IRIS | Practice Engine

Version 9.7 Builds

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VERSION 9.7 BUILDS

This document details all bugs and modifications that have been made in each build since V9.7 was released.

BUILD 9.7.7480.24369

FIXES

Date Pickers start on Sunday instead of Monday
11404 – The date picker was starting the week on a Sunday instead of a Monday. This has now been changed.
-Reported by Steve Thornton

Unallocating a receipt from an invoice
11403 – Unallocating a receipt from an invoice wasn't updating the total on the grid without a refresh. This has been updated to refresh on unallocation.
-Reported by Tim Johnstone

Editing a Receipt
11402 – Edit Entry from a receipt was navigating through to a blank page. This has been rectified and will navigate to the Edit DRS Entry page correctly.
-Reported by Tim Johnstone

Job WIP Allocation
11400 – Job WIP allocation was failing if the staff charge rate was zero. This was happening on Final billing for the job.
-Reported by Mike Francis

Creating Job Templates
11399 – A bit of SQL code was missing when creating Job Templates to insert the new field for Job_Alloacation_Type, causing an error.
-Reported by Ben Edwards

Deactivating a job template
11360 – An error was given when deactivating a job template. This concerned nullable fields in tblJob_tmplt_Header. All unused fields are now allowed to be null.
-Reported by Brad Podzius

Direct Access to objects via URL
10788, 10789, 10790 – Direct access to objects by typing the URL to the page directly into a browser was not checking permissions – this was affecting Expense Claims for Others, Staff Details and Contact Details.
-Reported by Ellis Birt

BUILD 9.7.7503.14949

FIXES

RowVer is missing when adding jurisdictions
11659 – An error was being displayed indicating that RowVer is required when saving jurisdictions after adding a new jurisdiction on a job.
-Reported by David Kelso

Recalculate spelt incorrectly on Job Billing Allocation Type
11597 – Recalculate was spelt incorrectly on the Allocation Type within the Job Billing panel.
-Reported by Steve Thornton

Macro Schedule
11487 – Scheduling a macro produced an error message and the macro did not get created.
-Reported by Steve Thornton on behalf of Crowthers

Timesheets – Others not showing correct Unit amount
11460 – The Others tab was incorrectly displaying the units amount within the weekly view. This only affected systems set up to use Units rather than decimal time.
-Reported by Ben Edwards on behalf of Dragon Argent

Prospect attributes not copying to the client when 'Won'
11453 – Attributes completed on a prospect were not copying across to the client attributes once the Prospect had been marked as Won.
-Reported by Melissa Seehorn on behalf of Capin Crouse (29625)

Prospects – Job name and dates not populating on Opportunity
11452 – Selecting a job template within an opportunity was not populating the job name and dates.
-Reported by Melissa Seehorn on behalf of Capin Crouse (29625)

Inconsistency in naming of Staff level/ Staff grade
11447 – The Staff Details page displayed Staff Level but all other references in the system are to Staff Grade. The Staff Details page has been changed to reflect this.
-Reported by Michelle Harris

Deleting a job template
11446 – Deleting a job template was producing an error.
-Reported by Ben Edwards

Default Credit Memo Layout
11442 – If there are no unlinked credit layouts defined in the system then the existing linked credit layouts will be copied and used.
-Reported by Tim Johnstone

Creating a Job Billing Schedule that uses date triggers
11420 – When a job billing schedule was created using date triggers, the date triggers were not being saved.
-Reported by Steve Thornton on behalf of Crowthers

Client DD mandate not saving Sort Code
11419 – The DD Mandate was not saving the Sort Code if a – was used.
-Reported by Vicky Stephenson

Can't bill WIP on an Internal Job
11417 – It was not possible to create a zero bill for an internal job resulting in not being able to Close the internal job. It is now possible to zero bill an internal job.
-Reported by Tim Johnstone

Data and Filtered Data exports not working on grids
11389 – The Data and Filtered Data exports were not working on some grid screens caused when grids with totals had fields returning NULL.
-Reported by Brad Podzius

MODIFICATIONS

Job Workflow Status Summary
11450 – There was no default action on the Job Workflow Status Summary portfolio. The default action was set to View Job Details.
-Reported by Michelle Harris

Draft Credit Note - Totals
11445 – The Green/ Red totals on the Draft Credit Note wizard displayed To Bill. These have been changed to display To Credit.
-Reported by Michelle Harris

Draft Bill/ Draft Credit Note – Build By options
11444 – The Build By options within a credit note and a Draft Bill displayed Build Fee by. This has been changed to display Build By.
-Reported by Michelle Harris

Add an additional Transaction Code for DD Processing
11405 – An additional transaction code of 18 has been added to represent Re-Presented.
-Reported by Michelle Harris on behalf of Crowthers

Default Staff Location
11441 – The default staff location was added back to the Timesheets page in Staff Details. The auto detect option was not working in Citrix environments.
-Reported by Janet Zesut

