but the system was not updating the relevant table to say that the fees had been printed if the user selected "OK".

-Reported by Tony Doyle on behalf of Price Bailey (19645)

Connection type not using the Officer or Provider set up

9614 When adding a new connection onto a contact or client the list that is provided in the relationship type should be showing the correct list based on the Type e.g. Officers or Providers, but in the new connection editor, providers were being displayed in the Officers list and Vice versa.

-Reported by Michelle Harris

Showing "submitted by" on questionnaires not yet submitted

9609 From a client's job with two questionnaires showing as created, if the user opened up a job, filled it in, saved it and submitted the questionnaire, when going back to the job and opening up the questionnaire tab, the one questionnaire has a status of created and the other questionnaire a status of submitted, but BOTH of them have a "Submitted by" of the logged in user.

-Reported by Melissa Seehorn on behalf of Muellor Prost (19515)

Error message produced when source contact entered not existent in DB
9607 From Prospects and the Business tab of a Prospect, when a user entered the name in the source contact field that was non-existent in the database and clicked save, a large error message was produced.
-Reported by Melissa Seehorn on behalf of Deloitte (19218)

Changes made to the list of unposted entries available
9654 Changes were made to the list of unposted entries available for posting within a bill/fee to exclude timesheet entries with a running timer.
-Reported by Andrew Hambly on behalf of Fisher and Co.

Inactive Departments displayed for selection in Job Details screen
9974 In categories, if a department was inactive, when on the clients Job details screen, the inactive departments were being listed in the departments drop down for selection by the user.
-Reported by Michelle Jenkins on behalf of Larking Gowen (20880)

Emailing Fees and Statements
9845 The system seemed to be using the Print layout when sending out Emails, not the Email layout added within PEWC.
-Reported by David Kelso

Locked clients appearing in Timesheet entry
9531 It was found that a user could enter a timesheet entry from the locked client's dashboard through the "enter a timesheet" button on the client's dashlet after having a change made to their system on Locked Clients. A change was made to ensure no time could be added to a locked client.
-Reported by Michelle Jenkins on behalf of Larking Gowen (15896)

Deletion of a Job Template produced error message
9578 In the Job templates page, if a template was deleted, an "ANSI_NULLS.QUOTED_IDENTIFIER" error message was produced.
-Reported by Tony Doyle

Typo in Grid column list Dialog Box
9728 On any grid when clicking the "Columns" button and clicking the "Adjust Column Width" button, the word "bigger" had been mis-typed.
-Reported by David Kelso

Timesheet workflow dialog not showing work status if Job Not Started
9740 If a job wasn't started on a client, and the user went to the New Entry dialog in Timesheet entry, the Workflow dialog did not display the Work Status.
-Reported by Andrew Hambly

Rejected Timesheets error when activate all clicked
9841 From timesheet entry on the rejected timesheets page, if the user clicked the actions cog top right, and selected "activate all", a "SqlDateTime Overflow" error message was produced.
-Reported by Tim Johnstone

Couldn't press Enter key when filtering in the simple client search
9839 If a user typed in a client code and pressed the enter key on their keyboard, the search criteria was cleared from the search box and the page refreshed.
-Reported by Tim Johnstone and Michelle Jenkins on behalf of BDO (20412)

Job Rollover not recalculating Tax Job Due Dates

9813 When rolling over jobs, the system wasn't correctly calculating the Tax job due dates. They would need to be recalculated to be for the following year.
-Reported by Ricky Siu

New PELert Scheduled Task has 0 ID

9844 When adding a new PELert and then looking at the scheduled task that was created to run it, the Task data displayed an alert index of 0.
-Reported by Andrew Hambly

Windows Auth button still displayed even when Windows Auth is disabled

9836 The Auth site was showing the Windows login button even if it had been turned off in the Config.
-Reported by Tim Johnstone

Error message produced on Approval when Job Template attached to more than one service

9835 In a new assurance request within the engagement section, if the user added 3-4 services and added jobs with a different service but the same job template and submitted and approved the request and questionnaires, in gatekeeping, an error message was produced on clicking approve: "Cannot insert duplicate key row in object 'dbo.tblJob_Header' with unique index 'UniqueCodePerClientExceptNulls'…"
-Reported by Ben Edwards

New Audit system failing on ClientServicelevel

9640 If a user selected ClientServiceLevel in the new Audit Changes option in PEWC, it actually selected ClientShortCode. This was corrected.
-Reported by Tony Doyle

Attachment removal and save in Collection Details produced error message

9981 From Client DRS on the dashboard from the actions drop down, if a user selected the collection details option, added an attachment, saved it, removed the attachment, saved that change, then went back to the original and tried to open the collection details, a "Sequence contains no elements" error message was produced.
-Reported by Melissa Seehorn

Could remove client name and codes and save from within client details

9939 From a client's details pages, if a user removed the client name, code and short name and clicked apply, the changes were saved. The user could then go to the client search, and the client still existed but without a client code or name.
-Reported by Tony Doyle on behalf of Thomas Westcott (20719)

Job status update from Bulk Job Admin

9680 When batch updating workflow statuses the job status was being set to "not started" on "In Progress" jobs rather than being left alone, if the user had chosen "No Change" as the "update status".
-Reported by Alex Priore on behalf of Larsson Gross (19216)

Custom Job Portfolio Page Menu messing with new pages om Upgrade

9703 On the Staff Taskpad (if set up) there is a custom portfolio page. Changes were made to how the new page menu record was numbered in the database
-Reported by Andrew Hambly

Partner/Manager Update
9647 When changing the Partner for a client, the Partner is also updated for "Active" services and Jobs, but when you change the Manager or in Charge on a client, they are updated for "all" services and Jobs. A change was made to have it work the same way as the Partner when changed.
-Reported by Ricky Siu

Attribute values on Contact Attributes not being applied to the contact attributes within details
9379 If a user created a contact with attributes, when approved, the attributes were not showing on the client and or contact details pages.
-Reported by Michelle Harris

When new mileage rate added, rate changed on posted expenses
9980 If a user added a new expense claim and dated it in a previous month and added only a mileage expense and posted it, if a new mileage rate was added in PEWC, the rate on the posted expense would be changed to the newly added rate, even though the expense was posted and dated for a previous month, not the date that the newly added rate was set to.
-Reported by Melissa Seehorn on behalf of BMF

MODIFICATIONS – 9.6.(1)6976.26371

Client Actions Dashlet saying Lost instead of Suspended
9725 When changing the status of a client to 'Suspended', in the client actions dashlet it said "This is a LOST client'. This was changed to show "Suspended" instead.
-Suggested by Victor Timotin on behalf of Hillier Hopkins (20042)

Partner/Manager labelling in WIP Provisions
9992 From the Portfolio WIP Provisions, if the names for the Partner/Manager drop down were changed then the filtering on the page didn't work as the page was coded to look for the names "Partner" or "Manager" on the page. A change was made to stop using the item name and instead use the Index.
-Reported by Melissa Seehorn on behalf of MPBCPA (19402)

BUILD 9.6.(1)6998.29269

FIXES

Removing access to "Late" status on Tax Job changes due date status
10185 From the staff menu and the Global Tax job Management, if a user found a job with a current due date and opened the jurisdiction tab and changed the status from not started to late, the due date was updated to the same date. But if access to the late status was removed from within PEWC, when returning to the job, the status was changed to not started and the due date changed.
-Reported by Melissa Seehorn on behalf of GRKB (21034)

Unposted Disbursements: Able to confirm duplicate fees
10183 If a user added a disbursement, then created a fee on a client, using the option to "Add unposted WIP", selecting the Disbursement entry they just created, and confirmed the fee, users were finding that if they went back to the disbursement and posted it, it would show up in WIP and they were able to bill the same entry again and again. This would duplicate posting.

