

Project Summary Specification

Practice Manager v8.7 SP3

Created on March 4, 2003
by Thomas A. Foley

Revision No. 19

Last Saved on March 4, 2003
By Thomas A. Foley

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sp3_pss_v0100.doc

RealLegal

Practice Manager™

Project Summary Specification • Practice Manager v8.7 SP3

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Sign-off

Name/Title	Mark Mitchell
Signature/Date	
	<input type="checkbox"/> Prepared By <input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Rick Huszagh
Signature/Date	
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Comments	

Name/Title	Susan Huszagh
Signature/Date	
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Comments	

Name/Title	Cynthia Hobday
Signature/Date	
	<input type="checkbox"/> Prepared By <input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Cynthia Kutka
Signature/Date	
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Comments	

Name/Title	Gedas Kutka
Signature/Date	
	<input type="checkbox"/> Prepared By <input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Ken Fusco
Signature/Date	
	Reviewed with QA Team <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not Applicable
	<input type="checkbox"/> Prepared By <input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Lee Childs
Signature/Date	
	<input type="checkbox"/> Prepared By <input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Ron Coffee
Signature/Date	
	<input type="checkbox"/> Prepared By <input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Name/Title	Steve Heller
Signature/Date	
	<input type="checkbox"/> Prepared By <input type="checkbox"/> Accepted in Current State <input type="checkbox"/> Accepted with Noted Revisions <input type="checkbox"/> Rejected <input type="checkbox"/> Other (please indicate)
Comments	

Change History

Version No.	Date	Name	Description of Changes
01	03/04/2003	Tom Foley	Original Version

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1. External References

Pending acceptance of the Project Summary Specification (PSS) the following documents will be generated as dictated by the Unified Document Strategy (UDS) followed by RealLegal, LLC.

Title	Files can be found in...	Author	Date
Sign-off and Checklist for Practice Manager v8.7 SP3	See page C.	Tom Foley	03/04/2003
Functional Requirement Specification for Practice Manager v8.7 SP3	Not applicable.	N/A	N/A
Functional Design Specification for Practice Manager v8.7 SP3	Not applicable.	N/A	N/A
Technical Design Specification for Practice Manager v8.7 SP3	Not applicable.	N/A	N/A
Technical Design Specification for the Practice Manager v8.7 SP3 Data Model.	Not applicable.	N/A	N/A
Test Plans for the Practice Manager v8.7 SP3	http://pm.reallegal.com/reallegal/download/pm/pm_v87sp2/kx/testplans/	QA	
Development Schedule for the Practice Manager v8.7 SP3	Included in the development schedule (see http://pm.reallegal.com/reallegal/download/rd/schedules/current_development_scheduled.html)	Tom Foley	Updated Weekly
Turnover documents	http://pm.reallegal.com/reallegal/download/pm/pm_v87sp2/kx/turnover/	Saulius	
Lead Problem Report for the Practice Manager v8.7 SP3	http://iowa.pmt.lt/bugs/scripts/BugListing.asp?UPD=0&RESPONSIBLEID=-1&LOGIN=&APPLICATIONID=72&W HERE=report.APPLICATIONID%20%3D%2072%20&ORDER=Status%2C%20Areas%2C%20Type%2C%20ReportID http://thunder/bugs/scripts/BugListing.asp?UPD=0&RESPONSIBLEID=-1&LOGIN=&APPLICATIONID=72&W HERE=report.APPLICATIONID%20%3D%2072%20&ORDER=Status%2C%20Areas%2C%20Type%2C%20ReportID	QA	Updated Constantly
Meeting Minutes for the Practice Manager v8.7 SP3	http://pm.reallegal.com/reallegal/download/pm/pm_v87sp2/kx/other/	Tom Foley	

Title	Files can be found in...	Author	Date
User Manual for the Practice Manager v8.7 SP3	http://pm.reallegal.com/reallegal/download/pm/pm_v87sp2/kx/doc&help/	TechComm	
Install Guide for the Practice Manager v8.7 SP3	http://pm.reallegal.com/reallegal/download/pm/pm_v87sp2/kx/doc&help/	Tom Foley	
Practice Manager v8.7 SP3 Beta Screenshots for Marketing	Not applicable.	N/A	N/A
Project Post-Mortem for the Practice Manager v8.7 SP3	http://pm.reallegal.com/reallegal/download/pm/pm_v87sp2/kx/other/		
Release Page	http://pm.reallegal.com/reallegal/home/pm/pm_v87sp3.htm	Tom Foley	Last Update: 03/04/2003

2. Definition of Terms

The definition of terms from this document are outlined below.

Term	Definition
FRS / Functional Requirement Specification	Generated by Product Management; outlines requirements for the product covering one or more releases in order to steer the product in a given direction.
PSS / Project Summary Specification	Generated by Program Management to provide a summary of the plan, resources, and costs that will be included in each phase of the project.
FDS / Functional Design Specification	A living document generated by Program Management. It details the functionality, interfaces, and use cases of the program for each release of the program.
TDS / Technical Design Specification	A living document generated by a Technical Analyst that is carried from one release to the next. Details the technical decisions that are made including the technical architecture of the program and its associated data model.
Product	A product describes the deliverables of project including the executables, installations, documentation, marketing material, support plans, and other material.
Program	A program describes the deliverables of one or more projects within the development group including code, executables, installations, user manuals, install guides, and test plans.
Project	A project consists of a well-defined collection of small jobs (tasks) and culminates in a finished product. A project is temporary in nature meaning it has a specific start and finish.

3. PSS Introduction

The Project Summary Specification (PSS) is a document based on the Functional Requirement Specification (FRS) and contains the following:

- A summary of the project goals and objectives, major work activities, and major milestones.
- An estimate of the resources and costs involved in seeing the project to its final completion.
- If applicable, a summary of the project's relation to the strategic goals of RealLegal.
- If applicable, the long-term strategic plan set in place for the program including its immediate short-term release phases and long-term release schedule.
- A risk management analysis to identify potential risk and mitigate the risk to ensure success of the project.

The accepted (PSS) leads to the development of the Functional Design Specification (FDS) and eventually to the Technical Design Specification (TDS).

4. Project Overview

Corazon SP1, SP2, SP2A and SP3 are Service Pack releases for RealLegal Practice Manager version 8.7, originally developed under the Project Codename of Salado.

The following is a summary of counts, by Application Area, of PCRs that will be addressed in this release.

Name	Rvw		Hold		Pending					N/A					Deferred					Done					Final					Totals						
	B	T	B	T	B	F	U	I	T	B	F	U	I	T	B	F	U	I	T	B	F	U	I	T	B	F	U	I	T	B	F	U	I	T		
Bar Numbers					1				1																					1				1		
Components					1				1						2		1		3											3			1	4		
Database																							1	1										1	1	
Desktop Views															1				1										1	1	1				1	2
Document Assembly					4				4						1				1	2		1	1	4					1	1	7			1	2	10
Document Assembly Merge					5				5											5				5						10					10	
Document Assembly Settings					1				1						3				3											4					4	
Document DE					5				5						2	1	1		4	1				1	2					8	1		1	1	11	
Document Listing					1				1						2				2										1	1	3				1	4
Document Settings					1				1																					1					1	
Documentation/Manuals/Help									1										1					2					2					4	4	
Entity DE	1	1			10				10						3				3											14					14	
Entity Listing					1		1		2						1				1											2			1		3	
Entity Settings					1				1						2		1		3											3			1		4	
Filter					3				3																					3					3	
General									1						1				1											1			1		2	
Groupware DE					5		1		6						1				1											6			1		7	
Groupware Listing					1				1																					1					1	
Groupware Listing Query																			1					1									1		1	
Guideline															1				1											1					1	
Help									1										1														1		1	
Imageview					4				4						9				9											13					13	
Install/ Upgrade					6		4		10	1				1										2					2	7			6		13	

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Name	Rvw		Hold		Pending					N/A					Deferred					Done					Final					Totals				
	B	T	B	T	B	F	U	I	T	B	F	U	I	T	B	F	U	I	T	B	F	U	I	T	B	F	U	I	T	B	F	U	I	T
Mail Merge														2				2											2				2	
Matter DE					3				3						1			1											3	1			4	
Matter Listing			1	1	3				3																			4				4		
Matter:Annotations								1	1																						1	1		
Matter:Issues														1		1		2											1		1	2		
Matter:Tree View								1	1																						1	1		
Matter:Workflow																			1			1								1		1		
Note DE					2				2																				2				2	
Note Listing								1	1																						1	1		
Note Settings					1				1																				1				1	
Phone Call DE														1				1											1				1	
Printing					1		1		2																				1		1		2	
Query														1				1											1				1	
Security Settings								2	2																							2	2	
Site Settings								2	2																							2	2	
Source Code					1	1			2																				1	1			2	
System Settings								1	1			1	1	3				3											3		2		5	
TiffView					3				3					7				7			1	1							10		1		11	
Timeslip DE					1				1																				1				1	
Timeslip Listing					1				1											1	1								1		1		2	
Utility					1				1											1	1								1		1		2	
Workflow DE			1	1	3	1			4																				4	1			5	
Workflow Listing					1		1		2													1	1						1		1	1	3	
Workflow Settings														2				2											2				2	
Total	1	1	2	2	71	2	19		92	1	1	2	46	2	6	54	8	1	8	4	21					3	3	129	5	34	7	175		

5. Project History (Builds)

See http://pm.reallegal.com/reallegal/download/pm/pm_v87sp2/kx/turnover/.

6. Scope – Inclusions

This report is taken from the PCR Database. It is all PCRs in SP3 that, as of March 04, had a status of Pending, Done or Final . This list is subject to update, and the PCR Database always represents the latest and greatest version of this report.

The report is first sorted by Status, then Area, then Type and finally by ID.

There are additional fields available when this report is accessed from the PCR Database. Note that the links currently point to Thunder. This is only available if you connect to the PCR Database from the Lithuanian office or from the VPN. At the time this report was generated, there as no quick way to correct this. Future updates should have this corrected.

Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Pending	Bar Numbers	Bug	14259	Date of Admission field on the Bar Number screen should have the same mask, as DOB (Or DOD) field on the Other Details of Entity DE Comments: It seems like this filed doesn't have the same mask, as DOB (Or DOD) field on the Other Details of Entity DE. If I click within DOB field, it has __/__/__ mask (regardless of Date/Time format settings in the System Settings). But if I click within Date of Admission field, it doesn't have any mask, and unless I enter date with correct format, I will get ".is not a valid date" message.	8.7.40.1		Mike G		2/17/03 10:08:29 AM
Pending	Components	Bug	14501	Receiving message "Warning, YOUR connection to the database dropped" when attempting to set a Default Filter in Matter Settings	8.7.40.1	AmFam	Mike G	Feedback	2/26/03 2:32:17 PM
Pending	Document Assembly	Bug	12343	Merge with Word2000. When multiple documents are opened and generate one more document (use doc assembly	8.7.31.1		Rasa		11/14/02