BUILD 9.7.7513.15708

FIXES

Reversing a zero bill does not activate the job
11463 – A zero bill will automatically mark a job as Closed by default, however if the zero bill is reversed it is not reactivating the closed job as it should be.
-Reported by Janet Zesut

Incorrect currencies showing in various places
11488 – There were several places that an incorrect currency was being displayed. This occurred on the Credit Control dashlet, the collection details of an invoice and in the Edit DRS Entry dialog.
-Reported by Tim Johnstone

API Help link not displaying
11612 – The Swagger Help link from the API Admin page was not displaying correctly.
-Reported by Tim Johnstone

Deleting a PElert schedule displays an error
11613 – Deleting a PElert schedule produces an error.
-Reported by Steve Thornton

Upgrader not setting jobs on tblLeaveTypes
11702 – The 9.7 Upgrader was not setting jobs correctly within tblLeaveTypes.
-Reported by Tim Johnstone

Custom job list not filtering standard jobs
11703 – The list of jobs returned during a search in the custom job portfolios was not being applied to any standard jobs in the list, only tax jobs.
-Reported by Adam Morgan

BUILD 9.7.7529.21012

FIXES

Draft Bill Header – Status label displayed incorrectly
11728 – The Status label was mis-aligned on the New draft Bill page.
-Reported by Vicky Stephenson

Jobs in Assurance not using the template billing settings
11729 – Jobs that were created within Assurance were not picking applying the Billing settings that had been set on the template.
-Reported by Janet Zesut

Bill Confirm and Print Delay
11730 – The Bill Confirm and Print delay was too long. This has been reduced down to 2 seconds.
-Reported by Janet Zesut

New Manual bill displaying Jobs with no WIP even when the Show All button was not checked
11732 – The New Manual Bill page was displaying all manual jobs when the Show All checkbox was not ticked. This has been corrected and only manual jobs with WIP will be displayed until the Show All check box is selected.
-Reported by Janet Zesut

Billing portfolio grids not refreshing
11734 – The Billing Portfolio grids were not refreshing after confirming a bill and removing the confirmed bill from the grid. This has been updated.
-Reported by Janet Zesut

Deactivating the Fee Build category is not removing it from the bill wizard
11738 – Deactivating a Fee Build option within Categories was not removing the option within the billing wizard. This has been updated to only show active Build Bill options.
-Reported by Brad Podzius

Extra paragraph space added before the body of bill paragraphs
11740 – An additional paragraph space was being added when using the Bill Paragraph functionality. This has been removed.
-Reported by Brad Podzius

Cannot delete Timesheet Header
11741 – An error message was being displayed when attempting to delete a timesheet header. This has now been resolved.
-Reported by James Arthur

MODIFICATIONS

Staff Diary pages need to remember selections
11731 – The Staff Diary page reset the selections that had been made after drilling into the detail. This page will now remember the previous selections made when using the Back button.
-Reported by Janet Zesut

Zero Bills set to Progress by default
11733 – Zero bills have been changed to default to Progress rather than Final. They can still be marked as Final Bills but the default behaviour is now to set them as Progress.
-Reported by Janet Zesut

BUILD 9.7.7544.16032

FIXES

Client Owner Group selection not working
11800 - When on the client owner WIP billing portfolio and choosing to view it by Group, the group selection box didn't appear.
-Reported by Michelle White

Staff Work profile editor
11796 - Timesheet header in the timesheet admin > manage tab, was not aligning with the work profile set up on a staff member within their timesheet settings.
-Reported by Victoria Stephenson

Staff Jobs page violation of primary key Error
11798 – When accessing the Staff Jobs page, users were faced with a “Violation of Primary Key constraint...” error message.
-Reported by Victoria Stephenson

Change to Bulk Fee Printing
11795 - Changes were made to the Bulk Fee printing page in Billing Admin to speed up the generation, re-generation and printing of fees.
-Suggested by Andrew Hambly

Default Font not being used
11792 – When setting Arial 12 as the font and size, the system wasn't honouring the default setting in categories.
-Reported by Adam Morgan

Staff Reports Dashlet duplicates
11791 – The SP that returned a list of favourite reports to the staff reports dashlet was working ok, but the UI (user interface) was showing duplications of each report listed.
-Reported by Brad Podzius

Expense Claim for Others displaying error message
11790 – When the user clicked on the "New Claim" button in expenses, nothing happened.
-Reported by Brad Podzius

Bulk Fee Printing not picking up system options or email addresses
11789 - Email addresses set in tblSystemOptions for invoices and statements CC, BCC and From addresses were not being picked up by the Bulk fee Printing page.
-Reported by Adam Morgan

Duplicate New Work Profiles
11788 - when adding a work profile to a Staff user and clicking apply, when going elsewhere in the staff details to make changes and apply those, the work profile entry got added a second time.
-Reported by Brad Podzius

User able to confirm on draft bill without permissions
11787 - If a user did not have FeePost permissions, they could still see an active confirm button within draft fees and were able to click it to confirm a fee.
-Reported by James Arthur

