RELEASE NOTES

PE Version: 5.2

Publication Date: 20/10/2020

PracticeEvolve™

Legal Practice Management Software

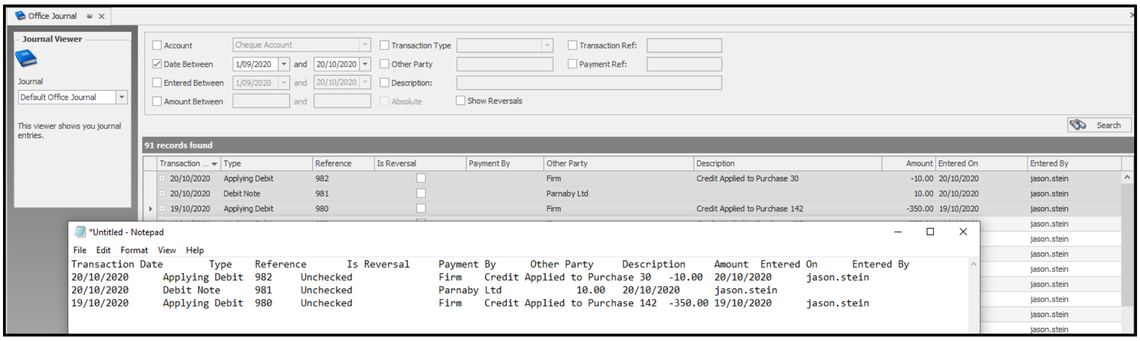
Table of Contents

Accounting features and enhancements

General accounts feature enhancements

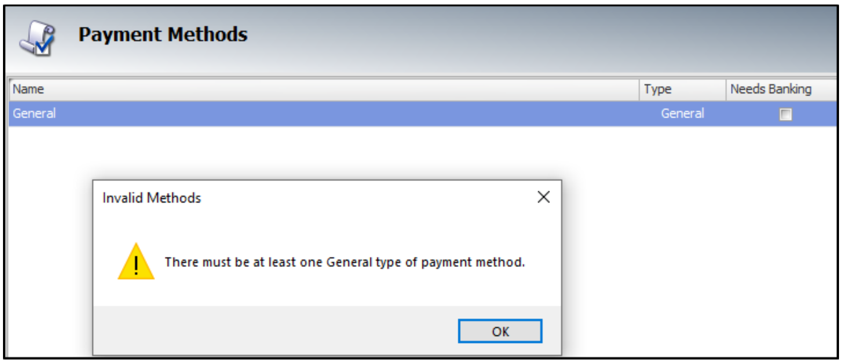
CRE-1387 | Allow ledger items in the office/trust journal screens to be added to clipboard

Ledger items in the journal screens can now be copied to the clipboard.



CRE-1390 | User should be prevented from saving payment options in accounting options when there is no General payment method

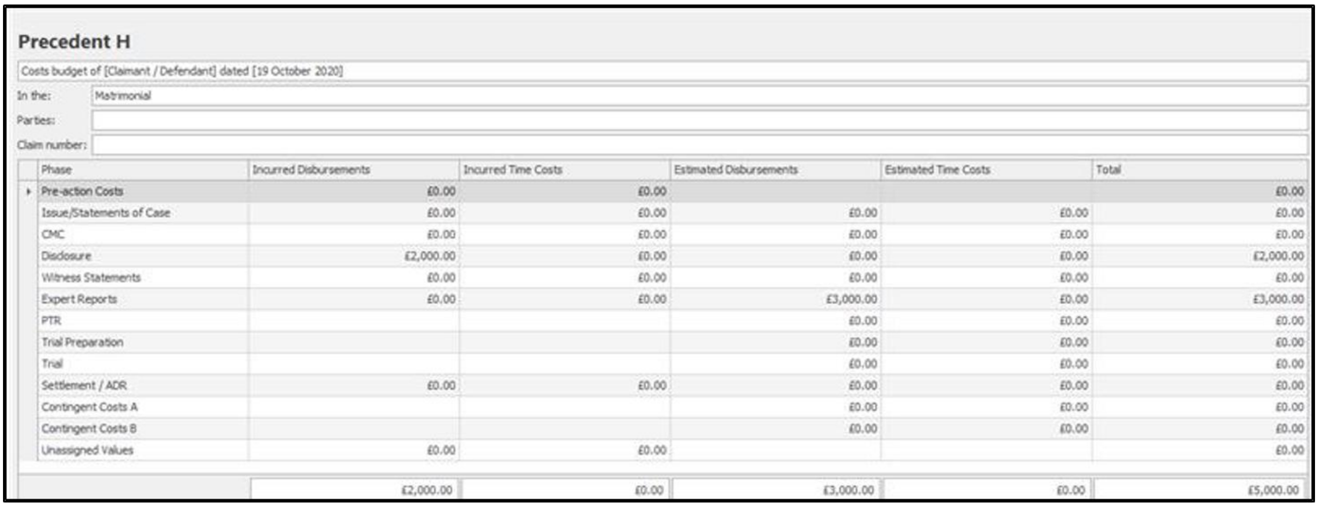
When the user attempts to remove the last “General “type of payment method they should get a very clear error message telling them not to remove the payment method.