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				<p>template), then this just generated document does not come to the front. I have to click on it on the title bar.</p> <p>Comments: For example: There is already a document (ex. 111.doc) opened. Merge one more document (112.doc) and use doc assembly template . After merge 112.doc does not come to the front. This happens just when creating document with dos assm template. When opening documens or create blank document works correct. The same with WordXP, when is checked 'Windows in Taskbar'.</p> <p>[TAF 01/15/2003] At the very least, we need a full understanding as to why this can or cannot work, and what it would take to make it work?</p> <p>[TAF 01/23/2003] There is not enough time in SP2 to get this coded and properly tested. It is potentially a high-risk fix, and a behavior that can be observed in Word when used outside of PM. Please note that part of the reason we did not have time to address this PCR in SP2 is because other PCRs, namely those involving AMFAM and Saga, were received late in the development cycle and superceded this one with respect to resource allocation</p>					
Pending	Document Assembly	Bug	13946	<p>In PM, create document profile, create document. Edit it save, then exit. Here WP exits but it also shuts PM down instantly.</p> <p>Comments: In PM, create document profile, create document. Edit it save, then exit. If you are creating a document using assembly, then after 2 or 3 documents the above will occur. If you skip document</p>	8.6.35.4	Dalan & Katz - 031.Ticket 25405	Ken F; Mike G	25405	1/30/03 4:31:07 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				assembly, you can create as many documents as you like. No error messages occur. Word Processor Version: WP 8.0.0.710 Client says he having this problem since September					
Pending	Document Assembly	Bug	14448	Receiving "The server threw an exception" message, when creating a document. Also, the same message received when "Entering info in PM8"	8.7.40.1	AmFam	Mike G, Ken F	Feedback	2/25/03 3:42:52 PM
Pending	Document Assembly	Bug	14495	Receiving message"The server threw an exception" when creating and changing documents Comments: Same problem reported by AmFam (PCR 14448 in SP3) 2. Trying to open a new document - Homestead Declaration; Editing documents from other PM files	8.7.40.1	Bacon & Wilson	Mike G	Feedback	2/26/03 1:45:19 PM
Pending	Document Assembly Merge	Bug	13561	When merge document get an error 'Could not find WLL window to communicate with Ms Word' Comments: There are installed Word 2000 on PC. Create new document, select Application=Word97, merge a document, MS Word window is opend and have got an "Word CAPI" error 'Error-1'. Click OK and close Word screen. In Profile de change the application to Word2000 and merge document. When the document is merged (all PM field are retrieved), have got an 'PM to Word 97 Merge' error. [TAF 01/19/2003] We need to check and make sure the template uses an application that is installed. If the application is installed, then proceed with the merge. If not, display an error	8.7		Rasa		1/18/03 1:29:37 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				message: "The document merge could not be completed because the selected application is not installed on this workstation. [OK]" PCR 11015 addresses the checking of all components involved in the merge to make sure they are of the same application family, throwing an error if they are not. This prevents the user from carrying out a merge with both Word and WordPerfect components selected. Right now, I believe we only make sure the template and boilerplate are of the same engine when selected. The Letterhead, Caption and COS could actually be of different engines					
Pending	Document Assembly Merge	Bug	13643	When merge a document and have got message that letterhead (boilerplate...) does not exist, hit on any place in PM (e.g. on Save, Cancel buttons), the message hidden behind the PM screen. Maybe should be better, that this message should be always on top?	8.7		Rasa		1/19/03 5:55:10 PM
Pending	Document Assembly Merge	Bug	13808	When the first time click on Generate a document have got 'The conversion of a char data type to a datetime data type resulted in an out-of-range datetime value'. Click the second time, document is merged. Comments: For example: Create new document. Select doc assm components (in FRM file of this components exist field, which is not assigned in Document Component Design DE form). Click on Generate document. Have got an error. OK. Click the second time Generate	8.7.39.1		Rasa		1/24/03 7:35:28 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Document. Document is merged. I try the same situation on another DB (db=pm87_sql7_qa1), works correct. This happens if users Default Language in SQL Server is British English.					
Pending	Document Assembly Merge	Bug	14310	When generate some documents with doc assm templates, get access violation. Comments: Word Processor Version: WP 8.0. Generate document with doc assm template (this template has some PM fields and keyboard fields). Document is generated. Then generate one more document with the same template. After 2 or 3 documents, get access violation (attached screenshot). Also I get the same error, when after document merge, go to Document Assembly Settings, create new component, enter Description, assign some fields, select Engine and then hit on FileName cowboy hat button.	8.7.40.1		Rasa		2/19/03 2:28:43 PM
Pending	Document Assembly Merge	Bug	14312	Word Processor: WP 9.0. Merge document with Doc Assm Template (it has some keyboard fields). When Corel application opens the merge process is not executing (Merge Message screen displayed, you cannot enter anything, cannot Close Corel application) Comments: Tested on Citix	8.7.40.1		Rasa		2/19/03 2:45:26 PM
Pending	Document Assembly Settings	Bug	13718	Filter 'Assignments to show... All' in Assignment tab has to show Global and Author-Specific component assignments, not all assignments of Law category, Law Type, etc	8.7.38.1		Abe		1/22/03 6:11:35 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Pending	Document DE	Bug	13386	When using Pmpaper.exe a 40 or 50mb file will cause the app to stop running Comments: When scanning file over 150 pages pmpaper dies Pmpaper.exe Paperport version 7.0	8.6.35	Stephanie J. Stevenson, P.C.	Josh Berlin	24333	1/15/03 11:28:17 AM
Pending	Document DE	Bug	13455	Error when creating document Comments: [Bacon&Wilson] Every time this person tries to create a new document, she gets this error. No document is created. I have tried re-installing the client, and re-installing MDAC - neither option worked. The macro settings are set to low, and VB objects are trusted sources Message: This file could not be found. Try one of the following: *Check the spelling of the name of document *Try a different file name [NFI] Behaves the same whether in citrix or not.	8.7.33.2	Bacon&Wilson	Steve Adams	23422	1/16/03 1:10:13 PM
Pending	Document DE	Bug	14442	Error message "External exception C0000006" when clicked on Caption button in Document DE	8.7.40.1	AmFam	Mike G; Ken F	Feedback	2/25/03 3:06:55 PM
Pending	Document DE	Bug	14485	Error message "The column prefix 'ENTTYPE' does not match with a table name or alias name used in the query" when going to Entities tab in Document DE	8.7.40.1	AmFam	Krebs-Otto, Rita J	Feedback	2/26/03 5:11:25 PM
Pending	Document DE	Bug	14538	Receiving Message "One or more items in the folder you synchronized do not match. To resolve the conflicts, open the items, and then try this operation again" when	8.7.40.1	AmFam	Mike G	Feedback	2/27/03 3:24:05 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				entering a hearing					
Pending	Document Listing	Bug	14386	If you remove Primary Matter No column from the listing and save Grid layout, after closing and reopening PM column still displayed. Comments: Both Doc Global and Matter:Doc listings	8.7.40.3	Summer S	Mike G		2/21/03 12:25:22 PM
Pending	Document Settings	Bug	13688	Tab order is incorrect in Document Template DE Comments: Tab order is: 1. Edit 'Template Code' 2. Checkbox 'Public Template' 3. Edit 'Description' Should be 1. Edit 'Template Code' 2. Edit 'Description' 3. Checkbox 'Public Template'	8.7		DK		1/21/03 4:28:33 PM
Pending	Documentation/M anuals/Help	Update	14482	Update TO with info regarding <PMROOT>\KOFAX_INS directory - see 14410	8.7.40.4		Donatas		2/26/03 3:44:42 PM
Pending	Entity DE	Bug	14300	Access Violation when checking on an entity for a phone number. Comments: Access violation at address 007ED65E in module 'PMWIN.exe'. Write of address 000000E0	8.7.40.1	Bacon&Wilson	Alice D. Delorme	Feedback	2/19/03 10:40:58 AM
Pending	Entity DE	Bug	14328	Error "Invalid column name 'MEDCAREPRID'" when cancelling the "adding" of an entity (adding a party)	8.7.40.1		McRae Huszagh	Feedback	2/20/03 12:19:01 PM
Pending	Entity DE	Bug	14450	Receiving "Warning, YOUR connection to the database dropped" Message ,when GOING FROM GENERAL TAB TO OTHER DETAILS IN AN ENTITY.	8.7.40.1	AmFam	Mike G, Ken F	Feedback	2/25/03 3:49:43 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Pending	Entity DE	Bug	14503	Receiving message "A component named frmEntityInfo already exists" when trying to look at an address of an already assigned entity	8.7.40.1	AmFam	Mike G	Feedback	2/26/03 3:51:48 PM
Pending	Entity DE	Bug	14523	Access violation when going from the assign screen to the detail screen - where we put in the date of birth and SS# Comments: Access violation at address 007F8AE3 in module 'PMWIN.exe'. Read of address 00000008 This error also received when "when Trying to get to the "other details" screen on an entity"	8.7.40.1	AmFam	Swenson, Angela J	Feedback	2/27/03 2:18:25 PM
Pending	Entity DE	Bug	14530	Access Violation when attempting to open an entity to make modifications Comments: Access violation at address 007ED65E in module 'PMWIN.exe'. Write of address 000000E0	8.7.40.1	AmFam	Conover, Sarah J	Feedback	2/27/03 4:49:17 PM
Pending	Entity DE	Bug	14536	Received "Access violation at address 007F8AE3 in module 'pmwin.exe'. Read of address 00000008" error when switching from general to other details tab in entities	8.7.40.1	Wilkes & McHugh	Mike G	Feedback	2/27/03 2:55:31 PM
Pending	Entity DE	Bug	14540	Receiving "Access violation at address 007ED65E in module 'PMWIN.exe'. Write of address 000000E0" when Opening Address on Entity	8.7.40.1	AmFam	Mike G	Feedback	2/27/03 3:34:13 PM
Pending	Entity DE	Bug	14550	Receiving Message "A component named frmEntityInfo already exists" when in entities	8.7.40.1	Wilkes & McHugh	Mike G	Feedback	2/27/03 4:49:27 PM
Pending	Entity DE	Bug	14604	Receive "Access violation at address 007ED65E in module 'PMWIN.exe" error when Attempting to add Matter Related	8.7.40.1	AmFam	Mike G	Feedback	3/3/03 3:36:13 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Party's date of birth					
Pending	Entity Listing	Bug	14602	Receive Message "Warning, YOUR connection to the database dropped" when going to Edit Preferences from Related Tree of Entity	8.7.40.1	AmFam	Mike G	Feedback	3/3/03 3:26:38 PM
Pending	Entity Listing	Update	14384	Ability to "Save Grid Layout" in "Related Matters" dialog box (this one is really important, particularly if used as part of conflicts checking) Comments: [Cynthia Kutka 2/21/03] I think it should be considered for SP3 depending on how difficult and time-consuming it is to implement. It is not important enough to delay the release of SP3.	8.7.40.1	Shriners	Mike G		2/21/03 9:28:28 AM
Pending	Entity Settings	Bug	14446	Receive "Warning, YOUR connection to the database dropped" message, when working in the Entities settings.	8.7.40.1	AmFam	Mike G; Ken F	Feedback	2/25/03 3:30:55 PM
Pending	Filter	Bug	13754	Remove mask from Entity Filter All Phone#s field. Add support of wildcards Comments: International format is disabled. Right now you have to enter all 10 digits, otherwise you cannot apply this filter.	8.7.38.1		Mike G		1/22/03 4:13:58 PM
Pending	Filter	Bug	13916	Groupware global listing filter: Sent Date To, Start Date To, Due Date To, Event Date To-Date From fields do not work properly Comments: 1. Sent Date To: I set it to 01/20/03 but returned results exclude this date. Returned results should include 01/20/03. The same problem also found on Note global listing filter. 2.Start Date To has the same problem 3. Due Date To has the same problem	8.7.39.1		Mike G		1/29/03 1:58:01 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				4. Event Date To-Date From are not respected at all					
Pending	Filter	Bug	14597	On Reschedule Event screen, "By" faucet filter doesn't have right-click option Filter Field. Comments: On Workflow item DE click Reschedule->on Reschedule Event screen right-click on "By" faucet filter.	8.7.40.4		Mike G		3/3/03 12:29:08 PM
Pending	General	Update	14204	Remove the Files\ subfolder from the turnover file set. The only folders that should be included are the Install, Upgrade and KX folders Comments: [PMT\tom 3/4/03] Note that we will still create the Files\ folder in Lithuania, we just won't upload it or reference it in the turnover document.	8.7		TF		2/13/03 9:22:28 AM
Pending	Groupware DE	Bug	14454	Receiving "Warning, YOUR connection to the database dropped" message, when in creating a new task in Groupware. Also, receiving the same message when "Creating a groupware message"	8.7.40.1	AmFam	Mike G, Ken F	Feedback	2/25/03 4:29:15 PM
Pending	Groupware DE	Bug	14544	Receiving Message "One or more items in the folder you synchronized do not match. To resolve the conflicts, open the items, and then try this operation again" when SENDING APPT IN PM GROUPWARE TO OUTLOOK SENDS APPT TO OUTLOOK NOT SAVED IN GROUPWARE Comments: Also, when Sending Appt to myself. Also updating a date in Groupware. Also, when entering a date (meeting) and time. Also, Sending Appt through Groupware to Outlook Appt is in Outlook and not in Groupware. Also,	8.7.40.1	AmFam	Mike G	Feedback	2/27/03 4:06:08 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Sending Appointment Outlook- Appointment appears in Outlook but not saved in Groupware.					
Pending	Groupware DE	Bug	14546	Receiving Message "Description>Cannot resolve recipient – To" when sending an appointment through Groupware	8.7.40.1	Fuller, Johnson & Farrell	Mike G	Feedback	2/27/03 4:21:09 PM
Pending	Groupware DE	Bug	14606	Receive "Warning, YOUR connection to the database dropped" when Trying to send a note by e-mail	8.7.40.1	AmFam	Mike G	Feedback	3/3/03 3:47:55 PM
Pending	Groupware DE	Bug	14645	Error message "Exception occurred: External exception C0000006" when drag incoming mail into a matter	8.7.40.1	AmFam	Long, Gwendolyn K	Feedback	3/4/03 5:40:47 PM
Pending	Groupware DE	Update	13964	Sending Groupware from Note DE does not supports System Setting "Use ClientNumber.MatterNumber" in Subject	8.7.40.1		Donatas		1/31/03 3:00:12 PM
Pending	Groupware Listing	Bug	14573	Receive Message "Warning, YOUR connection to the database dropped" when Checking email coming in - recorded statement from WDM word processing	8.7.40.1	AmFam	Mike G	Feedback	2/28/03 10:18:04 AM
Pending	Help	Update	14617	Remove the links to the User's Guide and Administrator's Guide from the Help menu and Start menu. Also remove pm.ag.pdf and pm.ug.pdf from the file set	8.7.40.4		TF		3/4/03 10:05:01 AM
Pending	Imageview	Bug	13545	Out of memory error using TextBridge OCR: Comments: Lisa has encountered this error during her testing of the OCR. I have yet to replicate the error. Symptoms: When the TextBridge application is launched from the OCR window of ImageView, this error occurs. Action: We have no plan for resolving this	8.4.35.2	Amfam	Ken		1/17/03 5:12:59 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				problem at this time; this letter is the first opportunity we have had to inform RealLegal of the issue. We have only very recently uncovered this problem. Status: The ImageView program can be divorced from the 8.7 rollout and we can continue to use the Kodak Image Viewer until the issue is resolved, so the risk is low. Our desire for the OCR feature is extreme, so the impact of this issue is also of the highest nature.					
Pending	Imageview	Bug	13829	In Window menu displayed not all of document's pages and order of pages is incorrect. Comments: Open multipage image with Image Viewer (for example there are 11 pages). Go to Window menu, you see just 4 pages. Clicking arrow button go to next pages. Again go to Window menu, now you see more pages. Also the pages are not ordered (the first displayed 'page #4', 'page #3', 'page #2', 'page #1', 'page #5',)	8.7.0.24		Rasa		1/27/03 1:36:35 PM
Pending	Imageview	Bug	14102	I just noticed that there is still logo and company name of law.com on the left side of %subj%. PM version is 8.7 SP2A. Comments: [PMT\Tom 3/4/03] New bitmaps are available in \\L\devsql1\ID\QA\builds\pm\pm_v87sp3\kx\specs\pm.bitmaps\. Let me know if you need anything else for this.	8.7.0.24		Audrius		2/10/03 5:13:30 PM
Pending	Imageview	Bug	14516	When close ImageViewer window, have got an error. Comments: Open document with ImageViewer (this document has 11 pages). In Page menu> Visible Pages is	8.7.0.24		Rasa		2/27/03 1:08:47 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				set 20 pages. With Next Page button go to the last page. Then from Page> Visible Pages set 5 pages, OK. Close Image Viewer. Have got ant error 'List index out of bounds (0)'					
Pending	Install/ Upgrade	Bug	13975	When I select to install HotDocs, in Doc settings>Application Hot docs should assemble with the default WP I selected during install. Comments: During Install I set Word XP as the default WP with no additional WP. When I went to Doc Settings>Application Hotdocts Automator was set to assemble with Word 97. Also HOTDOCTS should be spelled HOTDOCS [PMT\tom 3/4/03] The HotDocs Automator should be configured for whatever Word Processor is selected as the default during install.	8.7		Ken		1/31/03 5:03:36 PM
Pending	Install/ Upgrade	Bug	14081	This happens right after install (being run on the file server MPPMFS01) asks for login to the SQL Server. I have selected MPSQL02, SA, blank password Comments: Same happens when trying to use NT Authentication. Same happened when I tried to use MUMBO-JUMBO for login. :-) This problem was worked around by running on the SQL Server box (MPSQL02) [TF 02/28/2003] If the install or upgrade cannot proceed with the SQL portion, it needs to just place all SQL files in a folder and proceed with the file set portion of the install/upgrade. A message needs to display advising the user that this is the case	8.7.40.1		Gedas		2/10/03 3:26:26 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Pending	Install/ Upgrade	Bug	14085	Running client install on the Citrix server MPCTX-01 crashed the OS	8.7.40.1		Gedas		2/10/03 3:26:26 PM
Pending	Install/ Upgrade	Bug	14185	Install PM 8.6.35, upgrade it to 8.7.40 and run uninstall > initial Uninstall window talks about PM 8.6 (for both - client and network server).	8.7.40.1		Arunas		2/12/03 4:37:40 PM
Pending	Install/ Upgrade	Bug	14209	In PM 8.0.75.1 select International Format checkbox in System Settings. Upgrade PM to 8.7.40.1 - International Format checkbox is no longer selected.	8.7		Arunas		2/13/03 11:13:12 AM
Pending	Install/ Upgrade	Bug	14361	When installing, make path be F:\pmwin\pm87 ('\' is missing after F:), where F: is my system disk > installation accepts this path and puts all the files to F:\WinNT\System32\pmwin\pm87.	8.7.40.1		Arunas		2/21/03 2:14:54 PM
Pending	Install/ Upgrade	Update	14583	Update the installs and upgrade programs with files from PCR 14582	8.7		TF		3/3/03 10:03:11 AM
Pending	Install/ Upgrade	Update	14584	Update the install programs for GA release with the SP3 program file set (see 14582)	8.7		TF		3/3/03 10:04:19 AM
Pending	Install/ Upgrade	Update	14585	Update the upgrade programs for GA release with the SP3 program file set	8.7		TF		3/3/03 10:05:06 AM
Pending	Install/ Upgrade	Update	14619	Remove pm.ag.pdf and pm.ug.pdf from the file set. If found on upgrade, remove them from the Help menu	8.7.40.4		TF		3/4/03 10:07:18 AM
Pending	Matter DE	Bug	14497	Receiving message "Exception occurred" every time I create a new document, in all matters	8.7.40.1	Bacon & Wilson	Mike G	Feedback	2/26/03 2:02:27 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Pending	Matter DE	Bug	14548	Receiving Message "Warning, YOUR connection to the database dropped" when Trying to assign entity in matter	8.7.40.1	AmFam	Mike G	Feedback	2/27/03 4:32:43 PM
Pending	Matter DE	Bug	14571	Receive Message "A component named frmEntityInfo already exists"when Entering Entity information in the Matter. Also, when Updating Entity address information. <i>Comments: Wilkes also receives the same message: PCR 14550</i>	8.7.40.1	AmFam	Mike G	Feedbak	2/28/03 9:38:10 AM
Pending	Matter Listing	Bug	14499	Trying to retrieve a filter which worked fine when it was created and applied, but every time we try to use the filter after that it gives the error below. We've tried clearing all filters before applying it and it still doesn't work. <i>Comments: Invalid floating point operation</i>	8.7.40.1	Glasser and Glasser	Mike G	Feedback	2/26/03 2:13:53 PM
Pending	Matter Listing	Bug	14542	Receiving Message "Warning, YOUR connection to the database dropped" when Going into preferences from Matter listings	8.7.40.1	AmFam	Mike G	Feedback	2/27/03 3:46:03 PM
Pending	Matter Listing	Bug	14575	Receive Message "Warning, YOUR connection to the database dropped" when Looking up claims numbers under "matter name"	8.7.40.1	AmFam	Mike G	Feedback	2/28/03 10:36:28 AM
Pending	Matter:Annotations	Update	14560	Add auto-refresh to the Matter-Annotation listing to respect the System Setting	8.7		TF		2/28/03 10:01:47 AM
Pending	Matter:Tree View	Update	13776	Cannot view type from within timeslips when selected as a viewable column. <i>Comments: Within a matter, go to treeview choose timeslips. From there choose options and select 'type' as a viewable column then hit ok. Type shows</i>	8.7.35.1	NFI Industries 0262	Ken	25144	1/23/03 3:02:13 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				up blank					
Pending	Note DE	Bug	13806	In Note DE have got an error 'Cannot focus a disabled or invisible window Select Text'. Comments: This user has checked 'Spellcheck Notes on Save' in User Preferences> General tab. Create new note enter required fields, enter any incorrect text for note (ex. 'hhome'), go to Related to Issues tab. Spelling screen appears, hit Ignore, then OK. In Related to Issues tab click on Close button. Have got confirm message 'Do you want to save the note?', click Yes. Have got an error.	8.7.39.1		Rasa		1/24/03 7:27:30 PM
Pending	Note DE	Bug	14579	Receiving Message "Warning, YOUR connection to the database dropped" when Attempting to enter new Note	8.7.40.1	AmFam	Mike G	Feedback	2/28/03 2:24:48 PM
Pending	Note Listing	Update	14002	Add Other Party, Other Party's Phone Number and Message text as available columns in the Notes Global listing Comments: per Feature Request from Wilkes & McHugh ("need to have ability to print phone notes") [PMT\tom 3/4/03] Also make sure they are available in the query.	8.7.40.1	Wilkes & McHugh	Cynthia K; Mike G		2/4/03 9:01:04 AM
Pending	Note Settings	Bug	14444	Receive "Warning, YOUR connection to the database dropped" message, when clicking on the administration menu – Notes	8.7.40.1	AmFam	Mike G, Ken F	Feedback	2/25/03 3:19:39 PM
Pending	Printing	Bug	14318	Clicking Cancel on the Print dialog box doesn't cancel printing. Comments: From any listings click Printer->on the Report Settings screen click Print Report-> on the Print dialog box click	8.7.40.1		Mike G		2/19/03 11:33:05 AM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Cancel-> report still printed.					
Pending	Printing	Update	14469	<p>Update the Save As functionality for list printing to by-pass QuickReports limitation on only saving what is in the preview -- all selected columns should be saved to the file</p> <p>Comments: [PMT\Tom 3/4/03] I see two ways of handling this:</p> <ol style="list-style-type: none"> 1. In Quick Reports, when you choose to save to file, include all fields from the Selected Fields panel on the Report Settings-Customize tab, regardless of what is actually displayed in the review. 2. To the Report Settings - Main tab, add the ability to save to file using any of the file types in Quick Reports. Two mockup-ups of this is attached - one for printing to the print and one for printing to a file. Click Print actually prints the report to file as the selected type. <p>Either solution will be satisfactory.</p>	8.7		TF		2/26/03 1:39:26 PM
Pending	Security Settings	Update	14202	<p>For firms upgrading from PM86 SP2 or earlier, automatically assign securities created in PM87 using the agreed upon auto-assign rules</p> <p>Comments: The following new securities should be automatically assigned to every existing role as they were applied to existing PM functionality that did not have security in earlier versions:</p> <ul style="list-style-type: none"> -- Add New Entity Relationship -- All Filter/Query Access -- Allow clear Billable field on Entity Record -- Allow clear Client field on Entity Record -- Edit Entity Relationship -- Remove Entity Relationships 	8.7		TF		2/13/03 9:14:26 AM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				<p>The following new securities should be automatically assigned to every existing role that has "Edit Standard Matter: General" as they were applied to existing PM functionality that originally inherited security from "Edit Standard Matter: General" in earlier versions:</p> <ul style="list-style-type: none"> -- Edit Standard Matter: Billing -- Edit Standard Matter: Summary/Desc <p>The following new securities should NOT be automatically assigned to any existing role because they represent new functionality in Practice Manager and should only be assigned based on the firm's internal policies:</p> <ul style="list-style-type: none"> -- Allow General Bar Numbers -- Open Desktop View - Manager -- Open Desktop View - Single User -- Open Desktop View - Two-Party -- Outlook Access -- Report Errors and Send Feedback <p>Note, for upgrade from PM87, we cannot auto-assign these functions because the firm has already been upgraded, assignments have been made, and any auto-assigning would over-write the firm's existing assignments</p>					
Pending	Security Settings	Update	14609	The assignment of functional security options to a security role must include Date Created and Date Revised to support Web forms	8.7		TF		3/4/03 9:11:13 AM
Pending	Site Settings	Update	13762	Modify the Drive Mapping DE form Comments: (1) modify the Drive Mapping DE form to strip out the last "I" and	8.7		TF		1/23/03 1:36:05 PM