Unlinked Credits not given an automatic fee number
11784 - It was found that unlinked credit notes weren't getting an automatic fee number assigned to them.
-Reported by James Arthur

Checkboxes on Draft as Owner and Creator
11779 - Checkboxes on Draft as Owner and Creator shouldn't be available if the bill has no narrative details when bulk printing. The view button will be disabled when users are in a fee if no narrative is on the bill.
-Reported by Adam Morgan

VAT on Recurring Fees
11778 - The VAT showing on recurring fees was to three decimal places.
-Reported by Michelle Jenkins

Saving report parameters displayed error message
11777 - If a user navigated to Reports > Task pad > Reports Admin, clicked on the parameters tab on any report, adding the parameter details and clicking done, followed by save, an error message was displayed.
-Reported by James Arthur

Department Diary leave entries
11776 - When adding new leave entries, they show amber in colour. It was found that once they were submitted and approved, that they didn't change to the confirmed leave colour of purple, as stated in the page's legend.
-Reported by Victoria Stephenson

Questions not applying required settings in questionnaires page (Jobs Questionnaires)
11773 - If a Questionnaire question was set up to require an answer prior to being available for entry within any of the v9 style pages, the required answer setup was not working as expected. The field should be greyed out until the expected text is entered into the previous and prior question, at which point that field is white and activated.
-Reported by Melissa Seehorn on behalf of PB Mares (30308)

Storing of Jurisdiction Status in the History Table
11765 - It was decided that when entries get into tblJob_History, where the Jurisdiction Status changes, the statusindex needed to be added to the HistData column for reporting purposes
-Reported by Brad Podzius

HistType Status
11764 - When the Jurisdictions were updated, they seemed to be going into tblJob_History as HistType = 4 instead of 3, as the pes_Job_Jurisdiction_Update SP defines.
-Reported by Brad Podzius

Final Zero Bill not adding actual finish date to a closed job
11748 - When creating a Zero Bill against a job, it should auto close the job but it was found that the system wasn't populating the 'Actual End' field within the job with today's date when finalising a zero bill.
-Reported by Lucy Meira

Next Tax/VAT Invoice No. field in Billing Admin
11744 - In the billing admin screen the "Next Tax/VAT Invoice no" was changed to be "Last Tax Invoice no."
-Reported by Tim Johnstone

Leave Type settings not being honoured in new leave requests dialog screen
11743 – It was found that the Leave type settings from the Admin > Leave Types page, were not being honoured in the new leave request dialog, and that users were having to select another leave type, then return to the one they wanted in order for the new leave request fields to follow the expected settings and behaviours set up in the leave types page.
-Reported by Tim Johnstone

Leave Types multiples of not calculating correctly
11742 - When users created a leave type using multiples of 0.05 to the hour, the system was incorrectly calculating multiples when added in the leave request itself.
-Reported by Tim Johnstone

Missing title in periods grid
11737 - There was a title missing from the periods grid in the periods page. It was “Description”.
-Reported by Victoria Stephenson

Error when accessing client details
11783 – When accessing client details, users were seeing an input string error message.
-Reported by Victoria Stephenson

MODIFICATIONS

Fonts selected in px rather than pt
11794 - Fonts in draft fees narrative tab were showing in px (pixel) rather than pt (point). This was changed to be pt.
-Suggested by Adam Morgan and Tim Johnstone

Add work status to tasks
11785 - It was suggested that a work status be added to Tasks.
-Suggested by Steve Thornton

References to old tables
11763 - The tblStateJurisdiction table is an old table, reference to which was removed from some SP’s, but not all as access to this table for some clients is still needed.
-Suggested by Brad Podzius

BUILD 9.7.7562.26586

FIXES

Reverify message
11793 – The reverify message that appears after a period of inactivity was appearing too frequently.
-Reported by Martyn Smith on behalf of Dragon Argent

Draft bills can be bulk confirmed without submitting or approving
11801 – The bulk confirm action within the Drafts As portfolios was available without the draft bill being submitted or approved.
-Reported by Janet Zesut

VAT/ Tax amount on Narrative tab
11802 – The VAT/ Tax amount on the narrative tab of a bill was not rounding correctly.
-Reported by James Arthur

Bills can be queued multiple times within Bulk Bill Printing
11803 – Clicking the generate button on the Bulk Bill Printing screen allowed ungenerated bills to be queued multiple times for printing
-Reported by Janet Zesut

Error message shown when submitting a claim but not when in a receipt
11804 – The minimum length for the supplier was being ignored when adding a receipt to a claim. It was being checked when submitting the claim, but the check should be displayed when adding the receipt.
-Reported by Vicky Stephenson

Client Contact email address not displaying on the Client Details Dashlet
11949 – The Client Details dashlet was not displaying the Client Contact email address
-Reported by Martyn Smith on behalf of Crowthers

Staff Budgets Portfolio
11951 – The Year selector on the Staff Budgets Portfolio was defaulting to the first in the list rather than the current year
-Reported by Michelle Harris on behalf of Grimbleby Coleman