-Reported by Melissa Seehorn on behalf of Hogan Taylor (21403)

IndexedDB
9405 Users seemed to be coming across a failure in the running browser tests on the log on screen for PE for the IndexedDB.
-Reported by Tony Doyle on behalf of Buzzacott (17977)

MODIFICATIONS - 9.6.(1)6998.29269

Job Tasks permissions to control edit button
10150 A request was put forward to control the edit button on timesheet entry for service/job and task. It was requested that the ability to add/delete jobs and tasks on the timesheet page be restricted. The JobTasks Permission controls Tasks panel in Job Details and the ClientJobDets Permission controls access to Edit button Job drop down on Timesheets.
If a user has ClientJobDets but NOT JobTasks then they can view the job details (Open a job), but cannot edit any information within it unless you have given them the specific Tabbed page permission (For example JobBudgets). They also cannot edit the Tasks and service/Jobs in Timesheet view.
If a User has Just JobTasks and NOT ClientJobDets They have no option to open a Job at all from the Client's Job page- they can see only a list of jobs in the grid. They also cannot edit Tasks and service/Jobs in Timesheet view.
You would need a combination of access to BOTH of these permissions to gain access to the job details from the client and access to the Edit functions from within a timesheet entry.
-Suggested by Melissa Seehorn on behalf of Singer Lewak

BUILD 9.6.(1)7090.17263

FIXES

Budget by Task in Total- Error when deleting Task
10178 If a user went to a job on a client, ensuring that the tasks tab had Tasks showing on it, then accessed the Budget tab and changed the Budget Type to be "By Task In Total" and saved, when browsing back to the Task tab, and trying to delete one of the Tasks with no WIP or budget attached to it, an error message was produced: "The DELETE statement conflicted with the REFERENCE constraint "FK_Job_Budgets_TaskLink". The conflict occurred in Database……"
-Reported by Melissa Seehorn on behalf of Muellor Prost and Hogan Taylor (21437 & 21492)

Time entry from Job when Suspended clients setting is Active
10163 If the Lock Suspended clients setting was active in PEWC, it was found that you could still go to a suspended client and start a timer from within a job, by using the Time Entry button within the jobs view.
-Reported by Victoria Stephenson

Unticking a service on a job template removed the template from the list
10072 From the Job Templates definition page in Admin, if a user unticked access to a service on one of the templates and left the service as active, when the page was refreshed the template was gone from the list.
-Reported by Tim Johnstone on behalf of Buzzacott

Cannot save short code changes on contacts who are Organisations
10046 From the contact search, and accessing a contacts details (a contact who is an Organisation), if the user tried to change the sort code, clicking save to apply their changes, the system wasn't correctly applying the change to the page.
-Reported by Melissa Seehorn on behalf of CBIZ, GRKB and G.Coleman (20666, 20873, 20968)

Transfer WIP within or TO another client
10043 If users browsed to clients with WIP, and went to Client – Task Pad – either Transfer WIP to another client OR Transfer WIP within Client, then clicked the Next button. Once a checkbox beside a staff members name is selected, on expanding the name to view all of the transactions for the staff member and manually unchecking a couple of transactions and clicking Next, users received a message stating "No Lines Selected for Transfer." So, it somehow removed all checked items when only unchecking a few items. This was happening for both Transfer WIP to another client and transfer WIP within Client.
-Reported by Melissa Seehorn

Error message on client details if not contact office added within assurance
9864 If an assurance request was created and the contact Office left blank, once the engagement was made and the contact turned into a client having added an office to the client engagement page, it was found that no Office was showing in the client details in either the Others tab or the client tab. On the client tab there was also an error message showing "This code is already in use, please try another", even though there was a code on the client.
-Reported by Ricky Siu on behalf of Larson Gross

Unposted WIP to a draft fee
9863 It was found there was a bug with adding unposted WIP to a draft fee if the client included in the bill only had Unposted WIP.
-Reported by Andrew Hambly

Letters Dashlet causes error on client dashboard
9698 From a client dashboard, if a user added the letters dashlet, an error message was produced and the dashlet not loaded to the screen.
-Reported by Victoria Stephenson

Assurance Client Code Field
9631 It was found you could remove the Assurance Client Code field. The problem was that the "default" client that was created on the client side had a client code of NULL.
-Reported by Tony Doyle and Andrew Hambly

Firefox-Printing WIP reports doesn't use the date chosen by the user
10180 From a client's WIP pages, if a user selected an entry clicked to view posted, and accessed the print tab changing the "from" date and then clicking print, the report didn't use the selected dates.
-Reported by Victoria Stephenson

Note Categorisation - Deleting note when job is closed not working unless job is rolled
10182 When creating a note on a job and setting the option to delete the note when the job is closed, and then closing the job, it was found that the note still remained.
-Reported by Michelle Harris

Assurance: Questionnaires not being created on new jobs added from assurance

10326 Questionnaires weren't being loaded to jobs immediately once a client was created through assurance. The user had to make a change to the job details, and then browse back to the questionnaires tab for the questionnaires to appear.

-Reported by Melissa Seehorn on behalf of Muellor Prost (21466)

Report Macro Set Up

10293 A bug was found in the report macro set up where you could pick reports that didn't appear on the regular report menu because they had been set to only work for specific staff, client or contacts.

-Reported by Andrew Hambly

Assurance- Attribute values on Contact attributes

9379 Attribute values on Contact attributes weren't being applied to the Contact Attributes within the Client and Contact Details.

-Reported by Michelle Harris

Classic Approval-Posted timesheets in prior month produces error for first week of next month

10287 If users were using Classic Approval in the timesheets and it was the first week of the month and all timesheets in the system for prior months were POSTED then they received a "Sequence Contains no Elements" error.

-Reported by Michelle Jenkins

Jobs- JobDelete Permissions not being Honoured

10233 It was found that if a user had no access to the JobDelete permission, the JobDelete button was still displayed as active. They could click upon it and the job was deleted.

-Reported by Victoria Stephenson

Unable to delete expenses codes from categories

10325 Users were getting an error message when deleting expense codes in PEWC: "Procedure or function 'pe6_ChargeCodes_Delete' expects parameter '@ChargeExtender', which was not supplied.

-Reported by Tony Doyle on behalf of Buzzacott (21910)

No date added to actual finish date on dates panel when job marked as completed

10068 If users browsed to an active job in a jobs list, updated the status to Complete, browsed to the Job Dates panel for that job, then today's date should have populated under the End column for an Actual date (Actual finish). Nothing was populating as it should.

-Reported by Melissa Seehorn on behalf of Grimbleby Coleman (20930)

Removal of ClientClientEdit permissions provides error message when saving other details on screen

9639 In system admin and removing the ClientClientEdit permissions, if the user then went to the Client's All Details page – Other tab, and tried to make changes to any of the fields on the right side of the page and clicked the Apply button to save their changes, they received an error message: "The underlying provider failed on rollback".

-Reported by Victoria Stephenson

Error message displayed when ClientClientEdit permission removed and clicking Apply

9638 This was similar to the above bug. If the ClientClientEdit permissions was removed and saved, users found that they were unable to add new addresses to the "Other" tab under the client details page. The error message was produced when clicking the Apply button for the whole page, to

ensure that the new address was saved to the page, but instead users received the following error message: “The underlying Provider failed on Rollback”
-Reported by Victoria Stephenson

Deleting users from Standalone Admin App
10279 The User in webpages_0AuthMembership was not being cleaned up when a user was deleted from the Standalone Admin App.
-Reported by Michael Caltagirone

Possible duplicates when Posting Timesheets
10279 A client had managed to post timesheets twice as a result of the new database snapshot isolation level, so bulk posting routines needed to be updated to a stricter isolation level. A change was added to the top of some time and expense SP’s to help with this.
-Reported by Tim Johnstone

Clicking cancel on dialog when cancelling save and release
10503 With save and release settings enabled, if a user wen tot timesheet entry and in the dialog added an hour of time and clicked save and release, the check message would appear to the user. If you clicked cancel, and instead clicked the save button on the entry, the saved entry displayed double the time in the grid.
-Reported by Melissa Seehorn on behalf of CBIZ (22848)

Dates not recognised when printing DRS reports in EDGE or Firefox browsers
10177 From the client DRS print tab, if the dates were changed using the date picker or typing manually in the edge or Firefox browsers, the dates weren’t being recognised by the report and the full report would be loaded.
-Reported by Victoria Stephenson

Error message produced when request new engagement clicked from contact details
10117 An error message was appearing when users clicked the “request a new engagement” button from a contact. The Error was: “Violation of PRIMARY KEY Constraint ‘PK_tblVEngagement’. Cannot Insert duplicate key in Object ‘dbo.tblVEngagement’….”
-Reported by Paul Chipperfield