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				(2) have the mapping logic also strip it out or ignore the last "\", if found					
Pending	Site Settings	Update	14352	<p>GMT/UTC Preparation Requirements for SP1 - GMT/UTC Site Settings. Comments: On the Site D/E Form, add the following required fields:</p> <ol style="list-style-type: none"> 1. Timezone of the site - this list should be the same as that in Microsoft Window (I believe this can be read from the O/S). 2. Automatically Adjust for Daylight Savings Time - Checkbox, which indicates whether or not the time at the site respects daylight savings time. <p>[PMT\Tom 2/21/03] The default value for this field should be the Time Zone of the SQL Server. The user can change as needed.</p> <p>Upon upgrade, make sure the Time Zone field is populated with the Time Zone of the SQL Server.</p> <p>[PMT\Tom 2/21/03] On upgrade, the Automatically Adjust for Daylight Savings Time checkbox should be checked or not checked based on the settings for the SQL Server.</p>	8.7		TF		7/15/02 3:33:13 PM
Pending	Source Code	Bug	14586	<p>Respect the Regional Options in timeslips and timeslip reports (same as PM80) Comments: I think this was something that was added in PM80 but never got added in PM81. I am classifying it as a bug because it is functionality that existed in a prior version that should have been carried forward, and was not... that makes it a bug</p> <p>[PMT\Tom 3/3/03] Okay, we are going to handle this a bit differently in PM87 and</p>	8.7.40.4		TF		3/3/03 11:00:45 AM