Filtered Data and Data export options not working from the billing portfolio
11953 – The data and filtered data export options were not working from the billing portfolio
-Reported by Brad Podzius

Billing Guides
11958 – Internal notes and Out of Scope reasons were not being displayed on the Service Partner/ Manager and Job Partner/ Manager and In Charge billing guides
-Reported by Brad Podzius

Removing JobStatusUpdate permission doesn't restrict access
11960 – Removing the JobStatusUpdate permission was not controlling the ability to update the Job Status. This has been rectified.
-Reported by Melissa Seehorn on behalf of Geffen Mesher (30350)

Recurring Bills – [PostMonth] placeholder
11970 – The recurring fee placeholder displayed in the interface showed [PostMonth] rather than [PostMth] so this placeholder wasn't working
-Reported by Janet Zesut

Clicking No on Release All
11979 – Clicking No on Release All within timesheets was posting the time.
-Reported by Janet Zesut

Staff Work Profiles
11987/ 11989 – Adding a work profile was displaying the data incorrectly.
-Reported by Vicky Stephenson

MODIFICATIONS

Allow bulk confirming of zero bills
11842 – It was not possible to select multiple zero bills from the Draft As portfolios to allow for bulk confirmation. This now available.
-Suggested by Janet Zesut

BUILD 9.7.7578.26475

FIXES

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)

Department Diary defaults to wrong month
11957 – The month drop down on the department diary was defaulting to a month that was neither the current month or period.
-Reported by Michelle Jenkins

Interest/ Finance Charge reversals
11980 – An error was being produced when reversing an interest/ finance charge
-Reported by Brad Podzius

Starting a timesheet timer from the client dashboard
11982 – Starting a timesheet timer from the client dashboard was causing the timer to start at -6s. This was also happening when starting a timer from the Job Details.
-Reported by Vicky Stephenson

Internal Email Failures
11986 – Failures were occurring when emailing items internally
-Reported by Ricky Siu on behalf of Roth

Workflow Portfolio reports
11988 – Reports were not being generated when run from the Workflow Portfolio
-Reported by Vicky Stephenson

Periodic Leave Accrual
11993 – Leave accruals that were calculated on a periodic(monthly) basis were calculating incorrectly
-Reported by Ricky Siu

Data and Filtered Data options not working from the Job Status Summary Portfolio
11994 – The Data and Filtered Data export options were not returning any data from the Job Status Summary Portfolio
-Reported by James Arthur on behalf of Crowthers (30889)

Unable to overtype a job name within Prospects
11998 – If the generated job name on an opportunity was manually edited and saved, the changed were not persisted.
-Reported by Tim Johnstone

WIP was not being recalculated when changing lines from Progress to Interim in the underlying tables
11999 – When a Progress line of WIP was edited with the amount being changed and the billing type being changed from Progress to Interim, the amount in tblTran_Draft_WIP_AllocSum was not being recalculated.
-Reported by Michelle Jenkins

Recurring Receipt filters within Billing Admin not being applied to the report
12051 – The filters that are used on the recurring receipt generation page within Billing Administration were not being applied to the report that is available from the page
-Reported by James Arthur on behalf of Crowthers (30925)

Write Off reason reverting to first in list when navigating away from Analysis tab
12052 – The Write Off reason drop down was reverting to the first reason in the drop down list when the user navigated away to the narrative tab and back to the analysis tab.
-Reported by Michelle Jenkins on behalf of Crowthers (31010)

Jobs grids not refreshing to show updated service and client staffing changes
12054 – The jobs grids were not refreshing to display the updated staffing changes.
-Reported by Michelle White on behalf of LaPorte

Closed Jobs available when adding an Interim Bill to a draft bill
12070 – Closed jobs were being displayed when adding an interim bill line within a draft bill.
-Reported by Brad Podzius

Bulk Bill Emailing
12072 – An error was being generated when using the BCC address whilst bulk emailing bills
-Reported by David Kelso

Email wording formatting for bulk bills
12074 – When sending bulk bill emails the email wording body was rendering with all the HTML tags showing.
-Reported by Ricky Siu

Weekly Timesheet Print layout
12075 – The Approved by option was removed from the Weekly Timesheet Print
-Reported by James Arthur

Rich Text formatting on bill printing
12076 – Changes were made to the master copies of the sp's that handled the bulk bill printing to correct when there is no default font set.
-Reported by Tim Johnstone

Reapplying job template gets roles wrong
12078 – Job roles were not being correctly applied when a job template was reapplied to jobs
-Reported by James Arthur

Auto Allocate in draft bills causing some rounding issues
12096 – The add and auto allocate function within the draft bill was causing some rounding issues when billing more than is in current WIP.
-Reported by Michelle White

Others timesheets moves week start date forward 1 week
12101 – When opening the Others timesheet refiner and there was no staff selected the default week start date is moving forward to the next week.
-Reported by Janet Zesut