Precedent H feature[1]

CRE-988 | Precedent H Generation

The Precedent H feature has been added to the PracticeEvolve UK module and is available to customers in that region. This will help users to prepare their Precedent H reports, by using an associated billing plan and billing grades


Precedent H

Costs budget of [Claimant / Defendant] dated [19 October 2020]

In the: Matrimonial

Parties:

Claim number:

Phase	Incurred Disbursements	Incurred Time Costs	Estimated Disbursements	Estimated Time Costs	Total
Pre-action Costs	£0.00	£0.00			£0.00
Issue/Statements of Case	£0.00	£0.00	£0.00	£0.00	£0.00
CMC	£0.00	£0.00	£0.00	£0.00	£0.00
Disclosure	£2,000.00	£0.00	£0.00	£0.00	£2,000.00
Witness Statements	£0.00	£0.00	£0.00	£0.00	£0.00
Expert Reports	£0.00	£0.00	£3,000.00	£0.00	£3,000.00
PTR			£0.00	£0.00	£0.00
Trial Preparation			£0.00	£0.00	£0.00
Trial			£0.00	£0.00	£0.00
Settlement / ADR	£0.00	£0.00	£0.00	£0.00	£0.00
Contingent Costs A			£0.00	£0.00	£0.00
Contingent Costs B			£0.00	£0.00	£0.00
Unassigned Values	£0.00	£0.00			£0.00
	£2,000.00	£0.00	£3,000.00	£0.00	£5,000.00

Billing Plans enhancements (for Precedent H)

CRE-101 | Add 'Billing Grade' as an option on the employee form and enable it in Billing Rates

Employees can now be set up with a Billing Grade. This is another dimension added to the Billing Rates matrix allowing rates to be set up by grade of employee, not just their job title. The new priority order is

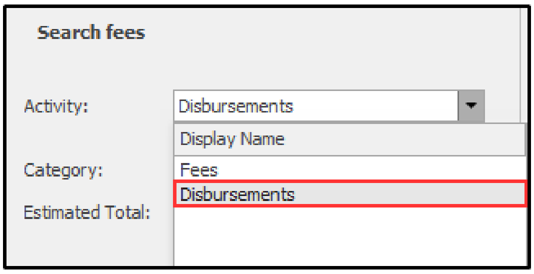
> *Task Type (if Prioritise Task Types is set) > Matter > Client > Task Type (if Prioritise Task Types is not set) > Employee > Billing Grade > Job title > Matter Category*

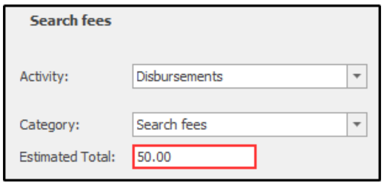
It is also now available in billing plans, and work done under a certain grade will be associated with the correct active billing plan task, if there is an associated billing grade.

[1] This feature is for clients in the UK. Some features have been implemented within the staged billing module and can be accessed by our clients world-wide.

CRE-109 | Add Estimated Disbursement to billing plans

Users can now add estimated disbursements to their billing plans.

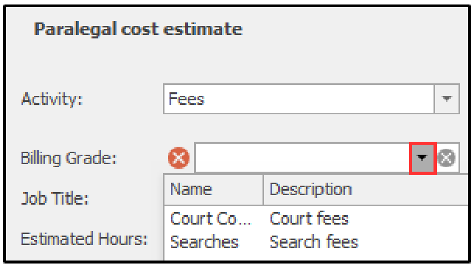




- *CRE-562 Ability to link disbursement categories to purchase*
- *CRE-563 | Ability to link disbursement categories to payment*
- *CRE-564 | Ability to link disbursement categories in the invoice*

CRE-760 | Include billing grade in the billing plans fee activity.

The fee type activity in the Billing Plan can now be set by Billing Grade, previously it could only be set by job title.



Case and document management features and enhancements

Archive Management

CRE-085 | Distributed archive versioning enhancements

Practice Evolve can now move documents associated with archived matters to a nominated secondary storage drive. This is set up with a configuration key on the server itself.

Please contact our team for assistance here: **support team.**

Forms designer

We have made various enhancements to our forms designer in version 5.1.