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				higher. The plan is to allow the user to be able to select the format for the currency, similar to what you can do in Regional Settings. I think, for this release, we will simply add a Currency field under Date/Time Format that allows you to enter a symbol that will be used in all places in PM where a currency symbol appears.					
Pending	Source Code	Feature	14024	Add Publish Points to support Lotus Notes Integration Comments: [PMT\tom 3/4/03] A mini-spec will be available by 03/07/2003.	8.7		TF		2/6/03 2:37:56 PM
Pending	System Settings	Update	14351	GMT/UTC Preparation Requirements for SP1 - GMT/UTC System Settings. Comments: These values are for information only, and do not actually write values to the database. 1. Add new field (read-only) to System Settings to display the timezone of the database server (this should be read from the system). 2. Add a new field (read-only checkbox) to indicate whether the server time is automatically adjusted for daylight savings time.	8.7		TF		7/15/02 3:28:48 PM
Pending	TiffView	Bug	14108	I just noticed that there is still logo and company name of law.com on the left side of %subj%. PM version is 8.7 SP2A. Comments: In both versions of Tiffviewer [PMT\tom 3/4/03] New bitmaps are available in \\Ltdevsql1\D\QA\builds\pm\pm_v87sp3\kx\specs\pm.bitmaps\ . Let me know if you need anything else for this.	8.7.3.23		Audrius		2/10/03 5:13:30 PM
Pending	TiffView	Bug	14508	When close TiffViewer window, have got	8.7.32.5		Rasa		2/27/03

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				an error. Comments: Open document with TiffViewer (this document has 11 pages). In Page menu> Visible Pages is set 20 pages. With Next Page button go to the last page. Then from Page> Visible Pages set 5 pages, OK. Close Tiff Viewer. Have got ant error 'List index out of bounds (0)'					12:45:59 PM
Pending	TiffView	Bug	14639	In Window menu displayed not all of document's pages and order of pages is incorrect. Comments: Open multipage image with Tiff Viewer (for example there are 11 pages). Go to Window menu, you see just 4 pages. Clicking arrow button go to next pages. Again go to Window menu, now you see more pages. Also the pages are not ordered (the firs displayed 'page #4', 'page #3', 'page #2', 'page #1', 'page #5',)	8.7.0.24		Rasa		1/27/03 1:36:35 PM
Pending	Timeslip DE	Bug	14452	Receive "Warning, YOUR connection to the database dropped" message, when creating timeslip	8.7.40.1	AmFam	Mike G; Ken F	Feedback	2/25/03 4:21:18 PM
Pending	Timeslip Listing	Bug	14013	Got an access violation error after archiving the timeslips. Comments: Timeslip Settings -> General -> Billing Program: Juris -> check Enable Advanced Timeslip Archiving -> Save. Open Timeslip Listing, go again to Timeslip Settings and choose PMBill, press Save. Right-click in Timeslip Listing -> Archive -> List -> Get an error 'Invalid column name 'ACTIONDATE' ' -> OK. Right-click again, choose View Archive -> again the same error appears -> Buttons 'New' and 'Open' disapear -> press OK.	8.7.40.1		Sigita		2/4/03 3:39:40 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				<p>Right-click once more, choose View Archive -> again the same error appears -> Buttons 'New' and 'Open' appear -> press OK. Press 'Open' -> Timeslip Template DE is opened and you get an error 'Query TimeslipListing: Field 'TIMESLIPID' not found' -> OK. Press Close -> get an access violation error 'Access violation at address 0087B17E in module 'PMWIN.exe'. Read of address 00000008. (When PMBill is chosen, one has to rerun Timeslip Listing, as archiving is not allowed with PMBill. I simply forgot to rerun Timeslip Listing, the timeslips were archived, but the above behavior occurred. I had to restart PMWIN, go again to Juris in order to get all the timeslips back from archive.) [Vygintas] I would consider this a low priority bug, because of unlikely scenario - changing billing program on the run. Also this change to PMBill is 'illegal' as required script is not run, which triggers "Invalid column name 'ACTIONDATE". But anyway this problem is complex.</p> <ol style="list-style-type: none"> Access Violation could be prevented by <ol style="list-style-type: none"> improving Timeslip Listing - do not open Timeslip DE by pressing 'Open' when listing is empty. improving Timeslip DE - do not free objects on destroy that were not created both How to prevent archiving when PMBill is selected <ol style="list-style-type: none"> Read "Disable Archiving" setting right before archiving. Stop if not allowed make changes to any Timeslip General settings to be effective only after PM reload. 					

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				c) both 3. Prevent change to PMBill when script is not run. - not sure how I suggest 1. c) and 2. a) for Corazon					
Pending	Utility	Bug	14429	PMTemplate convert utility problem with Core8. Comments: e.g. in a component exist following format: IFNOTBLANK(Mat_CivilActNo)Case No. FIELD(Mat_CivilActNo)ENDIF. When run utility, changed just one field - IFNOTBLANK(Mat_CivilActNo)Case No. FIELD(Mat_CaseNo)ENDIF. Should be IFNOTBLANK(Mat_CaseNo)Case No. FIELD(Mat_CaseNo)ENDIF. Looks like, that changed just field which has format FIELD(Mat_CivilActNo).	1.1.2.7	Bowers Harrison	Rasa	23879	2/25/03 2:42:01 PM
Pending	Workflow DE	Bug	13798	PMWin Not responding when negative number is selected in Workflow Activities Schedule. Comments: Open Workflow DE and click on Occurrence button. In Schedule Activity window select Weekly frequency. There is possibility to choose negative number in activity occurrence every ... week field with buttons. Set activity occurrence every -4 (any negative number) week. Hit Save. PMWin Not responding. [PMT\tom 3/4/03] Do not allow negative numbers in frequency fields.	8.7.39.1		Ligita		1/24/03 4:10:26 PM
Pending	Workflow DE	Bug	13813	In Appointment DE press on cowboy hat near Location field. Select one of entities from Entity Listing which is not Staff. Answer yes to assign as participant to	8.7.39.1		Ligita		1/24/03 8:38:43 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				activity. Add Entity DE Entity name faucet filter and OK button are disabled.					
Pending	Workflow DE	Bug	14250	Access violation, when entering a task into PM Comments: Access violation at address 01BD980A. Write of address 00000050	8.7.40.1	Wilkes & McHugh	PSTANLEY	Feedback	2/17/03 3:31:48 PM
Pending	Workflow DE	Feature	14647	Add the ability to suppress the Status Change dialog box. This is both a System Setting and User Preference Comments: 1. Add a System Setting (Saulius -- You may wan to create a "Workflow" tab in System Settings and move all the workflow-related items to it... the General tab is getting really full -- In Chimborazo, all this moves to a General tab in Workflow Settings): Show Status Change dialog when items are <input type="checkbox"/> Marked "Cancelled" <input type="checkbox"/> Marked "Not Started" <input type="checkbox"/> Marked "In Progress" <input type="checkbox"/> Marked "Completed" 2. If the System Setting in #1 is NOT checked, then new Edit - Preferences appear on the Workflow tab: Show Status Change dialog when items are <input type="checkbox"/> Marked "Cancelled" <input type="checkbox"/> Marked "Not Started" <input type="checkbox"/> Marked "In Progress" <input type="checkbox"/> Marked "Completed" The options in #1 allow the firm to set a policy about whether this form is required or not when the status is ... some firms want it, which is why it was added.	8.7		TF		3/4/03 6:01:11 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				<p>The options in #2 allow the user to suppress the automatic display of this form when the status of an item is changed IF the firm allows the form to be suppressed for the status (based on selections in option in #1).</p> <p>For example, if the firm checks "Not Started" and "Cancelled" in #1, the user CANNOT suppress the form when choosing either of those statuses; however, if the user chooses to, they can suppress the form so it does not appear when changing the status to "In Progress" or "Completed".</p> <p>When we implement this, only "Cancelled" would be checked in #1 and nothing would be checked in #2 by default, as that basically replicates the same functionality as PM80 for marking an item Complete</p>					
Pending	Workflow Listing	Bug	14388	<p>If you remove Matter No column from the listing and save Grid layout, after closing and reopening PM column still displayed. Comments: Only Workflow Global listing</p>	8.7.40.3		Mike G		2/21/03 12:34:53 PM
Pending	Workflow Listing	Update	13742	<p>Multiselect>change status not always working Comments: From WF test plan In Workflow Listing select multiple rows, change Status usin View>Change Status when I select 4 items to change, usually only 3 have their status changed. It seems that the right click actually deselects a record</p>	8.7.38.1		Ken		1/22/03 11:26:52 AM
Done	Database	Info	14154	NT Authentication configuration steps.	8.7		Ken		8/6/02

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				<p>Comments: Here are steps to set up the environment in order to test NT authentication. Practice Manager currently does not create Windows users when creating Entities when "NT Authentication" option is selected in System Settings. Therefore for every user entity created in Practice Manager you will have to perform these steps.</p> <p>Scenario if "NT Authentication" setting is enabled in PMWIN.</p> <ol style="list-style-type: none"> 1. Create NT user using NT user creation tools as administrator of machine or domain. 2. Create Entity of type USER in Practice Manager. Login for this entity must be the same as the NT username, such as [MY_USER]. This is because Practice Manager in addition to existing system security (SQL type or NT Authentication) verifies if such user has rights to access Practice Manager database. 3. Start Enterprise Manager. 4. Go to <Server_Name> -> Security -> Logins. 5. Create new login and enter login for the machine or domain, such as: MY_DOMAIN\MY_USER, where [MY_DOMAIN] is NT domain name or your machine name, and [MY_USER] is NT domain or machine user. <ol style="list-style-type: none"> 5.1. Go to Database Access tab and select databases this login will be able to login to. This action will create appropriate user in those databases, such as [MY_USER]. 5.2. Select roles that are permitted for that 					