MODIFICATIONS

Dialogs and pages should display the relevant client and job where possible
11961 – All pages and dialogs have been updated to display the relevant client and job where possible.
-Requested by CBIZ

Notes button on jurisdictions should open another browser or pop up screen
11962 – The notes button on the jurisdiction page has been changed to open another browser window or pop up screen.
-Requested by CBIZ

Add a unique reference to the original job note
11963 – A note number has been added to the original note on jobs.
-Requested by CBIZ

Modify Drafts As Owner portfolio to display additional owner types
11964 – The Drafts As Owner portfolios have had Service Partner, Service Manager, Service In Charge, Job Partner, Job Manager and Job In Charge added as owner types. The list of drafts will filter based on the selection made.
-Requested by Janet Zesut

Display WIP within the Analysis tab of bills for all allocation types
11965 – The Analysis tab of a bill will now display the included WIP for all allocation types. Only jobs with an allocation type of Manual per bill can be edited within the draft bill.
-Requested by Janet Zesut

Bulk approve options on the Approval portfolios
11967 – A Bulk Approve option has been added to the Approval portfolios within the billing portfolio.
-Requested by Janet Zesut

Recurring Bills connected to jobs that are rolled over
11968 – An update has been made to update any recurring bills connected to closed jobs that are rolled over or when rolled jobs are closed.
-Requested by Janet Zesut

Job Billing Value column
11969 – A Job Billing Value column has been added to the Job Owner, Job Billing and Drafts portfolios
-Requested by Janet Zesut

Foreign Keys added to Email Queue tables
11981 – Foreign keys have been added to the Email Queue tables.
-Requested by Tim Johnstone

BUILD 9.7.7591.25870

FIXES

Collapsed narrative panels won't re-expand
12071 - The narrative sections on the bill wizard would not re-expand after they had been collapsed.
-Reported by Brad Podzius

List of entries at bill confirmation showing wrong value
12069 - The list of receipt or retainer entries that can be allocated during the confirmation process of billing were showing the totals rather than the outstanding values..
-Reported by Mike Francis

Jobs showing with an incorrect billing type
12107 - Jobs that had a billing type of recurring were being displayed as Manual within the job grids.
-Reported by Vicky Stephenson

Update Partner/ Manager – Export data not exporting
12115 - The Export Data and Filtered Data option on the Update Partner/ Manager page was not exporting anything.
-Reported by Vicky Stephenson

Billing Portfolio – checkboxes on WIP by Service Owner/ Job Owner
12118, 12119 - The Select All on both the WIP by Service Owner and Job Owner was not selecting all lines, only the top line.
-Reported by Janet Zesut

Billing portfolio – Clear selected items when changing view
12120 - When changing the View By within the Billing Portfolio, any checked lines need to be cleared.
-Reported by Janet Zesut

Emailing a single fee regenerates the PDF
12162 - Emailing a single fee from the Client DRS/ AR transactions regenerates the PDF rather than using the stored blob
-Reported by Adam Morgan

Redis Cache issues
12209 - The Staff Out of Office page was creating new connections to the Redis Cache causing issues.
-Reported by Tim Johnstone

MODIFICATIONS

Add an organisation setting to control default behaviour for C/F or W/O
11966 – An Organisation level setting has been added to the Billing Administration Settings page to control the default behaviour for C/F and W/O within the billing wizard Analysis tab. This will change the default behaviour when first drafting a bill, however, once a user has changed the selection their choice will be remembered when drafting further bills until the cache is cleared.
-Requested by Janet Zesut

BUILD 9.7.7605.20848

FIXES

Difference in timestamp recorded in History and Notes on jobs
12188 - There was a difference in the recording of the timestamp between the History tab and Notes on a job.
-Reported by Racheal Eduzor on behalf of Hogan Taylor (31271)

Client details not allowing a / in the client name
12189 - The ability to use a / in the client name was removed in a prior version as it was causing issues when searching for client. However this is required for many US client names. This constraint has been removed
-Reported by Brad Podzius on behalf of Grimbleby Coleman

Error when creating simple tax jobs from templates that have no tasks
12194 - An error was produced when creating simple tax jobs from templates that did not include tasks.
-Reported by Brad Podzius

Amounts not matching on Staff Productivity dashlet when drilled into
12196 - Chargeable values displayed on the Staff Productivity dashlet were not matching the values that were displayed when drilling into the figures.
-Reported by Melissa Seehorn on behalf of Honkamp (31400)

Job History sort order
12217 – The Job History on jobs was being sorted oldest to latest. This has been reversed.
-Reported by Shazil Quadri on behalf of TSS

WIP Allocation on Interim Bills
12235 - The WIP allocation calculation was changed in 9.6 to include interim bills. 9.7 has been changed to use the same calculation.
-Reported by Janet Zesut

Job Rollover not copying budget
12236 - When the budget type was set to ‘By Role In Total’ the budgets were not being rolled over to the new job.
-Reported by Brad Podzius