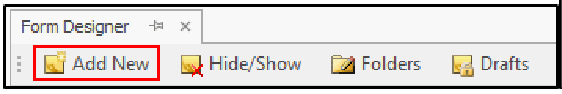
Users can create and update their own matters, tabs, fields, and tables. This includes resolving some previous issues with visual alignment, and the saving of the files. We have also built upon this to include a much more intuitive way of version control. Users will have the added benefit of being able to restore to an earlier save rather than starting over if they wish to revert. Additionally, a preview function will allow users to progressively inspect their changes without impacting the live environment

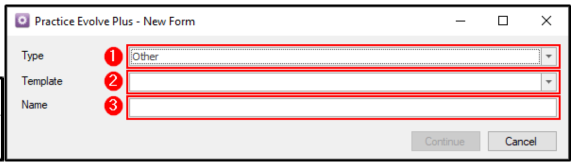
Our user guide has also been completely overhauled and is designed to cater for all skill-levels, whether you just want to add a field or two, with more technical instruction on calculating fields for those wanting to manage all forms customisations for your firm. Our guide is available on our support portal, here: https://support.practiceevolve.com/hc/en-us/articles/360001067716

Forms designer enhancements to form types and folders

CRE-0967 | Add a non-matter model to the system via the forms designer

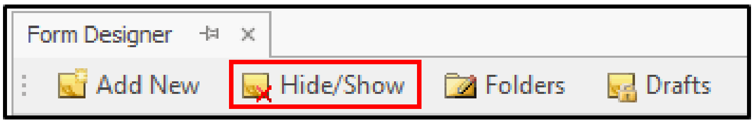
Users can now create new tables in the forms designer based on a blank template. This will allow them to make new tables for their other forms.





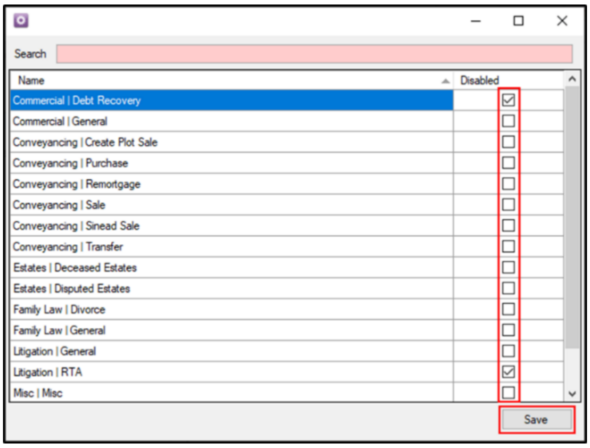
CRE-0972 | Allow user to hide and show matter types from forms designer

The forms designer now has a 'Hide\Show' button that allows users to turn matter types off and on.

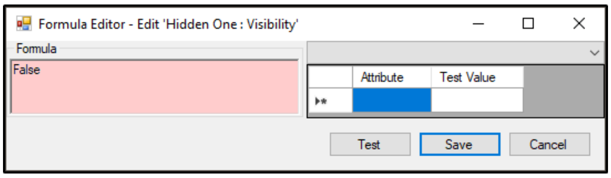


CRE-1667 | New forms are hidden by default when a new matter type is created

When creating new matter types in the forms designer they are now created as 'hidden' by default to allow the user to customise them before giving access to the rest of the firm.



Related: CRE-1594 Add a cancel button for Hide/Show screen



CRE-1584 | Add an option to customise the default folder profile for prospects

The default folders on a newly created Prospect can now be configured in the folder editor in the forms designer.

Forms designer enhancements to streamline your publication

There are four key enhancements to publishing forms:

1 Copy fields and tabs: the forms designer feature now has a 'Copy fields' list that allows users to copy fields inside the same form and to other forms. You can also copy whole tabs between forms in the forms designer.

2 Preview forms: the ability to preview forms before publishing them. The 'Preview' button enables you to view the form without publishing it, to test formulas and layouts.

3 Save draft forms: you now have the option to save your forms in draft, to be accessed and published later

4 Version control: modified forms and the option to revert to specific published versions of the form.

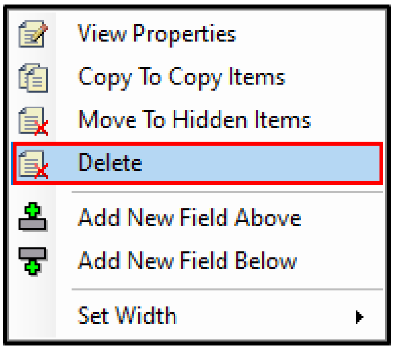
All items are listed below with screenshots where relevant.

CRE-956 | Warn of publishing empty tabs

User is now warned if they attempt to publish an empty tab, as this is not currently possible.

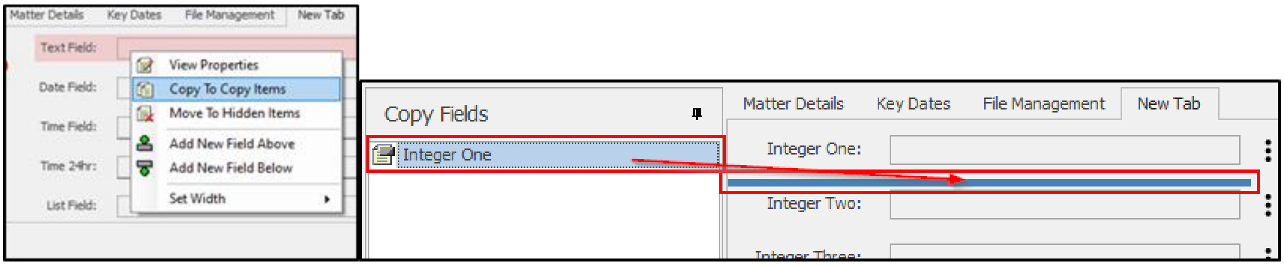
CRE-957 | User should be able to delete the newly added/unpublished fields

It is now possible to delete fields that have been added to a form if they have not been published yet.