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				<p>user in every database you've selected.</p> <p>Roles list is:</p> <p>5.2.1. Public</p> <p>5.2.2. DB_SECURITYADMIN - Can manage all permissions, object ownerships, roles and role memberships.</p> <p>5.2.3. DB_DDLADMIN - Can issue ALL DDL, but cannot issue GRANT, REVOKE, or DENY statements.</p> <p>5.2.4. PM - this is Practice Manager role which specifies access to all Practice Manager data objects.</p> <p>6. Make sure your machine is part of the domain, if you need to access remote DB as a domain user using NT authentication.</p> <p>6.1. To verify that, right click on icon My Computer on your desktop.</p> <p>6.2. Go to Properties -> Network Identification tab -> Properties and select "Member of Domain" and pick required domain, such as MY_DOMAIN.</p> <p>6.3. This action will require domain administrator login and password to confirm that such machine can be part of specified domain.</p> <p>6.4. Reboot your machine and login as domain user into Windows OS.</p> <p>7. Check you UDL file, so that it has correct settings.</p> <p>7.1. Pick right server in UDL configuration.</p> <p>7.2. Select "User Windows NT integrated security"</p> <p>7.3. Select required database.</p> <p>8. Start Practice Manager with switch PMWIN.EXE /UDL=MY_UDL.UDL</p> <p>9. If you want to access local server (running on your machine), make sure that you are logging into your machine when logging into Windows NT.</p>					

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Done	Document Assembly	Bug	14277	<p>When you merge a document with more than one role and include the bar number field, only the bar number for the first entity with the first role is being pulled in</p> <p>Comments: Steps to recreate:</p> <ol style="list-style-type: none"> 1. Create a template with two different role field groups, each group containing Bar Number. For example: Entity Role / Attorney -- Co-Counsel: { Field("ER149AttorneyCocounsel_NS") } { Field("ER149AttorneyCocounsel_BarNumber") } 2. To a matter, assigned one entity with one role (e.g., Attorney -- Co-Counsel) and another entity with the other role (e.g., Assessor). Be sure that each entity has at least one bar number. 3. Merge the documents. Note that the Bar Number is the same for both Entity Role fields, and appears to use the value from the first entity assigned to the matter with one of the roles. This is wrong. The value that is pulled should be the first entity of that role, and the process repeated for each role, just like Date of Birth. <p>I also noticed that, when you are merging, it doesn't ask you to select a bar number for each role, even though the entity from which the bar number is pulled has multiple bar numbers. The sequence should be as follows:</p> <ol style="list-style-type: none"> 1. Merge the document. 2. From the first entity assigned with each role associated with the bar number field, select the bar number from that entity. 	8.7.40.1	AmFam	TF		2/18/03 11:39:33 AM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				2.1. If the entity has more than one bar number, display a pick screen for that entity role. 3. Repeat for each role					
Done	Document Assembly	Bug	14279	<p>When you merge a document with more than one type field group and include the bar number field, only the bar number for the first entity with the first type is being pulled in</p> <p>Comments: Steps to recreate: 1. Create a template with two different role field groups, each group containing Bar Number. For example: Entity Role / Attorney -- Co-Counsel: { Field("ET1002Adjuster_NS") } { Field("ET1002Adjuster_BarNumber") } Entity Role / Assessor : { Field("ET1004CourtReporter_NS") } { Field("ET1004CourtReporter_BarNumber") } } 2. To a matter, assigned one entity of one type (e.g., Adjuster) and another entity of the other role (e.g., Court Reporter). Be sure that each entity has at least one bar number. 3. Merge the documents. Note that the Bar Number is the same for both Entity Type fields, and appears to use the value from the first entity assigned to the matter of one of the types (a pick screen appears for the Entity Type group if the entity has more than one bar number). This is wrong. The value that is pulled should be the first entity of that role, and the process repeated for each type, just like Date of Birth. I also noticed that, when you are merging, it asks you to select a bar number for the</p>	8.7.40.1	AmFam	TF		2/18/03 11:42:33 AM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Entity Type group instead of a specific entity type. The sequence should be as follows: 1. Merge the document. 2. From the first entity assigned of the type associated with the bar number field, select the bar number from that entity. 2.1. If the entity has more than one bar number, display a pick screen for that entity type. 3. Repeat for each entity type.					
Done	Document Assembly	Info	14343	When making a copy of a document the Document Profile screen will sometime have buttons grayed out. Comments: It seems like if you change matter's law type and this law type doesn't have same Document Category->Document Type assignment, as previous law type, buttons will be grayed out (document opens fine and when click Profile, buttons are not grayed out) When you do not change matter's law type, but simply unassigned Document Type from this Law type and Document Category, buttons are not grayed out, but Type field is empty (I think this is not what we say on client's db, but this is what I get on my local db). This is probably correct behavior.	8.7.40.1	Bacon & Wilson	Mike G	25997	2/20/03 5:08:59 PM
Done	Document Assembly	Update	14465	Update the document profile so that the "Assemble with..." fields on the Profile default to the same component type as that of the default template Comments: This allows the HotDocs template to appear when it is set as the default. Right now, you have to actually	8.7		TF		2/26/03 1:18:29 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				click on "Assemble with HotDocs" in order to see the default template. -- If the default template for the assignment is a Practice Manager template, "Assemble Document with Practice Manager" would be selected. -- If the default template for the assignment is a HotDocs template, "Assemble with HotDocs" would be selected. -- If there is no default template assigned, "Assemble Document with Practice Manager" would be selected					
Done	Document Assembly Merge	Bug	14091	The problem with HotDocs. Comments: When create new document, select index (this index length is longer than 8 symbols) and merge with HotDocs template components, document is not merged. HotDocs Pro screen is invoked and merge process stopped.	8.7.40.1		Rasa		2/10/03 5:18:50 PM
Done	Document Assembly Merge	Bug	14232	Problem when try to copy HotDocs component. Comments: From Document Assembly Settings create e.g. HD template. Then try to copy this template. In Document Component Design screen click on Design button. Have got an error (see attachment). Click OK. After that template is created.	8.7.40.1		Rasa		2/14/03 11:25:03 AM
Done	Document Assembly Merge	Bug	14248	The problems with HotDocs. Comments: 1) When create new document, select index (this index has folder with space symbol, example C:\Practice Manager) and merge with HotDocs form component, document is not merged. With HD template component	8.7		Rasa		2/17/03 2:52:13 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				document is merged. 2) When PMWin root path is e.g. C:\Program Files\RealLegal\PRACTICE MANAGER\Practice Manager 87401\, then you cannot create new HD template of Form components.					
Done	Document Assembly Merge	Bug	14346	When you merge a document with more than one role and include the note fields, only the note for the first entity with the first role is being pulled in. Comments: 1. Create a template with two different role field groups, each group containing Note Description, Note Text fields. 2. To a matter, assigned one entity with one role and another entity with the other role. Each entity has at least one note. 3. Merge the documents. The Note Description and Text is the same for both Entity Role fields.	8.7.40.3		Rasa		2/21/03 10:06:22 AM
Done	Document Assembly Merge	Bug	14348	When you merge a document with more than one type and include the note fields, only the note for the first entity with the first type is being pulled in. Comments: 1. Create a template with two different type field groups, each group containing Note Description, Note Text fields. 2. To a matter, assigned one entity with one type and another entity with the other type. Each entity has at least one note. 3. Merge the documents. The Note Description and Text is the same for both Entity Type fields.	8.7.40.3		Rasa		2/21/03 10:06:22 AM
Done	Document DE	Bug	14120	Go to PMWIN document listing > select a document and click Copy > document	1.2.6.0		Arunas		1/30/03 11:34:41

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				profile window opens. Fill all the fields with the data related to DOCS Open integration > select Version Control checkbox > click Open Document. Comments: The system presents a question: "This document has Version Control. Do you want to open a New Version of the document?". Click Yes > create new version of the document. This just created document will not appear in DOCS Open. If I answer No to the previous question, then this newly created document will appear in DOCS Open.					AM
Done	Document DE	Info	13724	Message "Cannot Open File" is displayed when Document Profile is opened Comments: The application I am using is Windows Imaging. Comes with Windows 2000. After the conversion, those records do not open. I did not change anything in the application settings. The file format of the record I am trying to open is Jpg	8.7.38.1		Abe	139-764	1/22/03 6:36:45 PM
Done	Documentation/M anuals/Help	Update	14481	Update readme.txt with info regarding <PMROOT>\KOFAX_INS directory - see 14410	8.7.40.4		Donatas		2/26/03 3:44:42 PM
Done	Documentation/M anuals/Help	Update	14582	Create install and upgrade files for SP3, as well as update the release notes	8.7		TF		3/3/03 10:01:21 AM
Done	Install/ Upgrade	Update	14410	Include the new TiffView AIPE in the client install	8.7		TF		2/24/03 6:26:21 PM
Done	Install/ Upgrade	Update	14434	Include WFItemsCancelingInClosedMatters.exe utility into installs/ upgrades for 8.7.40.4	8.7		TF		2/25/03 5:00:25 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Done	Matter:Workflow	Feature	14396	<p>Create utility that would complete all plans and mark unscheduled and uncompleted items as cancelled for matters that are closed</p> <p>Comments: Let's add this to the SP2A utility folder as a self-extracting EXE, with the script inside it.</p> <p>The scope of the script should be as follows:</p> <ol style="list-style-type: none"> 1. Unscheduled Workflow Items in Closed Matters should be marked as Cancelled. 2. Uncompleted (not started or in progress) Scheduled Workflow Items in Closed Matters should be marked as Cancelled. 3. Plans in closed matters should be marked as complete. 4. Completed plans in closed matters should be scheduled for purging. 	8.7		Ricky		2/24/03 2:41:40 PM
Done	TiffView	Update	14358	<p>Update TiffView to save settings (similar to 13544)</p> <p>Comments: The Tiff viewer has the same problems that the image viewer had:</p> <p>A) it always opens in windowed mode, not full screen</p> <p>B) you need to manually expand the application</p> <p>C) then you need to manually expand the document (on every page!)</p> <p>D) then you need to tell it "Fit by width"</p> <p>E) and it does not "remember" these settings, so you have to do it all over again for every document you open</p>	8.7	Amfam	TF		1/17/03 5:07:15 PM
Done	Timeslip Listing	Update	13778	<p>User opens timeslip tab from within a matter. Recieves error message 'Either BOF or EOF is true or the current record has been deleted. Requested operation</p>	8.7.35.1	NFI Industries 0262	ken	25142	1/23/03 3:11:26 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				<p>requires a current record.'</p> <p>Comments: steps to recreate: Client opens a matter, goes to the timeslip listing for a given matter (ccbss). Upon opening the tab, they get the error message 'Either BOF or EOF is true or the current record has been deleted. Requested operation requires a current record.'</p> <p>From there, click on filters, choose no filter. Then go back and choose 'all' from 'in last days'. Timeslips can now be opened. Again though, if you tab out and then tab back in, you get the exact same message. Is the result consistent or randomly occurring? Consistent for the matter given. Random for others</p>					
Done	Utility	Update	14433	Update the start.htm and start.js pages in \\Ltd\devsql1\1D\QA\builds\pm\pm_v87sp2\build874004\files\utilities\ for the WFItemsCancelingInClosedMatters.exe utility	8.7		TF		2/25/03 4:59:19 PM
Done	Workflow Listing	Info	13564	<p>Go to workflow listing > click Printer icon > go to Customize tab. Preview button is active. Click [>>] button (assign all available fields) > Preview button becomes inactive. I need to restart Printing to make this button be active.</p> <p>Comments: [PMT\tom 1/19/03] Yes, was agreed that any customization for printing on any listing where a BLOB field is added -- in this case, Instructions and Notes -- the Preview button becomes disabled. If the user removes the BLOB fields as</p>	8.7.38.1		Arunas		1/18/03 1:33:08 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Selected Fields, then the Preview button is enabled.					
Final	Desktop Views	Info	13727	<p>On Next week and Next two weeks time frame under a heading called "Current" appear tasks which have the Due Date from current (i.e. although time is set to next week, today's, tomorrow's and etc. tasks appear under "Current").</p> <p>Comments: Under heading called "Current" shouldn't tasks which have the Due Date corresponding with selected time frame appear?</p> <p>In the FDS there is such paragraph: 'On the Today, This Week and Two Week Views, tasks where the Due Date has not yet occurred, based upon Today's date, should be grouped under a heading called "Current". Those tasks where the Due Date is before Today's date should be grouped under a heading called "Past Due".'</p>	8.7.38.1		Ligita		1/22/03 6:19:55 PM
Final	Document Assembly	Info	14577	<p>Receive Message "Word cannot open this document template" when trying to open fax template in forms.</p> <p>Comments: Also, when Trying to generate a blank letter with letterhead. Also, Trying to open up the letter to Clerk letter number 400-A document that had already been generated. I was adding on to the document. Also, when preparing profile to create a letter. Also, when preparing profile to create a letter. Also, trying to generate an BLANK document since the computer wouldn't let me generate a FAX cover sheet. Also, when Creating letters and memos; changing suspense dates</p>	8.7.40.1	AmFam	Mike G	Feedback	2/28/03 10:44:32 AM

Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Final	Document Listing	Info	14342	WordPerfect docs are no longer opening using word XP, but only if you try to open them from the listing. Comments: In document listing, find a document that was originally created in WP (office now uses word XP) and click on the open button on the command bar. Error message says that document cannot be found. Take that same document, open the profile and then click open document. Document opens fine. [Mike G] It appears that all these documents have path f:\ (lower case), if you look in Documents Global listing. But if you open a profile, path has F:\ (upper case).	8.7.40.1	Fuller, Johnson & Farrel	Mike G	25995,Feedback	2/20/03 5:01:57 PM

7. Scope – Exclusions

This report is taken from the PCR Database. It is all PCRs in SP3 that, as of March 04, had a status of Under Review, Not Applicable or Deferred. This list is subject to update, and the PCR Database always represents the latest and greatest version of this report.

The report is first sorted by Status, then Area, then Type and finally by ID.

There are additional fields available when this report is accessed from the PCR Database. Note that the links currently point to Thunder. This is only available if you connect to the PCR Database from the Lithuanian office or from the VPN. At the time this report was generated, there as no quick way to correct this. Future updates should have this corrected.

Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Under Review	Entity DE	Bug	13810	New DE forms created from Entity Related Tree view are opened behind the Entity DE window. Comments: Go to Entity DE Related Tree tab. Add new Entity relationship. In Relationship Properties window press on cowboy hat near Entity 2 Name field.	8.7.39.1		Ligita		1/24/03 8:17:07 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Create new entity record from opened Entity Listing window. Go to Related Tree tab of just created entity. Add new document - new Profile DE is opened behind the Entity DE window and is not accessible. Same problem when adding new Timeslips and Notes. [PMT\Tom 3/4/03] First, we need a time estimate for what it will take to fix this. Do not proceed with the work until the time estimate has been approved by me.					
N/A	Install/ Upgrade	Bug	14073	Review PM uninstall/install. Seems like it doesn't remove/update all files. Comments: I noticed a problem with PMConduit.dll during PM uninstall/install. When I uninstalled PM from my local machine, PMConduit.dll was not removed. When I installed build 8.7.40.1, PMConduit.dll was not updated (I have version 1.0.1.12 before and after installation.)	8.7.40.1		Mike G		2/7/03 5:11:42 PM
N/A	System Settings	Update	13472	Add new Preference: Open Document O Maximized O Normal Comments: Document - Merge Document and Open Document should respect this setting			TF		1/16/03 6:52:54 PM
On Hold	Matter Listing	Bug	14528	Not all matter-related items, mentioned in the message, appearing after choosing some matter for deletion, are deleted. Comments: When I choose to delete a matter, a message is displayed: 'Are you sure you want to delete the selected matter record(s) and all matter-specific items, including notes, documents, timeslips, groupware and workflow items?' If you choose 'Yes', everything is deleted	8.7.40.4		Sigita		2/27/03 3:58:28 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				except notes and workflow. I think, these two should then be removed from the info message.					
On Hold	Workflow DE	Bug	13765	<p>There is no way to get out of plan. Comments: PM 8.7.38.1 SQL Server: SRV1 DB Wilkes38 Add plan 'Trial'; set 'Trial' task date on current date; will be created 4 repeating items. Parent 'Trial' task has 12 linked actions. The Due Date of task 'Prepare/update bills, liens, med records, wage info, etc.' is set on 90 days before 'Trial' is due. Open 'Trial' task DE; go to Automatic scheduling tab and set 'Trial' task due date on 'Prepare/update bills, liens, med records, wage info, etc.' task is due. Hit save, answer YES on messages about date change of linked activities and OK about repeating activities. 'Weekend Date' window appears. It doesn't matter how many times you click OK button, the 'Weekend Date' window appears proposing to move activity's due date. Date in Scheduled date field goes backward. By clicking OK button on these windows, starting from year 2002 I got to year 1820 and they still appear. I had to kill PMWin.</p>	8.7.38.1		Ligita		1/23/03 2:47:21 PM
Deferred	Components	Feature	14199	<p>Use "No." consistently throughout PM (right now we have "#" and "Number"). Comments: The places below should be updated: Entity global – Timekeeper Number Document global – Version # Timeslips global – Matter #, Timekeeper Number</p>	8.7.40.1		Mike G		2/12/03 4:22:18 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Matter global Filter – labels: Matter #, Case #, Closed # Entity global Filter – label: All Phone #s Entity global query – Timekeeper Number Document global query – Version # Timeslips global query – Matter #, Timekeeper Number Groupware global query – CLIENTNUMBER, MATTERNUMBER Document Profile: Document Versions screen – Version number Note DE: Relate to Matters tab – Number (should be Client Matter No.) Note: Phone Call DE: Relate to Matters tab - Number (should be Client Matter No.)					
Deferred	Components	Bug	14413	When trying to resize Select Visible Columns screen, it changes screen size but doesn't actually resize Available Fields and Selected Fields. Comments: Right click on any listing and choose More Columns-> resize Select Visible Columns screen	8.7.40.3		Mike G; Ken F		2/24/03 1:59:01 PM
Deferred	Components	Update	13748	With WinXP, there is a problem with minimize, restore windows. Comments: Mike and I have both experienced this. We just work in pm for a while, then at some point PM will not minimize. There is a single instance of PM running.	8.7.38.1	Patten	Ken		1/22/03 3:42:45 PM
Deferred	Desktop Views	Bug	13669	Spelling error: message reads "Please go to Edit – Preferences – Views, and selected". Should be "select" Comments: Message : Error - Unable to Open desktop View.	8.7.38.1		Mike Girenko		1/20/03 4:00:37 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Deferred	Document Assembly	Bug	12376	<p>DB=Glasser87.Engine=Word97. Merge new document with doc asm component. All field are merged. Leave generated file opened. Create another document and use the same doc asm component. Merge. There are some fields not merged in this document</p> <p>Comments: [TAF 01/23/2003] There is not enough time in SP2 to get this coded and properly tested. It is potentially a high-risk fix, and a behavior that can be observed in Word when used outside of PM. Please note that part of the reason we did not have time to address this PCR in SP2 is because other PCRs, namely those involving AMFAM and Saga, were received late in the development cycle and superceded this one with respect to resource allocation. Also, this one was not reported by the field and it only seems to happen with Word97 on some OSs. If needed, we can look at this at a later date and update independently, as we believe the problem is in the WLL (similar to issues we were having in PMDAT.DLL early on).</p> <p>(these fields are displayed as code (ex. {Field("Mat_LongName")})).</p> <p>Exactly steps to recreate: Tested on QA-NT. DB=Glasser872. Engine=Word97. 1. Login to PM (Name = Rasa, password = r) 2. Hit New Document. 3. Select Outgoing document type. 4. View> Retrieve, select '_RM-W97' document template.</p>	8.7.33.1		Rasa		11/15/02

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				5. Hit Generate Document. 6. Word document is merged. All fields retrieved. 7. Leave this document opened and hit New Document button again. 8. From View> Retrieve, select '_RM-W97' document template. 9. Hit Generate Document. 10. Not all fields are retrieved.					
Deferred	Document Assembly Settings	Bug	14148	Document Component Design screen: with Win XP theme and 800x600 resolution, Aux label gets cut off (see screenshots)	8.7.40.1		Mike G		2/11/03 4:26:28 PM
Deferred	Document Assembly Settings	Bug	14150	Document Assembly Settings:Assignment tab – with Win XP theme and 800x600 resolution "No Assignments (DocTypes Only)" label gets cut off	8.7.40.1		Mike G		2/11/03 4:40:04 PM
Deferred	Document Assembly Settings	Bug	14152	Date Formatter screen (Document Assembly Settings: Option tab)-spelling error "Description and EXMPLE". Should be "Example"	8.7.40.1		Mike G		2/11/03 4:50:53 PM
Deferred	Document DE	Bug	13783	1) Open Document Versions screen (Profile DE> List Versions button) . When file does not exist, maybe Open Document button should be disabled like in Profile DE? Comments: 2) Also when open Document Versions screen of a document which SiteID is not the same as Active SiteID and Site Security is on, Edit, Delete buttons are enabled. When click on any, nothing happens. Maybe should be better, that these buttons should be disabled?	8.7.38.1		Rasa		1/24/03 9:13:21 AM
Deferred	Document DE	Bug	13794	Problem when create document and select Profile Only template.	8.7.38.1		Rasa		1/24/03