Leave Request approval checking incorrect permission
12251 - The Leave Approval page was using the incorrect permission and was only accessible if the user had access to the Global Leave Approval permission (LeaveReqAppList) rather than the permission LeaveReqApp.
-Reported by Janet Zesut

Constraint in tblClientServices causing issues in the Billing guide
12254 - Having certain reserved characters in the service code was breaking the billing guide report. A database constraint has been added to stop services being created with bad characters in.
-Reported by Tim Johnstone

Billing Guide SP error
12227 - Date ranges were fixed to be between dates, not less than or more than.
-Reported by Tim Johnstone

Timers started on complete or posted entries weren't working as expected
12279 - If a user started a timer on an entry that was posted or complete, by opening it up in panel view and starting the timer on "today", the existing completed/posted entry was hidden and a new entry with no details and just a timer running was displayed. This was changed to create this 'mirror' entry in it's own right, so users will now see this entry created as a separate entry in the grid with a timer running, along with the original completed/posted entry in the grid.
-Reported by Victoria Stephenson

BUILD 9.7.7625.24325

FIXES

Update tblSystem Change Log
12187 - An update to the SP for tblSystemSPChangeLog was required.
-Reported by Brad Podzius

Leave Cancellation permission not working Log
12297 - An update to the SP for tblSystemSPChangeLog was required.
-Reported by Vicky Stephenson

Recurring Bill Pre List
12298 - The sp that runs the Recurring Bill Pre list required an update to include the new bill narrative details.
-Reported by Janet Zesut

Scheduling macros
12299 - Scheduled macros were not always emailing the reports.
-Reported by Ben Edwards

Migrate logins
12300 - The function that migrates logins from the old portal database (v7 and V8) into V9 was not configured correctly. This has been updated.
-Reported by Ben Edwards

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)

Error when new bills are generated and the bill should be emailed to the DMS
12374 - An error was being generated when a new bill was drafted. The DMS setting was not populating the From address for the email.
-Reported by Ben Edwards

Macros ignoring Client SP's and producing blank reports
12376 - The macro function was only calling the standard sp rather than checking for any client sp's that may be in use. The result was that blank reports were being produced.

-Reported by Adam Morgan

View Contact button missing
12377 - Prior versions had a View Contact button on the Contact tab of Client Details. This was missed when the page was updated. This has now been restored.
-Reported by Michelle Jenkins

Billing WIP allocation was incorrect on negative WIP balances
12378 - The system was incorrectly calculating the WIP allocation in the situation where a job had outstanding WIP on multiple staff and an Interim bill for an amount greater than the total of the Staff WIP causing a negative WIP balance. When the job was billed the initial allocation on some staff showed a carry forward figure rather than 0.
-Reported by Andrew Hambly

Starting a timer in the evening in the US
12190 - Starting a timer within timesheets in the evening for US customers put the timer entry onto the next day. This was due to differences between the server time and the PC time.
-Reported by Melissa Seehorn on behalf of Honkamp (31341)

MODIFICATIONS

Performance improvements to Job Portfolio screens and the Staff Jobs dashlet
12317 - Various SP's have been tuned to improve the Staff Jobs dashlet and the Job Portfolio screens.
-Requested by Tim Johnstone

BUILD 9.7.7635.31213

FIXES

Editing submitted bills can be can be confirmed on screen with different Analysis and Narrative amounts
12408 - The Confirm action was not policy checking an edited bill that had previously been submitted. The bill failed the confirmation, but the user was not aware until they received an email stating that the confirmation failed. This has been updated to run the policy check on both the Submit action and the Confirm action.
-Reported by Brad Podzius

Zero Bill WIP allocation was incorrect on negative WIP balances
12409 - The system was incorrectly calculating the WIP allocation on Zero Bills where the job being zero billed had a negative WIP balance.
-Reported by Janet Zesut

Auto Allocate in bills with negative WIP balances
12411 - On bills where the job being billed had a mixture of positive and negative balances, the auto allocate was not allocating the negative amounts correctly.
-Reported by Janet Zesut

Timers causing issues with some analysis codes

12422 - In circumstance where an activity (chargeable) analysis code had a rate multiplier of 0%, starting a timer from the grid was causing a chargeable value to be calculated against the entry.

-Reported by Martyn Smith on behalf of Dragon Argent (32532)

Having two bills for the same client and job at the same time changes the figures

12433 - The bill amount of the already existing bill was being set to the WIP amount of the new bill.

-Reported by Janet Zesut

MODIFICATIONS

Set the Email attachment on bills to include the client name and code when emailing to a DMS

12429 - The format of the attachment has been modified to be clientcode, clientname, invoice number and date.

-Requested by Ben Edwards

Disable the Create button on Change Orders until all fields have been completed

12430 - The Create button has been disabled until all fields on the change order have been completed

-Requested by Michelle Harris

Allow bills to have different WIP types on lines for the same job in a bill

12435 - For jobs that had both Time and Disbursement lines included in a bill, the WIP type on each line had to be the same. This was required for lines that were being final billed. A modification has been made to allow different WIP types against the same job when doing Interim or Progress billing.