Typing dates manually on Jobs in assurance not working
9866 From the assurance engagements tab, Jobs refiner, if the start and end dates were changed by typing and not using the date picker, the Fiscal and Form year were not changed to the same years that the user typed in the start and end fields. When save was clicked, the changes were not saved and the dates instead reverted to the default year (current year).
-Reported by Ricky Siu on behalf of Larsson Gross

MODIFICATIONS – 9.6.(1)7090.17263

Job Workflow Improvements
9985 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.
-Suggested by Andrew Hambly

BUILD 9.6.(1)7122.41244

FIXES

Emailing Invoices
10484 When emailing invoices from the AR (DRS) page, the PDF was named “fee” instead of Client Code/Client name/Invoice number/Date, as it is when a fee is emailed during the confirmation process.
-Reported by Brad Podzius

Euros figures not shown in Print grid from Portfolio
10483 In previous versions of 9.6 when an Irish client looked at a portfolio page, they could view all figures in Euros. If the user clicked Print Grid however, the report that appeared was displayed in GBP because the Chrome browser didn’t have English (Irish) as a language.
-Reported by James Arthur on behalf of McInerney Saunders (22447)

Unit Allocations being added partly filled in but nothing appeared on screen
10473 If a user added a unit allocation with some details missing (such as rate), then clicked the “add” button, the dialog closed and no unit allocation was added to the unit allocations grid. If the user then added receipts and allocations in an attempt to submit the claim, nothing would happen and the page was instead refreshed instead of the claim submitted.
-Reported by Tony Doyle on behalf of Mazars (22500)

Broken Page when selecting Billing Guide from Service Ownership Portfolio
10448 From the staff dashboard, using the “Service Ownership Portfolio”, if a user clicked on the square next to the WIP Figure and changed the view to be by service manager and the type to be billing guide and then clicked the refresh button, the page would be loaded as broken.
-Reported by Michelle Jenkins on behalf of McInerney Saunders (22433)

Timesheet Favourites: Could add favourites with a closed job to timesheets
10388 It was found that a “favourite” timesheet entry could be added even though the job itself was closed.
-Reported by Alex Priore on behalf of Blum Shapiro (22243)

Bulk Job Update replaced Custom rates on Jobs, not just roles as selected
10386 When using the Bulk Job update to add roles to existing jobs, the system instead cleared the custom rates and applied Standard rates.
-Reported by Andrew Hambly on behalf of CBIZ

Data and Filtered Data options not working on a grid that was sorted
10373 It was found that when sorting the Staff Name and Staff Department columns in the timesheet - Others grid, that when choosing either Data or Filtered data options from the column drop down menu, no CSV file or Excel spreadsheet was produced.
-Reported by Brad Podzius

Posting Timesheets and Disbursements not populating WIPStaffSubDept
10371 When either timesheets or disbursements were posted, the WIPStaffSubDept column in tblTranWIP wasn’t being populated.
-Reported by Tony Doyle on behalf of Larking Gowen (22327)

Email Address set in EMLINVFRM not being referenced when emailing via the Client DRS
10367 If users had an email address set in the system option EMLINVFRM, when emailing via the individual clients DRS screen, the set email address wasn't being picked up.
-Reported by Michelle Jenkins on behalf of Price Bailey (21899)

Adding a line in Recurring Fees setting DebtDetJob to 0
10356 When clients put an attached line on a recurring fee to add extra narrative, the field 'DebtDetJob' on tblTran_FeeRecur_Detail was set to '0' instead of '-1', which led to WIP Transactions with a ServPeriod of '0'.
-Reported by Tony Doyle on behalf of Buzzacott (22172)

Refresh in Main Portfolio Summary not working correctly
10337 From the Main Portfolio page in Portfolios with the paging turned off, if users selected from the details drop down "Aged WIP" and clicked refresh they would see a full list of partners and the Aged WIP. If they clicked on a partner's name in the grid, then clicked staff and staff dashboard and accessed the Ownership portfolio dashlet, they could click on the page icon beside the WIP figure to view the partners Aged WIP. If the user then clicked refresh the page didn't do so, and if they changed the drop-down details to something else and refreshed again but nothing happened. The full list of partners and Aged WIP could not be re-loaded.
-Reported by Tony Doyle on behalf of McInerney Saunders (22095)

Target hours incorrect if a split week and headers for the following week had not been created
10234 For timesheets spanning a month end, the target hours were calculated incorrectly if that first week of the new period had not been created also. Users were finding that if they chose a split month where the timesheets for the following month hadn't been created, when checking the target hours, they were calculated incorrectly.
-Reported by Michelle Harris

PDF'S failing to load
10133 Users were finding that they couldn't print invoices because there was no master version loaded, which presented an issue when clients had no client version of their own for the system to use. The system would try to call the master version but one didn't exist.
-Reported by James Arthur on behalf of Buzzacott and Blick Rothenburg

Claim date displayed at the bottom of the field (EDGE)
9517 The claim date within an expense claim was displayed at the bottom of the claim date field in the Edge browser. This was fixed and made to be in the centre of the field.
-Reported by Victoria Stephenson

Firefox- couldn't right click to select current period
10179 Within a Firefox browser, if a user went to Admin and periods, and tried to right click on a current period to select an option from the mini menu, this was being covered by a mini browser menu instead, effectively blocking the user from the options menu.
-Reported by Victoria Stephenson

Firefox- Click print statements not opening a new tab to run DRS report
10181 On a client if you clicked the DRS transactions figure and clicked on the print tab and clicked print under the statements, the resulting report wasn't loaded in another tab. It instead stayed on the current tab, but no check message was provided to check that the report printed correctly as users would expect in other browsers.
-Reported by Victoria Stephenson

Client DRS permission not working

10610 It was found that the ClientDRSEdit permission wasn't working correctly. This permission was to handle the collection details on the actual transactions themselves in the Client DRS pages, not the Collection details in the client details screens, which is handled by the ClientDRSCollectionEdit permission.
-Reported by Melissa Seehorn on behalf of Withum (23550)

Rolling jobs with no options ticked for copy from template

10377 When in jobs, if users rolled the jobs and left ALL options for template copying when rolling UNTICKED, once rolled, the new job seemed to pick up the rates and complexity level from the template and not the original rolled job.
-Reported by Brad Podzius on behalf of Clearview

Ability to delete attributes not available in contact attributes as it was in 9.2

10357 In previous versions, there were 2 red "X"'s showing in the contact attributes pages. One to remove the attachment, and one to remove the attribute- clear the whole attribute. The second red "X" was missing, and causing issues for clients.
-Reported by Larry Barge on behalf of Olsen Thielen (21785)

MODIFICATIONS 9.6.(1)7122.41244

Change all date picker bindings to type="text" from type="date"

10535 Any place within the system that used the native browser date picker was switched to use our custom date picker. Previously there was a combination of the two but this was unnecessary, so all date pickers have now been standardised to use our custom one.
-Suggested by Mike Caltagirone

Switch to using new STRING_SPLIT function for performance

10590 Current SplitString and StringSplit UDF calls were replaced with calls to the new built in STRING_SPLIT function.
-Suggested by Tim Johnstone

Job WIP Summary to allow view by Staff, Role and Task whilst displaying hours

10622 The Job WIP Summary panel currently shows figures based on how the budgets are entered but it was suggested that it would be helpful to be able to switch that to see the figures by Staff, Role or Task. A "total input hours" was added also, along with a "Back To" link on the job WIP transactions view, making it easier to get back to the job if you clicked the WIP link from the job.
-Suggested by Michael Francis

BUILD 9.6.(1)7166.27130

FIXES

Chargeable percentage calculating from un-chargeable entries

10242 The chargeable percentage on timesheet entry was calculating percentages from non-chargeable entries in timesheets.
-Reported by Michelle Jenkins on behalf of BDO (21117)

Timescale permission not being honoured
10704 If the timescale permission had been removed from within security administration, when entering the client and job on a timesheet, the rate (charge band) field was still active. If Timescale permission has been removed the field should be greyed out.
-Reported by Brad Podzius