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Comments: For example: Create new document (not Profile Only), from View menu> Retrieve Template select Profile Only template. After that in Location field displayed just ' ' symbol. If I select other Index, the Location is not changed. I can select Document Assembly Template and try to generate document, have got MS Word error.					3:38:00 PM
Deferred	Document DE	Feature	14566	Add Check out/in functionality to documents. Comments: This is actually Document Management area Email from Jim Stewart 3/11/2002	8.7.35		TF		12/10/02
Deferred	Document DE	Update	14096	Entities Tab in document profile and assignments. See comments Comments: in 8.6.35.4 assignments under the entities tab in a document profile had to be made manually. There were no default assignments. In 8.7.40.1 it seems that Author/Creator are automatically assigned. Also - Every user that enters the entities Tab will be assigned. Is the last part linked to desktop views perhaps?	8.7		Ken	25741	2/10/03 1:40:03 PM
Deferred	Document Listing	Bug	13640	When open word document from Document listing, on Task Bar see that the first 'Document1' is opened, it disappear and after PM document opened.	8.7		Rasa		1/19/03 2:58:00 PM
Deferred	Document Listing	Bug	13788	The messages when file is not founded: Comments: 1) Site Security is on. When open Profile which SiteID is not the same as Active SiteID and file of this document does not exist, have got just a message 'Cannot edit record, because it does not	8.7.38.1		Rasa		1/24/03 10:24:48 AM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				belong to your Site' and some fields, buttons are disabled. I think that also should be displayed a message '... file is not found...' 2) Site Security is off. When open Profile which file does not exist, no message is displayed (I think should be a message '...file is not found...'). When click on e.g. List Versions, or click on Save button, the first have got message '...file is not found...' and then listing is opened. Should be no message displayed. (Like works when Site Security is on). 3) Site Security is off. In Document Listing select a document which is on other drive and drive mapping does not exist. Click on Open button; have got 'Directory does not exist...' Then click on Copy button, have got '...file is not found...' I think, that will be better if the messages will be the same.					
Deferred	Documentation/M anuals/Help	Update	13997	Update PMRemote manual	8.7		Aurelija		2/4/03 10:56:08 AM
Deferred	Entity DE	Bug	13668	When open Issue DE from Entity Related Tree, "Specific to this matter" checkbox should be disabled or invisible	8.7		Donatas		1/20/03 7:02:08 PM
Deferred	Entity DE	Bug	13812	When clicked Copy on Assign/Copy Parent Address screen the same address copied twice to the child entity Comments: Create organization entity and choose Parent Organization, on the Assign/Copy Parent Address click Copy one time and close it -go to Address tab - address copied twice.	8.7.39.1		Mike G		1/24/03 11:39:38 AM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
Deferred	Entity DE	Bug	13819	Hourly Billing Rate screen-OK and Cancel buttons get cut off, when Display Properties:Theme set to WinXP (800x600 resolution) Comments: Entity DE:Rates tab -> click New	8.7.39.1		Mike G		1/24/03 5:39:22 PM
Deferred	Entity Listing	Bug	14214	Go to Global Matter listing, make first column in focus > type-search anything > click Escape button and go to Global Entity listing until Matter Listing is not refreshed > make first column in focus > type-search anything. Comments: Actually now focus remain in Global Matter listing, but you do not see it. And you do not see what you type-search, because it all appears in Global Matter listing. I suppose the same happens with all listings. This is easy to recreate on big databases.	8.7		Arunas		2/13/03 1:15:11 PM
Deferred	Entity Settings	Bug	14054	Go to Address Description tab > click New > enter new address description and click Enter > system asks if I really want to cancel. Usually clicking Enter is accepted as clicking OK, not Cancel.	8.7		Arunas		2/7/03 2:28:01 PM
Deferred	Entity Settings	Bug	14438	Role Assignment Filter – “Side” checkboxes do not respect Law Type or Role settings Comments: Entity Settings: Assign Role or Assign to role tabs-click Listing button-on the role Assignment Listing screen click Filter button- Role Assignment Filter screen: if you filter by Law Type or Role, it works fine; but if you filter by Law Type and check any checkboxes (N, P, or C), results will be filtered by Side only, not by	8.7.40.3		Mike G		2/25/03 11:53:39 AM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Law Type and Side.					
Deferred	Entity Settings	Update	14242	In new database ENNTYPE.SHOWLINKEDTO is NULL for "Other" type, therefore Show Employer/Parent organization checkbox is grayed in Entity Type DE Comments: When entity created with "Other" type, Parent Organization field is not shown in Entity DE	8.7		Donatas		2/14/03 5:22:58 PM
Deferred	General	Bug	14146	Record ID should be added to the following listing as available column (see comments) Comments: Document Global Timeslips Global Note Global Groupware Global – there is Message ID Workflow Global Matter: Document listing Matter: Timeslips listing Matter: Note listing Matter: Groupware listing - but there is Message ID Matter: Issues Matter: Workflow Matter: Annotations Matter: Tree View: Sorting and Grouping screen - only Matter and Entity has Record ID Entity: Related Entities Entity: Related Tree – only Matter has Record ID as Available field Entity Merge Utility – it is called ENTITYID The following listings have Record ID: Matter Global Entity Global Matter: Entity listing	8.7.40.1		Mike G, Ken F		2/11/03 1:56:43 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Matter: Assign Entity wizard Entity: New Relationship Properties screen: Entity Listing Document Profile: Matter listing Document Profile: Entity listing Timeslips: Matter listing Workflow Item: Matter listing					
Deferred	Groupware DE	Bug	14235	Message displayed when user does not has access to his e-mail folders is not entirely correct. Comments: If user for some reason does not has access to his e-mail folders, message is displayed advising "...To add a location, click the Tools menu, click Services..." If possible, message should say that it is the Outlook menu where user has to click to correct this situation	8.7		Donatas		2/14/03 11:59:26 AM
Deferred	Groupware Listing Query	Update	13277	In Groupware Listing Query some of query fields are in all capital letters: BEGINTIME, CLIENTNUMBER, ENDTIME, MATTERNUMBER.	8.7.38.1		Ligita		1/10/03 3:04:58 PM
Deferred	Guideline	Bug	14390	Review ability to check/uncheck "Public Template" checkbox on templates within Admin settings Comments: It appears that only template creator is able to check/uncheck Public Template checkbox on Groupware template. However, it seems like it is inconsistent throughout Admin settings. Matter Settings - only creator (and if not creator, check box not displayed at all) Entity Settings - only creator (and if not creator, check box not displayed at all) Documents Settings – not only creator	8.7.40.3		Mike G		2/21/03 2:11:26 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				(with required security rights) Timeslips Settings - only creator (and if not creator, check box not displayed at all) Note Setting - not only creator (with required security rights) Groupware Settings - only creator (and if not creator, check box is grayed out) Workflow Settings - not only creator (with required security rights)					
Deferred	Imageview	Bug	13792	There is no Scanner. Open document with Image Viewer, select Scan menu> Pager, check any radio button and hit OK. Have got error screen without any text, just OK button.	8.7.0.24		Rasa		1/24/03 3:17:22 PM
Deferred	Imageview	Bug	14114	Run ImageViewer without Pmwin. Enter Login name which not exist, hit OK, have got 'Invalid object names 'Entities'.	8.7.0.24		Rasa		2/11/03 3:48:20 PM
Deferred	Imageview	Bug	14116	Run ImageViewer without Pmwin. Hit Cancel in Login screen, have got an access violation. After that ImageViewer runs and all buttons are enabled.	8.7.0.24		Rasa		2/11/03 3:48:20 PM
Deferred	Imageview	Bug	14118	Rum ImageViewer without pmwin. Not enter anything in login screen and hit OK, have got 'Parameter object is improperly defined. Inconsistent or incomplete information was provided'. Hit OK, have got access violation.	8.7.0.24		Rasa		2/11/03 4:02:58 PM
Deferred	Imageview	Bug	14133	Run ImageViewer without Pmwin. Incorrect tab order in Login screen. Should be 1-Login, 2-Password, 3-OK, 4-Cancel.	8.7.0.24		Rasa		2/11/03 4:31:04 PM
Deferred	Imageview	Bug	14135	Run ImageViewer without PM (go to <root>\ImgView\ and double click on imgv32.exe). ImageViewer connecting to	8.7.0.24		Rasa		2/11/03 4:41:53 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				default database of SQL Server user. Maybe Viewer should be taken the connection from pmwin.udf?					
Deferred	Imageview	Bug	14155	OCR from Image Viewer: Comments: There is no Application that has set OCRed (Document Settings> Application tab> Application DE). Open document with Image Viewer and select File> OCR. Fill new created Profile DE (in Application field displayed the first Application from Document Settings> Application tab), click on Open Document button, have got 'Cannot focus a disabled or invisible window'.	8.7.0.24		Rasa		2/12/03 10:54:53 AM
Deferred	Imageview	Bug	14222	Open document with ImageViewer. Go To File menu and select Close Image. Document is closed. Then hit on Next/Previous Page button. Have got 'Login failed for user" '.	8.7.0.24		Rasa		2/13/03 2:50:45 PM
Deferred	Imageview	Bug	14514	From PM create document with ImageViewer. When Viewer window opens, minimize it and hit again Open Document button in Document Profile DE. Return to ImageViewer window. The document is closed and have got an error 'Login failed for user'.	8.7.0.24		Rasa		2/27/03 1:05:53 PM
Deferred	Mail Merge	Bug	13815	Mail listing screen opens with scroll bars Comments: Go to Tools->Mailing Lists->with Mailing lists tab open click New->Mailing lists screen opens with scroll bars. It appers that this is only happning when you have Display Properties: Theme set to Win XP	8.7.39.1		Mike G		1/24/03 4:42:23 PM
Deferred	Mail Merge	Bug	13817	Tools: Mailing Lists: Assign Lists or Assign Entities tabs-column headings	8.7.39.1		Mike		1/24/03

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				should be loaded, when you open this listings first time Comments: Go to Tools: Mailing Lists -> click on Assign Lists or Assign Entities tabs.			Girenko		5:04:33 PM
Deferred	Matter DE	Feature	13971	Increase size of Matter Search Name to 100 characters Comments: Shriners has a feature request to increase the size of the mater search name to 100 characters. The business need is listed below. Hi Cynthia. Below is a new procedural email that went out to the department from our Filing Dept. regarding codes they are having to put in the Search Name field primarily because of Check Logger screen where they have to choose Matter 001 from to enter the asset. Please read below and you'll understand. I'll look for some examples of matters where we add additional info. in the Search Name and send them, however, this email may be enough for you. If you have a long matter name and need to further identify it, you have only 50 or so characters to type in. If it's not effecting anything else, could it be changed to 100? Our outside auditors require that all checks and wire transfers be entered into one Matter in PM (001 in almost all cases), and in Check Logger. In Check Logger, multiple Matters with the same name are shown in the field from which the file clerks select the Matter, but the file clerks cannot see the Matter Number (001), making it neccessary to open each Matter to distinguish which one is correct.	8.7.40.1	Shriners 0209	Cynthia K; Mike G		1/31/03 2:51:38 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				<p>To help identify the Matter a check has been entered into the clerks will be adding a "\$" sign next to the Search Name to make it easier when the next check or wire transfer is received.</p> <p>Also, the file clerks enter other codes in the PM Search Name to help determine if mail goes to the Accounting Department or Development Department, or if a file has been retained in the basement. These include RETAIN, INCOME TRUST, IT, NO INTEREST, DONATIONS, RE (real estate), and MINERAL. A few codes you may be more familiar with are xref, aka, fka, etc. If there is not enough room in the Search Name, the file clerks enter this information in the Closed Number box.</p> <p>[TF 02/28/2003] This is very complex to implement due to the way Delphi5 handles the field attributes in the UI</p>					
Deferred	Matter:Issues	Bug	14437	<p>1. If open issue from matter:issue tab, it is not matter specific. If open the same issue from entity:related tree tab, it is matter specific.</p> <p>Comments: E.g. open matter:issue tab and create not matter specific issue. Assign an entity to this issue. Close. Go to entity listing and open assigned entity. Got to Related Tree tab, expand Issues branch - this issue does not has checkmark 'Matter-Specific'. Open this issue DE from issue branch. In Info tab is checked 'Specific to this Matter'.</p> <p>2. If open issue from entity:related tree tab, then in Title Bar you not see description of this issue</p>	8.7.40.3		Rasa, Ken F		2/25/03 11:22:44 AM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				[DB] This is because when opening Issue from Entity DE Related Tree another instance of Issue is created. When open Issue DE from Entity Related Tree, Specific to this matter checkbox should be disabled or invisible [Mike G] Per Ken F, this is priority A PCR and should be fixed in SP3					
Deferred	Matter: Issues	Update	13667	Review the matter-specific issue functionality	8.7		Donatas		1/20/03 6:54:44 PM
Deferred	Phone Call DE	Bug	13740	When creating New Phone Message from entity global listing Phone Message DE form opens with no current user selected in the User field Comments: Entity global listing->right click and choose New Phone Call:Phone Message->User field is empty.	8.7.38.1		Mike G		1/22/03 10:48:42 AM
Deferred	Query	Bug	13749	When Query open and you choose Date of Birth, when you delete last digit and click Apply, you receive "The conversion of a char data type..." message Comments: Entity global listing->click Query and choose Date of Birth from drop down->delete last digit from the displayed date->click Apply-> message displayed Related info: if I am deleting last digit from Date of Birth on the Entity's Other Details tab and clicking Save, I am getting "Entered Date is not valid date in SQL server"	8.7.38.1		Mike G		1/22/03 3:30:40 PM
Deferred	System Settings	Bug	13758	When time separator in system settings is changed to /, and I am trying to change time of existing Phone Call, I am getting "Entered date is not valid in SQL server"	8.7.38.1		Mike G		1/22/03 4:35:13 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				error. Comments: Note Listing-> New Phone Call:Place a Call->enter required info and save it->go to System Setting and change time separator to / ->open same Phone Call, change time of this Call (input valid time) and click Save->"Entered date is not valid in SQL server" error shows up.					
Deferred	System Settings	Bug	13804	Go to System Settings > Click Date /Time Format Field cowboy hat button > Time Formatter window appears. I see Date Format before Time format in Time Format window. This should not be so - there must be only Time Format.	8.7		Arunas		1/24/03 7:21:04 PM
Deferred	System Settings	Bug	14112	The matter numbering system is going haywire, creating matters with duplicate numbers since the year rolled over. LSNT has Matter Numbering in "Interactive" mode with annual recycle selected Comments: PM Ver. 8.6.35.4 with LSM Intake ver. Intsheet.exe 8.6.33.18	8.6	LSNT	Josh Berlin	24325	2/11/03 1:03:00 PM
Deferred	TiffView	Bug	14121	Run TiffViewer without Pmwin. Enter Login name which not exist, hit OK, have got 'Invalid object names 'Entities'.	8.7.2.23		Rasa		2/11/03 4:22:48 PM
Deferred	TiffView	Bug	14126	Run TiffViewer without Pmwin. Hit Cancel in Login screen, have got 'No such interface supported'. After that TiffViewer runs and all buttons are enabled.	8.7.2.23		Rasa		2/11/03 4:26:48 PM
Deferred	TiffView	Bug	14129	Run TiffViewer without Pmwin. Enter Login>Password, hit OK, have got 'No such interface supported'. After that TiffViewer runs.	8.7.2.23		Rasa		2/11/03 4:31:04 PM
Deferred	TiffView	Bug	14131	Run TiffViewer without Pmwin. Incorrect tab order in Login screen. Should be 1-	8.7.2.23		Rasa		2/11/03