-Requested by Janet Zesut

BUILD 9.7.7649.21139

FIXES

Client DRS Transactions print displaying report date in US format

12444 - The Client DRS Transactions print report was displaying a reported printed date in US format.

-Reported by Vicky Stephenson

Client and Service partner fields not being populated on rolled jobs.

12445 - The Client Partner and Service Partner fields were not being populated on rolled jobs.

-Reported by Janet Zesut

Pop Up calendar partially hidden on Dates panel in Jobs

12455 - The pop up calendar was partially hidden when entering target dates in the full job view.

-Reported by Lucy Meira

Final Scheduled bills not always being triggered
12458 - The final scheduled bill was not always being triggered if some scheduled bills were being missed.
-Reported by Steve Thornton

Unable to select a default job within Client Monies
12459 - It was not possible to select the default generic job within the client monies bank accounts.
-Reported by Michelle Jenkins on behalf of Lubbock Fine

Users could change bill amounts on bills created from Based on Job billing types
12462 - Bills raised from Based on Job billing types use the job billing value as the bill value. This cannot be changed. It was found that by drilling into the WIP on the bill, the amounts on the individual entries could be changed. This caused problems as the bill was out of balance.
-Reported by Michelle Harris

Scheduled bills that use a task trigger require too many tasks
12464 - Scheduled bills that are triggered by task were requiring the same number of tasks as bills in the schedule. This was incorrect as the final bill is likely to be on task completion and therefore the schedule requires at least 1 less task.
-Reported by Andrew Hambly

Job Budget hours column is rounding to full hours
12477 - The Job Budget column was rounding values to full hours rather than showing any decimal places that budgets had been entered in.
-Reported by Ricky Siu

Importing Job Budgets
12478 - Importing job budgets to actuals was zeroing out the budget rather than importing the actuals from the prior job.
-Reported by Ricky Siu

MODIFICATIONS

Add AutoClose to external links
12476 - Some external links that open a document require the window that is opened to be closed once the document is downloaded. An autoclose has been added to close the new window automatically after a few seconds.
-Requested by Ricky Siu

BUILD 9.7.7676.23050

FIXES

Default C/F or W/O setting when billing
12481 - The Organisation setting within Billing Administration that controls the default behaviour of C/F or W/O in a bill was not being applied.
-Reported by Janet Zesut on behalf of LaPorte

Report Parameter Order not being applied
12491 - Report parameters were not being displayed in the order set on the parameter set up.
-Reported by James Arthur

Zero Bill confirmation attempting to email zero bills
12493 - The system was attempting to email Zero Bills on confirmation and failing. The Print option has now been removed when confirming Zero Bills. If Zero bills need to be printed it can be achieved from the WIP Transactions.
-Reported by Vicky Stephenson

Data Button not working from the Client WIP Print tab
12495 - The Data button was not producing the CSV file when attempting to export the Billing Guide information.
-Reported by James Arthur on behalf of Milsted Langdon (32963)

Error when trying to email the Billing Guide
12496 - An error was occurring when trying to email the billing guide from within the report.
-Reported by Melissa Seehorn on behalf of Grimbleby Coleman (32806)

Staff Details not using the correct Staff Grades category
12497 - The Staff Grade field on the Staff Details page was looking at the old Staff Levels category rather than the Staff Grades category.
-Reported by Steve Thornton

Transferring Out of Scope Time
12506 - Out of Scope time that was being transferred was losing the Out of Scope information.
-Reported by Janet Zesut on behalf of Sansiveri

RFP Receipts not reversing when a Cheque Payment to Client is created
12511 - The RFP Receipt was not being reversed when a Cheque Payment to Client was created against the original receipt.
-Reported by Michelle Jenkins on behalf of Milsted Langdon (32933)

Incorrect VAT calculations on bills when editing individual WIP lines
12518 - The VAT on the Narrative tab was not being recalculated correctly when the WIP on the analysis tab was being billed and allocated at the Staff, Task, Analysis or Role level.
-Reported by Michelle Jenkins on behalf of AAB (33232)

Editing a Draft Locked Bill
12532 - Editing a Locked Draft Bill displays a message asking if the user wants to edit the bill. This message was not being displayed correctly.
-Reported by Michelle Harris

Add Another Job or Client not displaying all WIP
12538 - The Add Another Job or Client functionality was not displaying all available WIP if there was both Time and Disbursements available.
-Reported by Michelle Harris

Removing individual entries on a bill
12544 - Removing individual WIP entries from a bill was causing the allocation to be calculated incorrectly.
-Reported by Michelle Harris

Error when trying to credit a partially paid bill
12545 - An error was being displayed when trying to credit a partially paid bill.
-Reported by Michelle Harris

BUILD 9.7.7690.26605

FIXES

Cannot access Keep In Touch settings
12514 - An error occurred when attempting to access the KIT settings category within Categories.
-Reported by Vicky Stephenson through QA Testing