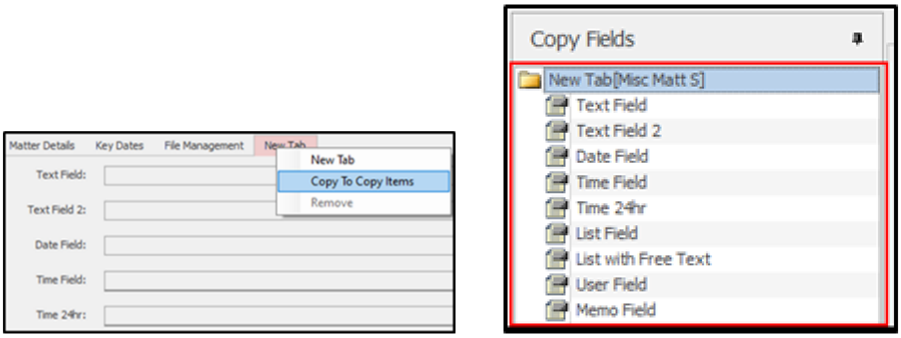


CRE-962 Ability to copy fields between models

The forms designer feature now has a 'Copy fields' list that allows users to copy fields inside the same form and to other forms.



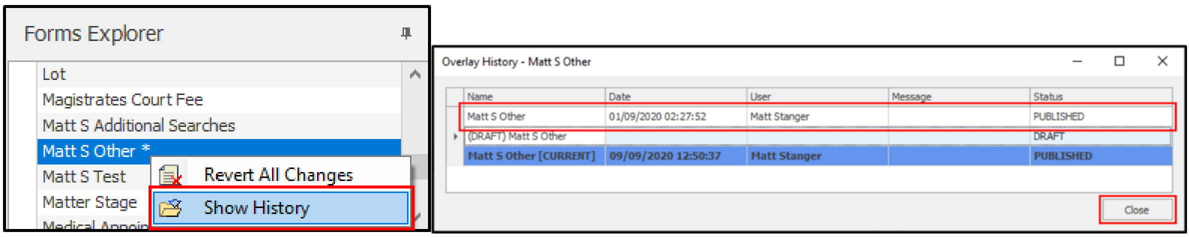
CRE-1209 Ability to copy tab between models



CRE-1208 | Save as draft feature for forms designer

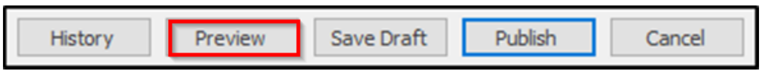
The ***Save Draft*** button enables you to save a draft version of a form to work on at a later stage.

CRE-1262 Users can now revert to specific published versions of the form



CRE-1356 |Allow user to preview draft forms before publishing them

The ***Preview*** button enables you to view the form without publishing it, to test formulas and layouts.



CRE-1646 | Warn users if model has no summary attributes

When publishing a table model the forms designer will confirm that the user has selected at least one field to display as a column and warn the user if they have failed to do so.

Forms designer enhancements to fields and tags

We have implemented several changes to the types of fields available within the forms designer. Including,

New attribute (field) types: we have added support for additional fields types, ***Hyperlink***, ***Time*** and a ***One-line table***

Additional field properties: you can now set whether an attribute (field) is audited, whether it should be reportable, and what colour it should be, from within the enhanced field editor properties screen.

You can also set the required height, who can access the field, or whether it should be read-only, and set date fields to automatically populate with the current (or a calculated date).

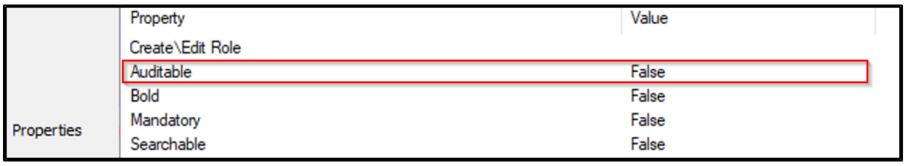
Usability enhancements for adding new fields: We have added an option to easily add fields above or below other fields,

CRE-661 | User should be able to add/edit elements of a list using forms designer

The list items of an existing list type field can now be edited in the forms designer.

CRE-664 | User should be able to set field attribute as auditable using forms designer

Users can now set a field as auditable in the forms designer feature. This will cause the field to display the 'audit' button after being saved.



CRE-954 | Users should be able to report on fields edited using forms designer

Fields created in the forms designer are now reportable in general reports by default.

CRE-0952 | Users should be able to delete tags from field properties screen

User created tags can be deleted in the forms designer.