Allocate option in client DRS screen displayed when nothing to allocate against
10702 It was found that the allocate option in the actions drop down in a client's DRS pages was still displayed when there was nothing for it to be allocated against. This was removed previously, so that users didn't encounter an error message when trying to allocate an entry with nothing to allocate it against.
-Reported by Tony Doyle on behalf of Hays MacIntyre (24016)

Mark/Clear preferred behaviour in contact connections
10699 From a contacts all contacts details and on the connection tab, when clicking on the connection itself (staff, provider etc), you could click to Make preferred/Clear Preferred, but although the apply button on the page behind the open connections dialog screen was activated, the user first had to click the cancel button in order to close the dialog screen and click apply to save the changes. It was also pointed out that the preferred contact field within the connection dialog was not updated when clicking the "make/clear preferred" button until users cancelled out of the dialog and clicked the apply button on the screen behind. Both of these items were changed to improve the user experience.
-Reported by Tony Doyle on behalf of Hays MacIntyre (23978)

Restore WIP tick box on non WIP credit note confirmation
10684 When creating a credit note on a client and unticking the "Use WIP" tick box, on confirmation, the restore WIP tick box is automatically ticked, which was causing issues for users, as they would unknowingly confirm the credit note with this option ticked, but then find when trying to unallocate the note an error message displayed informing them that the credit note couldn't be unallocated as the WIP had been restored, even though the user had created a non-WIP credit note. This was corrected. If a user is doing a non-WIP credit note, the restore WIP button shouldn't automatically be ticked on the confirmation dialog screen.
-Reported by Michelle Jenkins on behalf of Blick Rothenburg (23716)

Inactive Clients/Contacts and Organisations for Organisations
10589 It was found that users could make an organisation a preferred contact for another organisation, and that they could also make an inactive contact the preferred connection.
-Reported by Ricky Siu

Closed weeks not being honoured
10536 When two headers are present in a week (the end of one month and the beginning of another), and a user entered all their targeted time for the first part of the week and closed that first part of the week from the timesheet admin page, users found they could still enter time for that part of the week and that the first few days were still shown as active instead of closed in the new entry dialog screen allowing time entry where there shouldn't be.
-Reported by Melissa Seehorn on behalf of Olsen Thielen

Billing folder not expanding in Fee Portfolio in Chrome
10361 From Portfolios > Fee portfolios, when trying to click on the folder or plus sign beside it, it wouldn't expand. If the user clicked around a little it eventually worked.
-Reported by Melissa Seehorn on behalf of KSM (22271)

Service level provisions not being reduced properly by automatic process
10709 Automatic provision reductions were only ever by client and needed to be broken down by service.
-Reported by Tony Doyle

[QQ] in Job name and template not correctly displaying next quarter when rolled
10727 When a job template had been set up using the [QQ] in the job name, when the job was rolled it was incorrectly displaying the job name as “Q1 Job Name_1- Q1 Job Name(1)”, instead of using the next Quarter in the name, for example, “Q2”.
-Reported by Melissa Seehorn

MODIFICATIONS 9.6.(1)7166.27130

Job Template Definition Enhancement
10533 It was suggested that the ability to define from within the Job template name, a Q# on the calendar year would be useful. The Q# is based in the job period start, so if users add [QY] to the job template name then once created the job will have either Q1, Q2, Q3 or Q4 showing in it.
-Suggested by Ricky Siu

BUILD 9.6.(1).7249.24222

FIXES

Staff Personal Details unrestricted in Connection Editor
10773 If a user didn’t have access to normal staff search but were adding connections it was found they could still add a staff member but view their personal details. Personal details when adding connections was made private for those users without access to the StaffSearch permission.
-Reported by Ellis Birt

Can access all staff in Classic Approval
10737 It was found that if a user had the TimeReview permission only and none of the GlobReview, OffReview or DeptReview permissions, that they would get access to all staff in Classic Approval.
-Reported by Andrew Hambly on behalf of AAB

Couldn’t Cancel future leave requests as Header was marked as Posted
10723 It was found that users were unable to cancel future leave requests, and it seemed that the Header was being marked as Posted, preventing the cancellation of the request.
-Reported by Michelle Jenkins

CC and BCC addresses in fee email dialog
10719 The system used to show the CC and BCC addresses in the fee email dialog screen, but wasn’t.
-Reported by Tony Doyle

Credit Control Events grid only showed 1 event
10717 In the Credit Control Events grid, it only seemed to be listing one event.
-Reported by Ben Edwards

Assurance Relationships tab not saving title change

10714 When in an assurance request and on the relationships tab, if you added a new relationship and changed the title and saved it, the title reverted back to the type that was selected. The title wasn't showing what you had changed it to.

AND

Default Nationality from request admin not honoured

10713 In assurance request setup under person, if you right clicked on the nationality and selected edit and changed the default to American, when creating a new person assurance request, the nationality was still defaulting to British.

-Reported by Melissa Seehorn on behalf of Muellor Prost (24068)

Can't export large reports from group lockup

10707 from the financial dashlet on a client's dashboard under the group section, you could click on the lockup and select all entries by clicking on the top actions checkbox and then click the print billing guides button. The report itself was printing ok, but if you clicked the save as menu and selected Export Data, nothing was happening and the page errored saying the resource had been removed.

-Reported by Melissa Seehorn on behalf of CBIZ (23949)

Prospects/Assurance Job_Code error message

10691 When creating a prospect and adding a new opportunity once you marked it as sold/won and browsed to assurance to find the new request, when accessing the engagement section and clicking on the job that was added from the prospect opportunity and clicking save, a Job_Code error was produced.

-Reported by Melissa Seehorn

Active service check box in assurance

10688 In assurance engagement when creating a client and adding services in the services tab, if you unticked the service is active tick box on a single service and then went to the jobs tab, the inactive service was showing in the drop down. Once the client was pushed through gatekeeping, a job was created for that inactive service and was available for timesheet and expense entry, but if you tried to create a new job on the client, that inactive service wasn't displayed (correctly) for job creation.

-Reported by Victoria Stephenson

Could save Short name details in mobile view

10687 it was found that in mobile view, you couldn't change and save successfully and client's short name.

-Reported by Michelle Harris

Error when making preferred

10683 in connections tab in a client's details, when adding a new connection, if the user clicked the "make preferred" button, they couldn't' successfully save the changes and would get an error message.

-Reported by Victoria Stephenson

Hidden ADV Sort when using columns menu

10674 The menu displayed from the grid headers by using the arrow button beside "columns" was found to be hiding the top listed option, which was Advance Sort.

-Reported by Victoria Stephenson

Hover over client details should display the ContIndex

10673 There used to be the client's ContIndex displayed when hovering your mouse cursor over the client name in client details, but that seemed to be missing.
-Reported by Michelle Harris

Report Layouts Add New Button

10666 In admin, categories, main categories, report layouts, when clicking Add New, nothing was shown in the far-right page. Instead only grid lines were displayed with no fields to input information.
-Reported by James Arthur

Classic Approval pages show Posted time

10629 In timesheets > classic approval, posted timesheets were being displayed.
-Reported by Michelle Harris

Change of rating status causes error message

10611 If a user created a prospect with the same name as an existing client, and selected to create it from that existing client (to tie them together), and then went to the opportunities page and set the rating as "won" and clicked the save button, an error message was produced: cannot insert the value NULL into column 'Job_Idx'…
-Reported by Melissa Seehorn on behalf of Holtzman Partners (23511)

Emailing single fees not working

10609 The emailing of single fees was not working correctly as the CC and BCC fields were not being populated. The system uses the system options of EMLINVBCC & EMLINVCC to determine these email addresses and where they sit- they can be a FIXED email address or if you put CRED in the field OptionUser1 it will use the Credit Controller of the client.
-Reported by Tony Doyle

Re-insert report for Locked WIP on clients

10607 There was a report in version 8 that displayed details of locked WIP on clients. This has been added back in. You can access this by printing off the billing guide through the WIP transactions on a client and at the very bottom of the report there's a locked WIP box indicating the WIP locked on clients.
-Reported by Andrew Hambly

Two prospect Status categories

10601 It was found that there was two of the same categories, called Prospect Status. One was renamed to "Prospect Event Actions", while the other stays as "Prospect Status".
-Reported by Michelle Harris

Error when saving job by Task

10560 When setting a task to work with WIP, then changing the budget to be By Task, if you changed it back to By Job and saved it and changed a task to NOT work with WIP, if the user then went to the jobs budget and selected By Task again, it didn't work and displayed an error message: "The underlying provider failed on rollback".
-Reported by Tim Johnstone

PE Error message when trying to add a new budget type in categories

10546 In Main categories, if you tried to add a new budget type, the system would provide the PE error message on a blue screen.