Workflow status on a job closed via a Final Bill is not updated
12539 - Jobs that get closed during the final billing process were not having the workflow status updated to Complete.
-Reported by Michelle Harris through QA Testing

Unable to set a preferred connection
12540 - The Preferred checkbox was not being activated on an existing connection unless other changes were made to the relationship.
-Reported by Michelle Harris through QA Testing

Adding leave requests for multiple days
12543 - Adding a leave request for multiple days was unticking the All Day checkbox. If this was not spotted by a staff member the leave request was being submitted with 0 hours.
-Reported by Michelle Harris through QA Testing

Changing staff from placeholder to a different license type
12552 - The security account, that enables login was not being created when a placeholder licence was changed to another licence type.
-Reported by Melissa Seehorn

Standard Bill Paragraphs within Job Templates
12563 - Adding standard bill paragraphs within a job template was displaying an error.
-Reported by Melissa Seehorn on behalf of Honkamp. (33528)

Partial credit note allocation problem
12564 – The allocation was not being calculated correctly on a partial credit note if the original bill included a non time entry.
-Reported by Michelle Jenkins on behalf of Crowthers (33575)

MODIFICATION

Removal of Spell Checker on Staff Settings
12522 - The Spell Checker language setting on the Staff Settings page was only valid for Classic pages. This has now been removed as the number of classic pages remaining has made it redundant. The browser deals with the spellchecker language in all V9 Style pages.
-Reported by Vicky Stephenson through QA Testing

VAT Calculation changes
12565 - The VAT calculation has been changed to prevent rounding differences between the Analysis and Narrative tabs within the Billing Wizard. If a difference is identified between the VAT calculated on the Analysis on individual lines and the VAT calculated on the Narrative the difference will be spread evenly across all lines within the Analysis. VAT is calculated based on government legislation – VAT on entries up to .50 will round down and VAT on entries of .50 and above will round up.
-Requested by Michelle Harris and Andrew Hambly

Removal of VAT Override option within Billing Settings
12566 - The VAT Override option has been removed from the billing settings as any overrides were causing problems when confirming bills due to the VAT needing to be the same on both the Analysis and Narrative tabs.
-Requested by Michelle Harris and Andrew Hambly

BUILD 9.7.7717.18195

FIXES

Error when saving a report macro
12588 - An error was displayed when running report macros that included reports that made use of the Grouping, Sorting and Filtering options.
-Reported by Melissa Seehorn on behalf of Roth (33423)

Addition of multiple jobs to a bill creates an error message
12590 - An error was occurring when multiple jobs for the same client were being added to a draft fee (from the Add Clients option within the Analysis tab). This has been resolved.
-Reported by Janet Zesut

All option missing from Staff Budgets Portfolio
12600 - The All option on the Department and Office drop downs was not included when the Staff Budgets Portfolio was converted from Classic to V9. These are now available.
-Reported by Michelle Harris on behalf of Grimbleby Coleman

Client default layouts
12601 - The default billing layout set against a client was being ignored.
-Reported by Michelle Jenkins on behalf of AAB (33909)

Recurring Bills – Unable to add standard bill paragraphs
12634 - The Append button was not adding the selected standard bill paragraphs when adding narrative to line items.
-Reported by Melissa Seehorn on behalf of Grimbleby Coleman (34143)

Report macros – output to CSV
12669 - An error was occurring when setting the macro output to CSV
-Reported by Adam Morgan

BUILD 9.7.7738.27869

FIXES

Zero bills and negative non time entries
12653 - Negative non time entries were being allocated against outstanding WIP before any write offs were being done. This was causing issues when zero bills were being reversed and the WIP restored
-Reported by Crowthers (34252)

Modem field with Staff Details only allowing numeric characters
12661 - The modem field within the Staff Details pages was only allowing numeric characters after the rewrite from the classic page. This field previously allowed alpha numeric characters. The field has now been updated to allow alpha numeric characters as it was before.
-Reported by AAB (34440)

Rounding issue when raising a credit note for a partially paid bill.
12682 - A rounding issue between the Analysis and Narrative tab on a credit note was causing the confirmation of the credit note to fail.
-Reported by AAB (34521)

Report macro output to CSV displays an error
12669 - An error is displayed 'The stored Procedure RepSP doesn't exist' when outputting a macro line to CSV.

MODIFICATIONS

Add ability to set a password to PDF's when emailing
12654 - The ability to apply a password to emailed invoices, Credit Notes, Statements and RFP Receipts has been added. A Transaction Setting has been added to switch this functionality on or off. The password that will be applied is the client code. PDF's viewed within the system will not require a password.
-Reported by Crowthers

Add * icon to Credit Notes
12670 - A * icon has been added to the Analysis tab of Credit Notes to allowing the toggling of the values between the W/O and C/F fields.
-Reported by AAB

Add grouping to Add Removed WIP within the Billing Wizard
12726 - Grouping options have been added to the Add Removed WIP dialog within the Analysis tab of the Billing Wizard.
-Reported by AAB