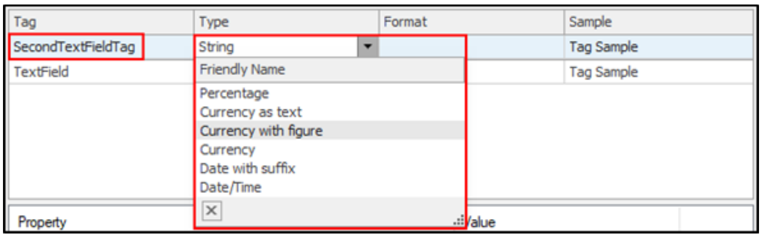
CRE-966 | Should open properties of a field on double-click

When a user double-clicks on a field in the forms designer the properties will open

CRE-983 | Ability for date field to have a full set of tags, not just datetime plus CRE-984 | Ability for currency field to have full set of tags.

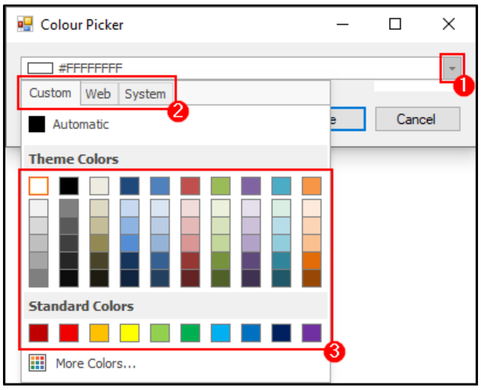
We have implemented enhancements to field tags usually requiring a set:

- Forms designer can now set up date type tags, users can create new custom types of date tag.
- Forms designer can now set up currency type tags.



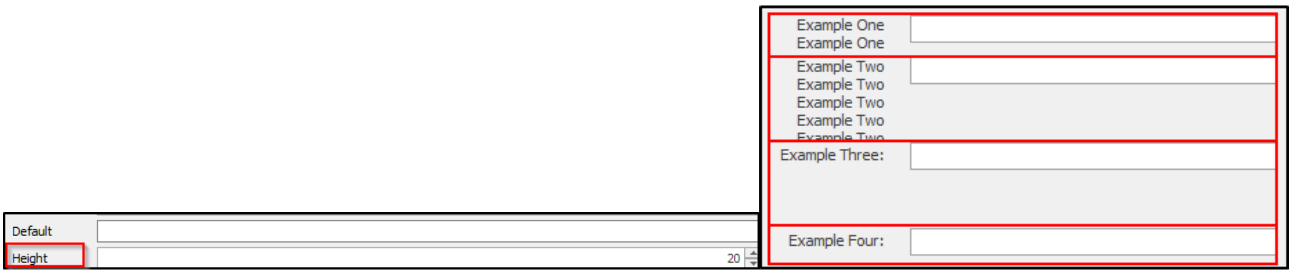
CRE-1213 | Support background colour for fields in the forms designer

Users can now set the back-colour on a field in the forms designer.



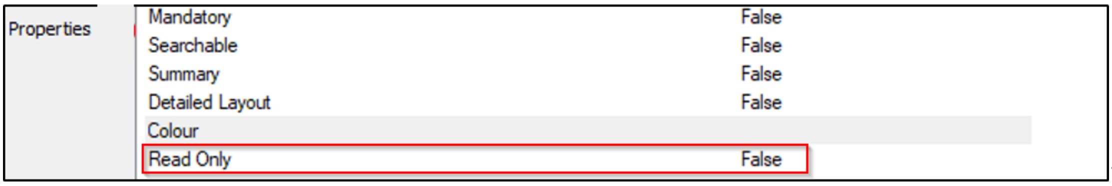
CRE-1493 | Allow user to set layout type on attributes in forms designer for extra spacing

Users can now set a field height in the field editor in the forms designer. This will insert extra whitespace below the field for most 1 row fields and set the actual height for memo boxes and tables. This is useful for field with large labels that need more white space.



CRE-1532 | Add a read-only setting in field properties

Users can now set a field as read-only in the forms designer. This will mean that nobody can edit that field in the front end, which is useful for fields that are updated by a workflow.



- **Related: CRE-1616 Fields with calculation should be bound to read-only**
  If a field has a calculation set, read-only will be set to true by the system.

CRE-1537 | Allow option for date field to auto populate with today's date

Users can now set a date type field to automatically populate with the date they were created using the flag 'Autopopulate Date' in the properties section of the field editor in the forms designer.

CRE-1541 | Add decimal option to available attribute types

Users can now add a decimal type field to forms in the forms designer. This is a field that shows a value like "1.45". The number of decimal places shown is customisable **but only until the field is published.**

CRE-1539 | Attribute editor terminology change

Some items within the attribute editor have been renamed, as follows:

Before 5.2	New
In the attribute type list:	
Collection →	→Table
Number →	→Integer
In the attribute formulas editor:	
Formatting→	→Calculation
In the tab right click menu:	
New Tab →	→New Attribute Group

CRE-1543 | Add a one-line table attribute type

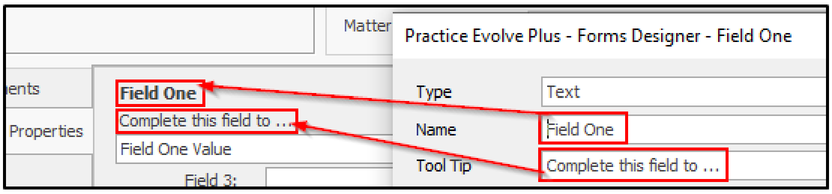
Users can now add a one-line table link in the forms designer. These tables appear as a single row in the UI and are useful where there is only ever going to be one item of the table type being added to the parent form.