-Reported by Michelle Harris

Completed tasks on jobs not updating the Next Action date correctly
10540 The Next Action column in the jobs grid was not updating correctly when setting a task to complete.
-Reported by Brad Podzius

Typo in Client Extended Search
10537 In the client extended search, the word Organisation was spelt differently on the search filter area than the same word in the Grid below containing your filtered results.
-Reported by Victoria Stephenson

Unable to delete DISB codes from PEWC
10360 If creating a new analysis code for disbursements you weren't able to delete the code, even if nothing had been put to it through expenses and the like. Instead you got the following error message: Procedure or function `pe6_ChargeCodes_Delete` expects parameter `@ChargeExtender`, which was not supplied.
-Reported by Melissa Seehorn

Accepting a job didn't close the acceptance dialog box
10162 After a job had been forwarded to a staff member, and you accessed the jobs from the staff jobs menu, the job acceptance dialog appeared asking the user if they wanted to accept the jobs forwarded to them. If you clicked accept and not accept all, the job stayed where it was in the dialog until you clicked accept all at the bottom of the dialog box. Clicking Accept on one single job will now close the job dialog.
-Reported by Victoria Stephenson

Grammar correction in expenses
9821 In expense when submitting with a receipt with no allocation added to it, the grammar of the error message on the page was incorrect- "Receipts has no allocations". This was changed to "Receipt has no allocations".
-Reported by Victoria Stephenson

Unable to access the action button on connections dialog in contact and client details
9596 On a laptop screen if a user went to add a new connection to a client or contact the dialog didn't have a scroll bar available in order to allow access to the buttons at the base of the form.
-Reported by Victoria Stephenson

Update ClientByCodeAsync on the ClientLookupService to accept StaffIndex
10780 If users didn't have access to a client in a particular department (no access to the department the client was in), then you could paste the client's dashboard link into the URL field and access it.
-Reported by Andrew Hambly

Scheduler scrolling to top and not showing paste option when using context menu
10848 If a user had a long list in the department schedule and right clicked on an item and selected either copy or delete, the screen would jump back to the top of the page. Having copied, if they right clicked in a blank cell, they didn't get the paste option.
-Reported by Adam Morgan

Global Custom Job Portfolios not working for Tax Jobs
10851 When a user goes to a custom job portfolio (i.e. "Account Tax Job Portfolio") in the Staff Menu, they would want to see the Tax Jobs listed.
-Reported by Brad Podzius

Hidden ADV Sort when using columns menu
10674 & 10757 The columns drop down menu on grids was hidden behind the Grid header on all grids. This prevented users from being able to use the "ADV SORT" option from the menu.
-Reported by Victoria Stephenson

MODIFICATIONS 9.6.(1).7249.24222

PersonTitle needed to be increased
10718 The Person Title fields were increased to 50 characters for Staff Details, when creating new Staff, and in Assurance.
-Suggested by Tony Doyle

Additional Workflow modifications
10784 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 "un-delete" 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.
-Suggested by Andrew Hambly on behalf of CBIZ

Change Departments category
10700 All the departments 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.
-Suggested by Mike Francis

Client Staff and Jobs export
10906 Changes were made to the Client, Staff and Jobs export.
-Suggested by Michael Caltagirone

Staff Search changes
10168 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. You will now see a caption underneath the search field saying "The Staff information will appear once you enter at least 3 characters into the search field".
-Suggested by Tim Johnstone

Contact Search changes
10167 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. You will now see a caption underneath the search field saying "The Contact information will appear once you enter at least 3 characters into the search field".
-Suggested by Tim Johnstone

Client Search Changes
10166 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. You will now see a caption underneath the search field saying "The Client information will appear once you enter at least 3 characters into the search field".
-Suggested by Tim Johnstone

Make Analysis Code description a Standard Column
9882 It was requested that the Analysis code description was made a standard column on the timesheet grid list.
-Suggested by Brad Podzius

Add workflowUpdate permission
10868 A permission was requested to override specific fields as editable. This permission was added and is called "JobWorkflowUpdate".
-Suggested by Andrew Hambly on behalf of CBIZ

Remove email delay
10910 The 30 second delay from email service was removed.
-Suggested by Andrew Hambly

BUILD 9.6.(1).7314.33158

FIXES

Finance Charges with a 0 selected minimum balance
10993 It was found when generating finance charges (interest), and selecting 0.00 as a minimum amount, the system created 0.00 finance charges for the clients.
-Reported by Michelle White on behalf of Geffen

Preferred relationship not saved in assurance when the contact is new
10946 When adding an organisation request through assurance, if you added a person record to that same request and tried to add that new contact record as the preferred contact/relationship, the system lost the JobNo in tblVContactRelationships. The request when approved, lost the relationship of the new contact, because the new contact didn't exist in the system yet.
-Reported by Michelle Jenkins on behalf of Buzzacott (24707)

Able to transfer WIP on a locked client to another
10945 It seemed that if you accessed a locked clients contact record through contact > Search (search for the locked client), actions > Contact Details > Client tab > Actions > Details, the system loaded the client status as active and the user could go to the client task pad and select transfer WIP to another client, even though it was a locked client.
-Reported by Michelle Jenkins on behalf of Hays Macintyre (25880)

Email Service Pause
10944 The system was waiting 30 seconds to allow for attachments to be added to the database, which was causing delays in emails being sent, so this has been dropped to 10 seconds and to poll for new emails more frequently.
-Reported by Michelle Jenkins

Jurisdiction Service statuses list order
10933 The jurisdiction service statuses in special categories weren't being listed in order within jurisdiction drop down on the jobs.
-Reported by Melissa Seehorn

Client Staffing Page
10928 When adding staff on the Client Staffing page, staff who were not partner or manager grade were able to be added as engagement partner or manager from Client Staffing.
-Reported by Melissa Seehorn

PE Filer Document Uploader
10927 The date field was defaulting to today's date, even if another date had previously been set to remember by clicking on the field box.
-Reported by Ben Edwards on behalf of Wilder Coe

PE Filer reassigning documents
10926 It was found that users were unable to reassign documents in Document Search, existing search.
-Reported by Ben Edwards on behalf of Wilder Coe

Abandoning an Assurance Request returned users to My Assurance Requests
10924 If a user had opened the All Assurance Requests page and opened a request, if they abandoned that request, the system returned them to "My Assurance Requests" instead of the page they started on, which happened to be All Assurance Requests.
-Reported by Michelle Harris

Client Industry when Inactive showing in the Industry field in assurance setup
10923 From Admin, Categories, Client Industry, if an industry was not active, that Industry would still be listed in the Industry field within assurance when creating a new client.
-Reported by Alex Priore on behalf of Withum (20726)

Totals in Expenses displaying in red for allocations on mileage
10867 It was found that linking a receipt to a mileage allocation wasn't working correctly as the amounts would be different. This was fixed, but it still left the amounts highlighted in red.
-Reported by Michelle Harris and Andrew Hambly

Client Service changes
10809 If the "Only Matching" setting in PEWC Transaction settings was active, and changes were made to the client's partner or manager, although the change was flowing correctly through to the services that have matching partners and managers, it wasn't appearing in the Oner History on the services.
-Reported by Michelle Harris

Timesheet status in manage section of timesheet admin
10808 It was found that some weeks where staff had not reached their target hours, the timesheet was still coming up as complete, but the complete status should only be complete if the entries are all complete AND the user has reached the target hours for the week.
-Reported by Michelle Harris on behalf of Hays MacIntyre

Expense ID not loading
10807 It was decided to build in an increase of local storage where clients have lots of clients and client jobs, as they were receiving storage errors.
-Reported by Michelle Jenkins on behalf of Meridian (24860)

Expenses Approval
10806 It was found that the ExpManList, ExpManRef permissions were the wrong way round on one of the paragraphs in expenseController.cs. It was found that this was allowing people to approve expenses even though they didn't have the following permissions: ExpOffReview, ExpReview, ExpDevReview, ExpGloReview. The permissions pertaining to the approval of expenses are now:
ExpOffRev
ExpManRev
ExpGloRevi
ExpDevRev
-Reported by Michelle Jenkins on behalf of Mazars (24715)

