Version 9.8 Builds

VERSION 9.8 BUILDS

This document details all bugs and modifications that have been made in each build since V9.8 was released. For details contained in the initial release of V9.8 please see the Release Notes.

Items that are included in a 9.7 build will also be included in the next available 9.8 build.

BUILD 9.8.SP1.7683

MODIFICATIONS

Add an Inline View on the Drafts as Owner/ Creator of the Billing Portfolio
11971 – An Inline View has been added to the Drafts As Creator/ Owner portfolios in the Billing Portfolio. Clicking onto a line will expand the draft bill to provide a summary of what has been included on the Analysis and Narrative of the bill.
-Requested by Janet Zesut

Default Action on the Main Summary Portfolio
12084 – Default actions have been added to all portfolios and levels within the Main Summary Portfolio.
-Requested by Michelle Harris

Changes to default font settings
12400 – Two changes have been made to the default font settings. A global setting has been added to Transaction Settings to lock the default font settings and not allow overrides. It is now also possible to set the default font size against each font within the font list within Categories.
-Requested by multiple users

Expand All option within the Billing Wizard
12401 – Options have been included to be able to Expand All WIP by Staff, Analysis, Task or Role.
-Requested by Brad Podzius

Ability to have a final scheduled bill with a value of 0
11402 – A modification has been made to allow the final scheduled bill within a billing schedule to have a value of 0. The resulting final bill can be set to create either a zero bill or a draft bill with a value of 0.
-Requested by Brad Podzius

Manual When Complete billing type added
12403 – A new billing type has been added – Manual when Complete. Any job using this billing type will appear in the Job Billing Portfolio (when it is marked as complete where) it can then be drafted and the bill subsequently edited. These jobs will not appear when drafting a bill manually from the Client dashboard or the Owner Portfolios in the Billing Portfolio.
-Requested by Brad Podzius

Addition of grouping levels to Add Removed WIP option

12531 – The Add Removed WIP function within the billing wizard has been modified to allow the grouping of the WIP entries by Staff, Analysis, Task or Role. This is only available when the job has been expanded.

-Requested by Michelle Harris

BUILD 9.8.SP1.7709

MODIFICATIONS

Option to make task selection mandatory

11975 – A setting has been added to the Timseheet Administration page to make task selection mandatory when completing a timesheet entry.

-Requested by Hogan Taylor

Timesheet entry – highlight current day

11975 – The current day has been highlighted within the New Time Entry dialog and the inline editing view of the timesheet.

-Requested by Milsted Langdon

Has RFP Receipt indicator on Unallocated Entries

12104 – An additional column has been added to the Unallocated Entries page that displays whether the deposit entry has an RFP receipt. This column can be filtered by entering 'has RFP' into the search field.

-Requested by Michelle Harris

Jobs in Pool dashlet

12404 – A new standard dashlet has been added to display the number of jobs available for each job pool.

-Requested by Brad Podzius

Classic page conversions

Multiple – The following classic pages have been converted to V9 styling:
- Staff Out Of Office
- Staff Extenders
- WIP Transfers
- WIP Journal
- WIP Balanced Journal
- Client Keep In Touch
- Clone Security