CRE-1544 | Add hyperlink type attribute

Hyperlink type fields can now be created in the forms designer. These are fields that when clicked open a website as set up by the user.

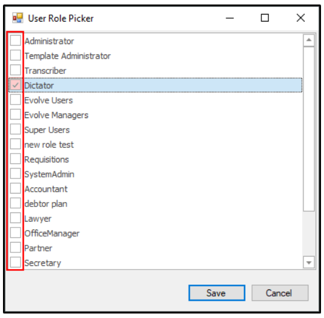
CRE-1561 | Add a detailed layout per field

Users can now toggle a detailed layout per field in the forms designer. Detailed layout takes the standard field presentation and rather than the Tool Tip displaying as a pop-up it's included as part of the main form layout.



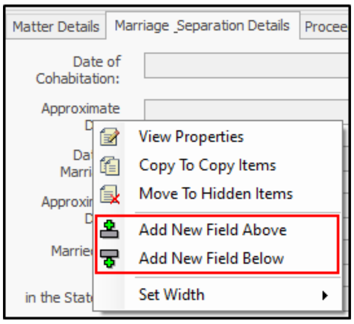
CRE-1570 |Allow user to set the permission to create or edit a field in the forms designer

Users can now set the user roles that can edit a field in the forms designer.



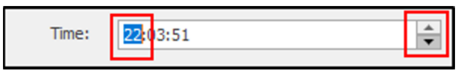
CRE-1582 | Allow user to add a new field above or below an existing row in forms designer

Users can now right click on an existing field to add a new field above or below it in the forms designer.



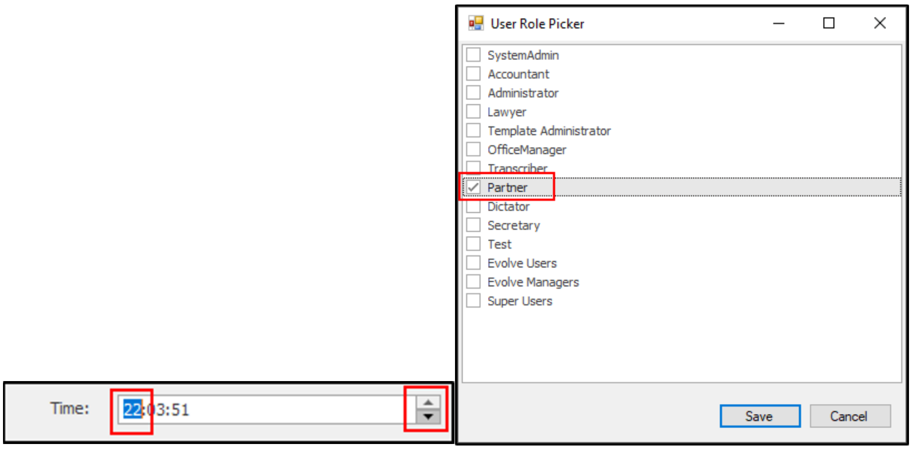
CRE-1585 | Add a new *Time* field type

Users can now create time type fields in the forms designer.



CRE-1726 | Limit the users available for selection in a user type field by user role

The user type field can now have a user role filter set on it that will restrict the selection of users to just those with the role.



Forms designer enhancements to formulas

CRE-1034 | Formula field in forms builder not currently aware of user created attributes until a restart

Formula editor in the field editor in the forms designer can now reference fields that have not yet been published.

CRE-1620 | Clear should only apply to selected value

The clear button in the formula section of the field editor in the forms designer now only clears the selected tab, visibility or calculation. Previously it cleared both at the same time.

CRE-1621 | ‘Same As' should only inherit the value of the tab you have selected

The same as drop down in the field editor in the forms designer now only inserts a formula to the selected tab, visibility or calculation. Previously it set both at the same time.

Forms designer general UI enhancements

CRE-053 | Abstract schemas should not be visible in front end

Forms that are unavailable for editing, such as the matter base, are no longer visible within the forms explorer

CRE-1595 | Add a cancel button for the folder editor

Cancel button added to the default folder setup screen in the forms designer.

CRE-1597 | Add a close button to exit the forms designer

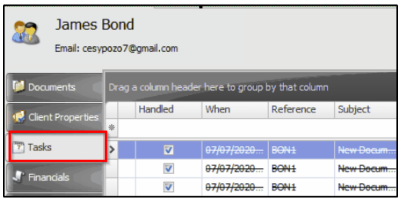
Close button added to the forms designer feature

- Related: CRE1644 Request user confirmation to exit forms designer: User is now warned when exiting the forms designer to confirm that they wish to do so.