Time not calculating on report properly as it never gets posted to WIP
10905 If a timer was started on an existing line, it had a valid @MinDetailID, and it added a new line from the timer into tblTSO_Details, giving it a status of whatever the status of the timesheet line with that @MinDetailID. If this was posted the timer line went straight in as posted status, and never got posted to WIP because it already thought it was posted. A change was made to the SP so that a new time line goes in as Active when it is stopped.
-Reported by Adam Morgan

Staff Personal details unrestricted in phone book search
10774 It was found that if a user didn't have access to the staff search, they could still access a staff user's details through the staff search tab on the phone book.
-Reported by Ellis Birt on behalf of Brown Butler

Prospects Dashlet Opportunities not updated
10771 In the prospect module, the star icon beside each prospect and opportunity dictates what appears under the staff member's prospect list. If a user browsed to the Staff dashboard – Prospect Dashlet, and clicked on the opportunities number which takes the user to their prospects list, they could click the favourite star on one of the lines, to remove them from their list. On returning to the dashlet, the figure beside the opportunities hadn't updated to reflect the change.
-Reported by Melissa Seehorn on behalf of Grimbleby Coleman (24470)

Client notes not saving and displays Null
10770 If a client had no existing notes in the client details, when a user tried to add some, the dialog displayed a null in the dialog box, so when they added their notes and clicked save, nothing happened.
-Reported by Brad Podzius

Missing Adv Sort option in grid drop downs
10757 In any grid in the system, the drop down menu beside the columns button on the grid header was being partially covered by the Column header.
-Reported by Melissa Seehorn on behalf of Grimbleby Coleman (24677)

Fee Portfolio- Right click fee not working

10755 From Portfolio, Fee Portfolio, when clicking on WIP and expanding to select Entire Portfolio, users could right click on a client name and select fee, but nothing was happening.

-Reported by Melissa Seehorn

Job Template budgets not saving

10741 For job templates with a budget of Task by Role, with amounts entered into the hours fields, if a user created a job on a client from that same job, the amounts from the budgets set o the job template were not being populated.

-Reported by Melissa Seehorn on behalf of Holtzman Partners (24507)

Able to transfer WIP to a locked client

10945 It was found that if a user went to the contact search and searched for the contact record of a locked client, they could go into the client details on that record, and access the locked client's details and transfer WIP even though it was a locked client.

-Reported by Michelle Jenkins on behalf of Hays MacIntyre (25880)

Error when selecting email wording after drafting a fee

10934 Client's had been receiving an error message when email wording was selected after drafting a fee, when finalising at the close of the billing wizard. When clicking on the envelope on the bill preview screen, once they selected the sub category of email wording, the error was displayed.

-Reported by Michelle Jenkins on behalf of Francis Clark

Grid sort for Jobs

10904 When in a jobs list page (standard job management for example), if a user added the service column, sorted the list by service by clicking on the service header, removed the column then re-added that same column, the grid was still sorting by service instead of clearing the sort that had been applied before removal.

-Reported by Melissa Seehorn on behalf of Hogan Taylor (25272)

Start timer and collapse timesheet panel not saving changes

10877 If a user opened an existing timesheet in panel view and started the timer in the timesheet grid, added some notes in the notes field and closed the panel view, the changes weren't saved as the page wasn't prompting the user to save the changes made. A prompt has now been added.

-Reported by Michelle Jenkins on behalf of Francis Clark

Inactive Contact can still be preferred contact

10635 It was found that if a user marked a connection (contact) as inactive and that connection/contact was the preferred contact, it was remaining the preferred contact. It was decided that making a contact inactive would remove the contact from being preferred for any user.

-reported by Michelle Harris

Add Client Name to Job WIP and Job WIP Details Views

11024 The Client's name was added to the job name and code to the Job WIP and Job WIP View details.

-Reported by Michelle Jenkins and Victoria Stephenson on behalf of Hays MacIntyre (26520)

MODIFICATIONS 9.6.(1).7314.33158

Add ability to auto fill the schedule dialog when accessing the schedule from within the job
10869 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.
-Suggested by Tim Johnstone and Michelle Harris

Service Editor in timesheets- No Partner/Manager displayed as default
10624 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.
-Suggested by Michelle Harris

Storage of updated date and user on notes and history
10534 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.
-Suggested by Victoria Stephenson

Change CurrentDueDate calculation
11023 A change was made to the CurrentDueDate calculation to not clear when all jurisdictions are complete.
-Reported by Andrew Hambly

BUILD 9.6.(1)7368.24459

FIXES

Assurance constraints on 3 fields making fields required in the DB
11074 When creating a new person, users found that on approval they were getting an error message, such as "Cannot insert the value NULL into column 'PersonOccupation', table…", even though the Person Occupation field hadn't been selected for use in Assurance requests. The Same happened for PersonMaritalStatus (MaritalStatus) and ContBusiness (BusinessType).
-Reported by Steve Thornton

Unable to add more than one Jurisdiction Status in PEWC
11069 When a user clicked "NEW", the statusIndex was populated as "0" and should have been using the next available statusIndex number in order, however this wasn't occurring when a client had set one of the status' with a statusIndex of 0. The StatusIndex is now displayed in the set-up form as "-1", but once created the system correctly assigns it the next status number in order.
-Reported by Brad Podzius and Andrew Hambly on behalf of CBIZ

Go Login Now produces Error messsge
11068 When a new user clicked upon the link in the email to set their own password, they received a "File not found" error message when clicking on the "Login now" button.
-Reported by Michelle Jenkins on behalf of Mazars (27057)

Expenses getting posted twice

11067 Intermittently users were experi4encing expenses being posted twice in the WIP tables.
-Reported by Chris Hunter on behalf of Withum (26366)

Jurisdictions using the job base date instead of their own

11065 If users added multiple jurisdictions with different base dates to the same job they all calculated based on the jobs base date and not the base date that applies to that jurisdiction calculation.
-Reported by Brad Podzius

Users able to access other user's expenses through adding Expense ID to URL

11061 A user was able to access other staff user's expenses by adding various Expense ID'S to the URL, even though they didn't have permissions to do so.
-Reported by Larry Barge on behalf of Clearview (26736)

Changes to pes_JurisdictionStatus_Delete Master SP's

11058 This SP does a check to see if a jurisdiction status can be deleted. One of the checks was looking at a wrong table/column so it prevented users from being able to delete when they should be able to.
-Reported by Michelle Jenkins on behalf of Muellor Prost (26712)

Job Rates by Grade

11057 A change was made to rates by Grade. This used to automatically add all grades and default to 0, but now users will need to add them specifically.
-Reported by Brad Podzius and Andrew Hambly

Live warehouse issues: Source code for date dimensions didn't exist

11054 DimDates only went up to a certain date, and this caused issues for clients using DimDates as their Date Dimensions as they couldn't get their Budget data from their other databases into reports or Other budgets into reports.
-Reported by Michelle Jenkins on behalf of Buzzacott (26920)

Switching the service line in Recurring Fees only displayed "All Open Jobs"

11052 When adding a new line item to a recurring fee, switching the service line only gave the job option of All Open Jobs. You had to close the fee then reopen it to get the dropdown to show all available jobs. "All Open Jobs" is one of the options you can select in the drop down though if users changed the service it's all they saw in the drop down, rather than getting that and the list of active jobs.
-Reported by Alex Priore on behalf of CBIZ

Unable to batch from Group Exposure Details grid

11051 When trying to batch clients from the Group Exposure Details grid, nothing happened. Users had tried batching both with the check boxes checked and unchecked, but still nothing had happened.
-Reported by Alex Priore on behalf of CBIZ

Other Address not pulling into draft fees

11050 Addresses showing in client details under "Other" weren't coming through to the fees in the billing wizard.
-Reported by Melissa Seehorn on behalf of Hogan Taylor (26825)

Jobs duplicating in grid when updated
11049 When jobs were updated, they seemed to duplicate.
-Reported by Alex Priore

Space Bar and TAB not loading up all staff within a department in Security Admin
11047 A user was adding permissions by pressing the Space bar and TAB but the permissions were only being added to the 50 users loaded on the page which is correct and by design. Users need to use the bulk add all option in order to add the permission to all users. Though this meant there was no way to review which staff had which particular permissions within a department. This has been changed to allow for that.
-Reported by Michelle Jenkins on behalf of Buzzacott (26524)

Previously allocated unit-based allocations were stopping disbursements from submitting
11045 On some previously allocated unit-based allocations with receipts, when returning to the disbursement and opening up the allocation to change it or remove it from the receipt, they were unable to do so as the allocation wasn't showing that it was attached to a receipt.
-Reported by Andrew Hambly and Victoria Stephenson

Able to enter time to suspended clients
11044 Even though the "Lock Suspended Clients" setting was active, when users went to a suspended client, and opened up a job they could still access and use the time entry button, and in doing so a timer was created for that job on the suspended client. This was fixed.
-Reported by Vicky Stephenson

Able to submit expense allocation without Job details
11040 It was found that users could create allocations and enter all details but the job. Once they clicked Add, the line no longer appeared, so the user couldn't go back and update the information. The user could still save the expense and submit it, but nothing happened when they did so. This was causing issues for users when the expense had other items, and all seemed to be fully allocated but the system wasn't allowing the user to submit the expense.
-Reported by Melissa Seehorn on behalf of CSH (26363)

Assurance requiring MaritalStatus for people contacts and producing error message on Approval
11028 It was found that when trying to approve an assurance request, that it was requiring Person Marital Status. A change was made to the SP governing the addition of new (live) contacts.
-Reported by Brad Podzius

Error message when marking prospect as won when created from existing prospect
11027 In the prospect module when adding a new prospect, if a user entered the name of an existing prospect and selected to use an existing contact then went to the opportunities tab to add a new opportunity, when they selected an existing job template and marked it as won, an error message was produced "Cannot insert the value NULL into column BaseDate…".
-Reported by Melissa Seehorn on behalf of Holtzman Partners (26305)

Able to add duplicate Prospects
11026 A user could enter the exact duplicate of an existing prospect, and no check message error was produced.
-Reported by Vicky Stephenson

Pes_Job_HistoryAndNotes

11022 A change was made to the titled SP to ensure that it worked from the new jurisdiction tables instead of the old ones. (tblJurisdiction instead of tblStateJurisdiction)

-Reported by Brad Podzius

Jurisdiction note not added to deleted notes tab in history when deleted

11019 Users had found that when deleting a Jurisdiction note the note was deleted completely, and only recorded in the history tab of the job. The deleted note should be showing in the deleted notes tab of the history panel on the job, with an undelete button.

-Reported by Alex Priore

Error message to tell users of incorrect currency when posting lodgements/deposits

11020 The system was not returning an error message to users when deposits weren't posting as a result of an invalid currency rate. Instead of giving the usual "we are sorry but an unexpected error has occurred", there was instead an error in the event viewer saying it couldn't insert the value NULL into debtTranCurrency.

-Reported by Michelle Jenkins on behalf of Blick Rothenburg (25717)

Able to add multiple jobs with same name in Assurance

11002 In new assurance requests, users were able to add the same jobs with the same names repeatedly. Once through gatekeeping the jobs were created but no two jobs can have the same name so on opening the jobs, the system would highlight the Name and tell the user the Job Name isn't Unique. This has been changed so that no two jobs can be given the same name within assurance.

-Reported by Brad Podzius

MODIFICATIONS 9.6.(1)7368.24459

Add grid detailing of the licence types and how many available

11053 It was requested that a grid detailing the licence types, how many users of each type were added to a grid to help users keep tabs on the licences they had. The grid at the top of the "New Staff" page shows Licence types of "Full User, Intern User, Nominal user", and shows how many of each they have allocated and how many of those have been or are being used.

-Suggested by Dee Lowrey

BUILD 9.6.(1)7397.29176

FIXES

Updated by and On details not updated from Portfolio Staff Budgets

11152 If a user edited a staff budgets from the Portfolio staff Budgets page, and saved the changes, the Updated by and Updated On details were not updated.

-Reported by Michelle Jenkins on behalf of Buzzacott (27521)

Job Budget not updated when item deleted from schedule

11152 When deleting an item from the job or department schedule. The job budget was not being updated correctly to reflect the changes.

-Reported by Andrew Hambly on behalf of Larson Gross

Collapsing Panel view on a Posted timesheet entry asks to save changes
11142 It was found that if a user clicked a Posted entry in the panel view within timesheets without making changes and collapsed it again after viewing, that the system was asking the user to save changes or lose changes even though the user hadn't made any changes to the entry.
-Reported by Victoria Stephenson

Questionnaire not being recorded on questionnaire
11083 When a user browsed to a client's job and clicked on the Questionnaires panel and then filled out the details, saved, and submitted it, the Questionnaire panel shows the Questionnaire was submitted and the date it was submitted. If another user went in and changed the information, and then resubmitted the questionnaire, the History button showed that the questionnaire was resubmitted but the Questionnaire panel was not updated with the latest date it was submitted.
-Reported by Melissa Seehorn on behalf of Mueller Prost (27134)

Timesheet Approve Week SP change
11082 A standard SP needed a change made to an If Statement to ensure it ran correctly.
-Reported by Ben Edwards

Timesheets: auto timesheet creation creates new timesheets with a status of Posted
11081 A user had found that their timesheets being created automatically, were being created but with a status of POSTED instead of IDLE or ACTIVE.
-Reported by Michelle Jenkins on behalf of Blick Rothenburg (27367)

Favourite-d timesheet entry throwing index error once client marked as suspended
11080 If a user was in their timesheet and they marked a timesheet entry as a favourite, then that client was marked as suspended pending loss, on returning to the timesheet and trying to add the entry from the favourite's menu, users were getting an error message.
-Reported by Melissa Seehorn

Time Entry from Job details uses incorrect rate
11075 On a job on a client opened fully, if a user clicked the time entry button a timer entry was created, but the rate the entry defaulted to was the charge rate of the client, not the charge rate assigned to the service that the job was on.
It's worth noting that manually adding an entry, when selecting the service and job, resulted in the correct service rate being updated to the entry, unlike when using the "Time Entry" button from within the job.
-Reported by Chris Hunter on behalf of ATA (27202)

Jurisdiction Status Ordering
11072 The SP that dealt with status ordering for Jurisdictions wasn't using the field order. This dictates the order in which the user views the jurisdictions statuses listed within jobs on the jurisdiction tab. The StatusOrder was added to the SP in order to correct this.
-Reported by Ricky Siu

Auth site fails if user is in too many groups
11037 It was found that if a user was in too many AD groups and they were using Windows Auth, then the login would fail.
-Reported by Ben Edwards

Need to handle NULL values on required fields in Assurance
11077 A change was made to allow NULL values on required fields in Assurance in order to fix the setting of basic default values on People.
-Reported by Andrew Hambly

Duplicated Job Budgets when using ETC on timesheets
11091 It was found that duplications were appearing when using ETC on timesheets. A missing "Where" clause was added to the ETC update in order to fix this.
-Reported by Melissa Seehorn

MODIFICATIONS 9.6.(1)7397.29176

Add a check message when clicking delete on reports
11106 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.
-Suggested by Chris Hunter and Andrew Hambly

Locations Dialog needed a cancel button
11071 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.
-Suggested by Victoria Stephenson

Add staff name to narrative in pes_expense_posting
11111 A change was made to the expense posting SP, adding the Staff Name to the narrative.
-Suggested by Michael Caltagirone

BUILD 9.6.(1)7506

FIXES 9.6.(1)7506.24920

Date picker double click issue
11134 There was an issue when double clicking on the date picker. This was noticed within the Assurance Questionnaire pages.
-Reported by Mike Caltagirone

RFP Receipts still displaying in the RFP Receipts page
11169 An RFP Receipt that had been reversed was still being displayed on the RFP Receipts page.
-Reported by James Arthur

Jobs without a period start displaying an error in timesheet entry
11175 Jobs that did not have a period start were displaying an error within timesheet entry. This was actually fixed in V9.6.7397.29176
-Reported by Ben Edwards on behalf of Price Bailey