Tasks

CRE-1397 | Add the tasks tab to clients

Task tab is now available on the client card.

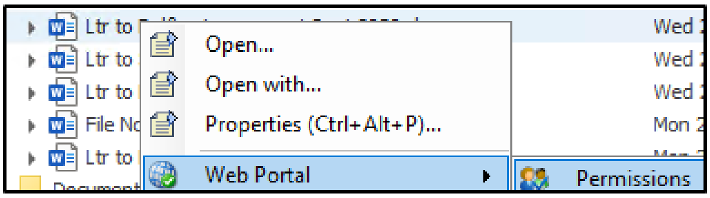


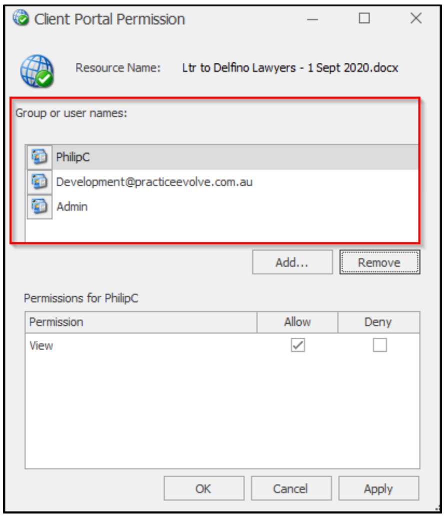
Web-Portal enhancements

Our updated user guide is available here: https://support.practiceevolve.com/hc/en-us/articles/360001136515

CRE-1466 | Portal document sharing permissions

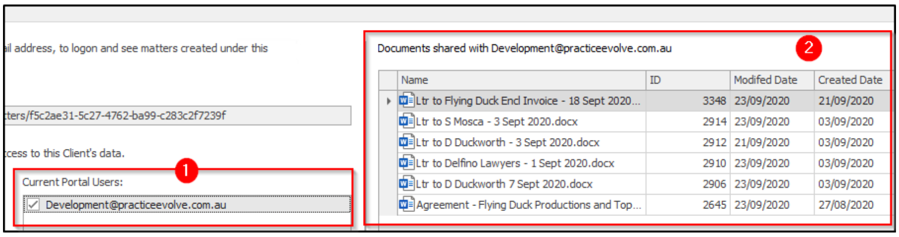
Sharing of documents to the web portal can now be done in bulk, and recipients limited by permissions. Users can set up which invited portal users can see which shared document on a document by document and user by user basis. For example, a document can be shared with just an invited barrister, and not the invited client.





CRE-1566 |Show documents associated with the shared user on the portal

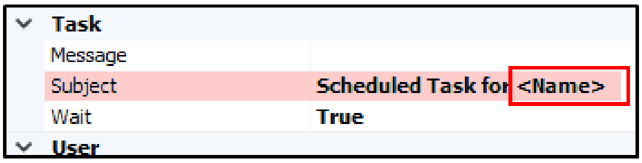
The web portal tab now displays users and their shared documents along with basic properties



Workflow enhancements

CRE-1459 | Support lookup of the parent object when finding a user attribute within a workflow foreach loop

As tasks created in a Foreach loop may be created for multiple records in the workflow, you can now reference the matter the table is in by bringing identifying fields into the subject as follows:

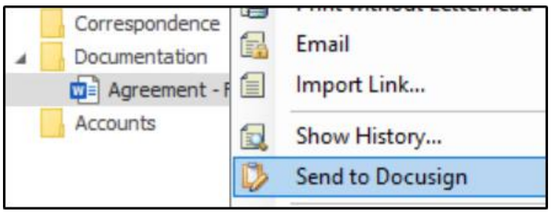


Integration partners

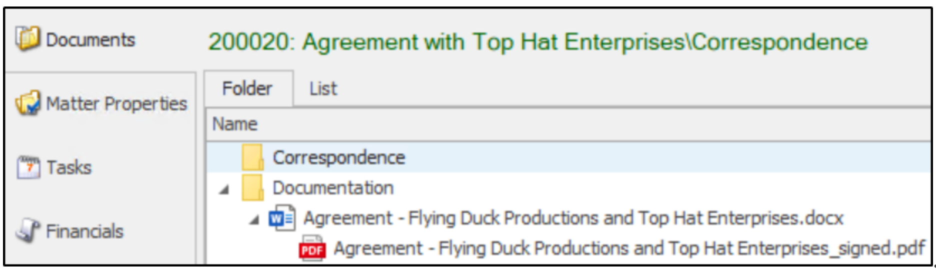
CRE-540 | DocuSign integration

Our user guide is available here: https://support.practiceevolve.com/hc/en-us/articles/360001954356

The integration will allow our system to easily send a document with details about the recipient to the DocuSign platform, which will then distribute and compile the final completed document.



The final completed document will be automatically brought back into the system as a new document, linked to the original, and users notified:



5.2 Resolved issues

Accounting

CRE-537 | Fee Earner Report Data doesn't match with Time Sheet Report Data

Fixed issue with Time Sheet Report so that it will match with Fee Earner Report data.