New dialog loaded on completion of job questionnaires
11183 On the completion and submission of a job questionnaire, a new job dialog is loaded rather than closing the job questionnaire.
-Reported by Vicky Stephenson

Timesheets – Remove the 0 in the Status footer of the timesheet grid
11184 The Status column displayed a 0 in the footer. This was not required.
-Reported by Vicky Stephenson

Assurance Validation screen – User Interface
11186 The buttons on the Assurance Validation screen overlapped when not viewing the page in full screen.
-Reported by Michelle Harris

Posted timesheets showing in Classic Approval
11187 Posted timesheets were being displayed within the Classic Approval view when looking at timesheets ready for approval.
-Reported by Vicky Stephenson

Using the Create Timesheet entry from the client Dashboard caused an error
11190 When creating a timesheet entry from the Client Actions dashlet, an error was displayed indicating that there were no Timesheet Weeks available although timesheet weeks were available.
-Reported by Vicky Stephenson

Change the default on job notes
11193 Remove the default action on a job note when a note type has not been selected.
-Reported by Brad Podzius

Unable to create an RFP Receipt from a Reallocated Receipt
11203 RFP Receipts couldn't be created from Reallocated Receipts.
-Reported by Tim Johnstone

Unassign Request Validation
11215 When a validator was unassigned from an assurance request, the request was not displayed in the Unassigned Requests page.
-Reported by Michelle Harris

Timesheets – Release All not updating entries
11218 Timesheet entries were not being posted when using the Release All option.
-Reported by Michelle Harris

Staff Charge Rates page not updating after setting to Autopost on Complete
11220 The values for the Autopost on Complete were not updating on the Staff Charge Rates page after they had been updated. This meant that timesheet entries were not being posted when marked as Complete.
-Reported by Michelle Harris

Expenses – Unsaved claim showed a status of New instead of Active

11229 When a new expense claim is created but not saved when navigating away, the status is set as New. It is not possible to see New claims from the Active refiner within Others. The fix was to show both New and Active claims on the Active refiners.

-Reported by Dee Lowery on behalf of Davidson

Prospects – Ownership Codes not limited by entity type

11255 The Ownership types listed within the Prospects pages were not restricted by the entity type of the prospect.

-Reported by David Kelso on behalf of Capin Crouse

Cannot manually type dates into the date field on reports

11289 It was not possible to manually type the date into the date field within parameters of a report.

-Reported by Ricky Siu on behalf of Olsen Thielen

Client DRS/AR Collection Details – Show Group button showing when Ad Hoc details are selected

11294 The Show Group button against the Related Credit Contact on the DRS/AR Collection page was displayed when Ad Hoc Details were selected. If Ad Hoc details are selected this button should not be displayed.

-Reported by Martyn Crompton

Wrong Email wording type loaded on RFP Receipt Print from the DRS/AR Transactions

11354 Emailing an RFP Receipt from the Client DRS/AR Transactions uses the Invoice Email wordings rather than the RFP Receipt email wordings

-Reported by Michelle Jenkins

MODIFICATIONS 9.6.(1)7506.24920

Add sourceindex and new constraint to WIP to avoid double posting

11204 SourceIndex and a new constraint has been added to WIP transactions to avoid double posting

-Reported by Tim Johnstone

BUILD 9.6.(1)7527

FIXES 9.6.(1)7527.15386

Remove views option from Permissions node of Categories

9406 The Views option referred to a deprecated feature and was no longer required. This has now been removed.

-Reported by Michelle Harris

Timesheet entries against a financial client

9681 The Client Actions dashlet was allowing timesheet entries to Financial clients. It is not possible to record time against Financial clients. This has been rectified.

-Reported by Paul Chipperfield

Staff Extended Search – Data and Filtered Data exports producing incorrect results
9682 The system was loading more results than expected within the Extended style staff search. This has been resolved.
-Reported by Victor Timotin

Timesheet calendar dates
9729 The timesheet calendar was displaying dates prior to the programmed cut off dates. The calendar has now been restricted to only 6 months prior to the current date.
-Reported by Vicky Stephenson

Get Help Now button
11090 The ZenDesk Widget that was driving the Get Help Now functionality was not working
-Reported by Martyn Crompton on behalf of WMT (27537)

Adding an opportunity to a multiple engagement
11301 Adding an opportunity to a multiple engagement was putting the opportunity against the underlying contact instead of the relevant client. This has now been fixed.
-Reported by Michelle Harris

Close action missing from Select Group Clients to update dialog
11398 The Select Group Clients dialog that is displayed when clicking onto Show Credit Group from the Client DRS/ AR Collection details did not have a X available to close the dialog without having to scroll to the bottom of the window. This has now been added.
-Reported by Vicky Stephenson

Images Folder
11414 An empty temp folder needed to be added to the Images folder to stop users getting an error when in Categories. This has now been added as part of the standard install/ upgrade process.
-Reported by Tim Johnstone

Credit Terms not showing when new ones have been added
11415 New Credit Terms were not being displayed within the Client DRS/AR Collection page. This has been rectified and the field picks up any Credit Terms set in the CreditTerms category.
-Reported by Michelle Jenkins on behalf of Langham Hall (29425)

Ticking the 'Allows RFP's' on the Organisation category
11416 Ticking/ Unticking the 'Allows RFP's' checkbox on the Organisation category was clearing the VAT Invoice number. This has now been resolved.
-Reported by Martyn Crompton (29396)

Unable to remove a Job Deadline Date
11449 It was not possible to remove a job deadline date from the Dates panel of a job. This has been fixed.
-Reported by Michelle Harris

Prospect attributes not copying to client when converting a prospect
11459 Prospect attributes were not copying onto the client with the Prospect was won. This has now been resolved.
-Reported by Melissa Seehorn on behalf of Capin Crouse (29625)

Staff Details – change history comments not being saved
11462 The comments were not being saved into the change history when staff details were being changed. This has been rectified.
-Reported by Melissa Seehorn on behalf of Janover LLP (29344)

Attributes with a drop down of over 50 do not work
11486 If an attribute is set up to display a drop down list of results, having more than 50 results changes the drop down to become a search field. This was not working correctly and has now been fixed to behave correctly.
-Reported by Melissa Seehorn on behalf of Capin Crouse (29641)

Error when adding an opportunity
11699 An error occurred when adding an opportunity to an existing contact. This was due to the Prospect being an existing contact and not an existing client. This has been resolved.
-Reported by Michelle Jenkins on behalf of Holtzman Partners (29948)

Timesheet permissions not being honoured in classic approval
11700 The removal of GlobReview and TimeReview was not removing access to other staff timesheets within Classic Approval. This is now behaving correctly.
-Reported by Michelle Jenkins on behalf of Streets

Jobs are deleted even if No is selected when confirming the action
11747 Jobs were being deleted even when a user clicked onto the No of the confirmation dialog. This is now working correctly.
-Reported by Brad Podzius

BUILD 9.6.(1)7556

FIXES 9.6.(1)7556.17855

Assurance – adding multiple engagements
11746 Adding a multiple engagement to an existing contact produced an error
-Reported by Vicky Stephenson

Custom job portfolios
11780 Custom job portfolios were displaying jobs that should not be included. This was due to an omission form the stored procedure.
-Reported by Adam Morgan

Error on Timesheet when loading Out of Scope and Analysis
11781 An error was being displayed when trying to add a new timesheet entry
-Reported by Adam Morgan

BUILD 9.6.(1)7621

FIXES 9.6.(1)7621

USD Receipt re-allocated to a GBP account

12325 - The system was allowing a receipt in one currency to be re-allocated to an account in a different currency, causing an imbalance.

-Reported by Michelle Jenkins on behalf of Buzzacott (32192)

Saving attachments on Prospect Attributes

11950 - Saving an attachment against a prospect attribute produces an error

-Reported by Melissa Seehorn on behalf of Capin Crouse (30669)

BUILD 9.6.(1)7682

FIXES 9.6.(1)7682

Upgrader causing job work statuses to be lost

12453 - The 9.6 Post Deploy upgrade scripts was losing job work statuses to be lost if there was not a work status whose abbreviation was INPRO.

-Reported by Tim Johnstone

Bug in Job Budget Import SP

12488 - If there were no prior job budgets, an error was displayed when trying to use the Import button on job budgets.

-Reported by Tye Adeshigbin