- Related CRE-493 Timesheet summary report is not taking ReversesID into account when calculating units
  Time is now calculated correctly for timesheet summary report.

CRE-795 | Save user added columns in payments and purchase screen

Payment and purchase screens will now save their column settings between sessions.

CRE-1410 | Disappearing matter column from main record purchase screen after matter disbursement record purchase screen closed.

Fixed issue where matter column was disappearing from the main record purchase screen after matter disbursement record purchase screen closed.

CRE-1046 | General ledger report timing out on cash basis

Enhanced the performance of the General Ledger Report when run on a cash basis

CRE-1364 | Null reference exception when trying to export ABA

The Export File option in Prepare EFT should show a list of available export forms without errors.

CRE-1372 | The Fee Earner WIP Review report does not run when the "Adjust Fee Earner Budget for leave" option is ticked

Report now runs correctly when the "Adjust Fee Earner Budget for leave" option is ticked.

CRE-1380 | Unable to create users with the same name as a previously deleted user

Fixed issue preventing creation of new users with the same name as a previously deleted user.

CRE-1414 | Australian ABA file appearing incorrectly in dropdown as NAB NAI

Fixed issue where Australian ABA file was incorrectly displaying as NAB NAI in the bank file import selection dropdown.

CRE-1415 | Disbursements recorded in opening balances do not import

A disbursement entered the Set Opening Balances screen should be imported correctly

CRE-1420 | Improve support for BACS and RBS bank transaction import formats

Importing bank transactions as BACS or RBS file formats should work correctly

CRE-1421 | The Hide Apply Credits checkbox on the Irish matter ledger view does not work

The "Hide apply credits" checkbox now functions correctly

CRE-1450 | Aged debtors report not filtering division

Users can run aged debtors report and filter correctly by division

CRE-1467 | Trust cheque number increasing after error

Stopped the automatic cheque number incrementing when the screen fails to complete the transaction due to some error. (E.g. missing data)

CRE-1470 | Task type billing rates fail to be recognised

The "prioritise task type rates" checkbox now works correctly, and rates appear as options in the dropdown on the timesheet screen.

CRE-1472 | Import budgets for employees clears out prior year budgets

Stopped previous budgets being cleared when issue where importing fee earner budgets in a new financial year.

Case & document management

CRE-0982 | The recently used matters and recently used client list does not differentiate between live and staging

The system will now keep some settings separate between different installations of the client application. For example, if you have a Staging (blue) client and a Production (purple) client on the same machine, the connection string, and the recently used matters and clients list will be kept separately for both.

CRE-1035 | Unable to remove, move or hide blank component from forms designer

Removed the concept of blank components in the forms designer. Fields now have a width, and the width can be set by the user by right clicking on the field.

CRE-1409 | The Diary - Tasks view does not maintain column layout changes

Fixed issue where diary column settings were not being saved correctly.

CRE-1426 | Error when checking-out a document using the Excel add-in

Resolved error with Excel add-in on check-out

CRE-1429 | An error is thrown when a user selects the add-in option 'File As' in an edited document that is not checked out

Users should be able to "File As" from non-checked out word document after edits have been made

CRE-1447 | Archived Clients list not loading when expanded

When expanding the Archived Clients tree, all archived clients should be expanded by default

CRE-1449 | Some workflows may not execute correctly due to the full model name not being saved in the database

Run workflows on models with names greater than 20 characters in length (now up to a max of 100 characters)

CRE-1456 | When running a general report on client created dates, no results are returned in some scenarios due to time zone conversion

Fixed issue with general reports not localising dates properly which was causing some dates to incorrectly be treated as the day before or after, depending on the user's region settings.

CRE-1473 | When creating a child matter, the Practice Explorer shows the child matter at parent level

Fixed issue with child matters not displaying correctly in the Practice Explorer bar when first created.

CRE-1538 | Cannot drag and drop a hidden field back into the form if it 'already exists' in forms designer

Fixed issue preventing hidden fields from being made visible on the form.

Related forms designer items

- Related: CRE-0579 Drag and drop in forms designer fails to update in specific circumstances
- Related: CRE-1261 Overlay behaviour issue
- Related: CRE-1326 Moving fields via drag and drop shows different layout between form designer and actual input screen
- Related: CRE-1528 Tab not saving correctly after being moved
- Related CRE-1578 Field goes missing after drag drop

CRE-1540 | Cannot set 'same as' in attribute editor back to blank in forms designer

Users can now clear the value in the calculation and visibility tabs in the formula editor of the field editor in the forms designer. The Clear button will clear the contents of the Visibility and Calculation fields, before doing so, you will be asked to confirm your action.

CRE-1601 | Aspose update to prevent Excel preview causing memory leaks

Infrastructure update where rogue excel files caused system performance issues when being previewed.

CRE-1654| Forms designer field tags created should not be space separated

Tags automatically generated by the field edit form will remove any internal spaces, to maintain consistency with PracticeEvolve form design standards.