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				Login, 2-Password, 3-OK, 4-Cancel.					4:31:04 PM
Deferred	TiffView	Bug	14137	Run TiffViewer without PM (go to <root>\ImgView\ and double click on imgv32.exe). TiffViewer connecting to default database of SQL Server user. Maybe Viewer should be taken the connection from pmwin.udl?	8.7.2.23		Rasa		2/11/03 4:41:53 PM
Deferred	TiffView	Bug	14224	Open document with TiffViewer. Go To File menu and select Close Image. Document is closed. Then hit on Next/Previous Page button. Have got 'Login failed for user' .	8.7.2.23		Rasa		2/13/03 3:17:21 PM
Deferred	TiffView	Bug	14511	From PM create document with TiffViewer. When TiffViewer window opens, minimize it and hit again Open Document button in Document Profile DE. Return to TiffViewer window. The document is closed and have got an error 'Login failed for user'.	8.7.3.25		Rasa		2/27/03 12:59:03 PM
Deferred	Workflow Settings	Bug	14321	Activity Type drop down list has a spelling error. Comments: Workflow Settings: Activity Templates tab-> open new Activity Template and go to Linked Actions tab-> click New Action->expand Action Type: 1. "Create a Entity Record" should be changed to "Create an Entity record" 2. "Create a time slip record" should be changed to "Create a Timeslip record" 3. "Create a workflow record" - "Workflow" needs to be capitalized 4. "Create a matter" - "Matter" needs to be capitalized 5. "Create a note" - "Note" needs to be capitalized	8.7.40.1		Mike G		2/19/03 2:54:04 PM

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Status	Area	Type	ID	Description/Comments	Found In	Site	Contact	Support Tickets	Reported
				6. "Execute a program function" - "Program" needs to be capitalized					
Deferred	Workflow Settings	Bug	14456	Workflow Settings: Activity Templates tab- Type column should be renamed to Category Comments: It is Category, if you look on Activity Template or look on Workflow Global listing	8.7.40.3		Mike G		2/25/03 4:51:49 PM

8. Project Organization

The project described by this document falls into the standard category of a software deliverable. The project is organized into three levels of responsibility. The product level, program level, and project level.

At the project level the schedule and day to day details of the project are managed by a Project Manager. The responsibility of the primary deliverable (the software program) is managed by a Program Manager. The responsibility of the product suite to which the program will be part of, the programs relationship within that suite, and external material such as marketing, application support, and client relations are managed by the Product Manager.

The typical workflow of a software deliverable starts with the Product Manager scheduling a kick-off meeting with the primary participants in order to discuss requirements, issues, and product strategy. If the decision is to undertake the project then a Subject Matter Expert constructs a Functional Requirement Specification (FRS) to communicate the goals of the project be it a new undertaking or an update of an existing program. The purpose of the FRS is to ask "what" needs to be included and "why". It will not describe "how" a particular item will be implemented nor can it be viewed in terms of a project. The product of the (FRS) may encompass multiple projects spanning several release cycles and several years.

The assigned Program Manager then coordinates with the Subject Matter Expert in constructing a Program Summary Specification (PSS). When the inclusions, exclusions, estimated resources, estimated budget, estimated duration, and preliminary plan have been approved the Functional Design Specification (FDS) is produced in order to communicate "how" an item will be functionally implemented.

The Program Manager will coordinate with other resources at his/her disposal in order to clarify the project to the Project Manager and Project Lead. The Technical Analyst and Quality Assurance Manager are two such resources that are available to the Program Manager. A Technical Design Specification (TDS) developed by the Technical Analyst may be required of some projects in order to communicate the suggested architecture, data model and technical solution to the developers. The technical review process is important in order to keep consistency in the product suite.

The Program Manager then coordinates with the Project Manager to schedule resources for a project kick-off meeting at which time the project plan can be viewed as a reliable estimate. When the Lead Developer completes the coding process the program is turned over to Quality Assurance as many times as necessary to root out all A, B, and C bugs which correspond to the level of quality required for an (A)lpha, (B)eta, and (C)ertification cycle release.

At the conclusion of the certification cycle the program can be released to the Product Manager which will oversee training and distribution.

9. Roles / Responsibility

Position / Project Role	Participant / Person	Project Responsibility
Product Manager	Ricky Huszagh rickyhuszagh@reallegal.com	<ul style="list-style-type: none"> Review and comment on project deliverables. Monitor project progress.
Subject Matter Expert	Not Applicable	<ul style="list-style-type: none"> Functional Requirement Specification. Review and comment on project deliverables.

Position / Project Role	Participant / Person	Project Responsibility
Program Manager	Tom Foley tfoley@reallegal.com	<ul style="list-style-type: none"> Review and comment on all project deliverables. Project Summary Specification. Functional Design Specification.
Project Manager	Tom Foley tfoley@reallegal.com	<ul style="list-style-type: none"> Review and comment on project deliverables. Project Plan
Graphic Design Lead	Tom Foley tfoley@reallegal.com	<ul style="list-style-type: none"> Functional Design Mockups
Quality Assurance Manager	Ken Fusco kfusco@reallegal.com	<ul style="list-style-type: none"> Test Plan
Technical Analyst	Saulius Kundrotas saulius@pmt.lt Darius Kirna darius_k@pmt.lt	<ul style="list-style-type: none"> Review and comment on project deliverables. Technical Design Specification
Technical Writer	Tom Foley (Release Notes and Install) tfoley@reallegal.com Cynthia Hobday chobday@reallegal.com	<ul style="list-style-type: none"> User Manual, Install Guide, Release Notes
Lead Developer	Saulius Kundrotas saulius@pmt.lt	<ul style="list-style-type: none"> Review and comment on project deliverables. Turnover to Quality Assurance
Lead Quality Assuror	Donatas Barakauskas donatas@pmt.lt	<ul style="list-style-type: none"> Review and comment on project deliverables.

10. Scope Management

The functional scope of the project is finalized when the FDS is certified. A functional feature that is not specified before the certification of the FDS will not be included unless the Product Manager certifies the inclusion and the Project Plan is updated. This scope creep is allowable if a situation arises that requires the inclusion in order to meet customer demand or satisfy a strategic purpose.

If a functional item is generated from one of the following statements without meeting any higher purpose then it does not qualify to be included: "wouldn't it be nice if we added this", "we did that so why not this too..." or "it does that but it would be better if it did this instead".

At each stage of development reasons for scope creep work their way into a program primarily because foreseeing all options is a difficult if not impossible task. However, in order to meet deliverables, stay on budget, and within the given timeline some functional requests must be deferred or discarded permanently.

A different form of scope creep is technical scope creep. Technical decisions and architecture can often impact the duration of a project and in some cases can be viewed as providing functionality to the program. These decisions often cannot be made at the time that the functional feature set is locked down and therefore are permissible and expected to some extent.

11. Scope Management

The risk to this project has been quantified based on the estimated project duration of [xx] days described later. The reader may use the last column of the following table in order to rank each risk by its total impact on the project. The project should be planned around the top 20% of the risks listed in the following table. Using this rule the most critical decision for planning this project is [....]

ID	Risk	Effect	Mitigation	Probability	Impact	Exposure
1	Number of PCRs to be included in the release increases.	Coding and testing time will be increased.		75%	Unknown	Unknown

12. Issue Tracking Management

Any issue that arises during the course of the project must be routed to the Program Manager along with possible resolutions. The Program Manager will coordinate with the available resources in order to resolve the issue and will notify the Project Manager of any slippage in the schedule that will result. If the issue cannot be resolved then an alternative solution will be presented to the Product Manager if that solution effects the functionality that was certified at the onset of the project.

13. Quality Review Management

Certified functional items will be entered into the internal tracking system at the onset of development. Any item originating from scope creep will be entered into the internal tracking system at the moment the item is certified. Quality Assurance will enter items during the test cycle phase. Any item that hinders the functionality of the program without a possible workaround is assigned (A) priority and must be resolved before the product can enter beta phase. An item that hinders functionality of the program but is able to be worked around is assigned (B) priority and must be resolved before the product can enter the certification phase. An item that does not hinder the functionality of the product is assigned (C) priority and must either be resolved before the product is certified or deferred to a later release.

14. Monitoring Mechanisms

The Team Leader or Lead Developer if the Team Leader is absent is responsible for communicating all issues to either the Project Manager or Program Manager depending on the nature of the issue and for delivering a status report at the conclusion of each week. The Project Manager is responsible for communicating slippages to the Program Manager at least twice a week. The Program Manager is responsible for collaborating with all available resources and giving a status report to the Product Manager once each week.

Mechanism	From	To	Frequency
Status Report	Team Leader / Lead Developer	Program Manager	Every Friday
Predicted Issue Report	Team Leader / Lead Developer	Program Manager	Conclusion of Alpha Development
Project Report	Project Manager	All	Every Tuesday
Status Report	Program Manager	Product Manager and Product Manager Internal	Every Wednesday

Mechanism	From	To	Frequency
Phase Review	Program Manager	Subject Matter Expert	Conclusion of Alpha Development
Turnover Notice	Team Leader / Lead Developer	All	Conclusion of Cycle Development
Published Notice	Project Manager	Program Manager	QA Acceptance of a Turnover

15. Deliverables

The project is divided into multiple stages and multiple phases. The term *phase* is used to describe a portion of the project cycle as well as the division of functionality among multiple releases. In the following table the term *phase* represents a portion of the project and not a release. This plan covers only the tasks required to complete this release.

Phase	Stage	Responsibility	Deliverable(s)
Planning Phase	Program Initialization	Product Manager	<ul style="list-style-type: none"> Project Proposal / Meeting Needs Requirement
		Subject Matter Expert	<ul style="list-style-type: none"> Functional Requirement Specification
		Program Manager	<ul style="list-style-type: none"> Project Summary Specification
		Technical Analyst	<ul style="list-style-type: none"> Technical Impact
		Practice Manager Program Manager	<ul style="list-style-type: none"> Impact Assessment
Analysis Phase	Functional Design	Program Manager	<ul style="list-style-type: none"> Functional Design Specification
		Quality Assurance Manager	<ul style="list-style-type: none"> Test Environment Design & Plan
	Technical Design	Technical Analyst	<ul style="list-style-type: none"> Technical Design Specification Data Model
Development Phase	Project Initialization	Project Manager	<ul style="list-style-type: none"> Resource Allocation Development Plan
	Coding	Lead Developer	<ul style="list-style-type: none"> Source code & compiled code Predicted Issue Report
	Testing	Quality Assurance	<ul style="list-style-type: none"> Issue Report
	Conclusion	Program Manager	<ul style="list-style-type: none"> Project Post-Mortem

16. Project Plan

The following links to the external Microsoft Project 2000 Project Plan.

http://pm.reallegal.com/reallegal/download/rd/schedules/current_development_scheduled.html

17. High-Level Project Plan

The following table outlines the high-level milestones developed for this release of Practice Manager v8.7 SP3 (phase one). The exact dates will not be known until the development schedule is produced.

ID	Phase / Stage	Duration	Days In	Planned Finish	Slippage	Actual Finish
1.	Planning	5 days		03/05/2003		
2.	Analysis	N/A	N/A	N/A	N/A	N/A
3.	Initialization	N/A	N/A	N/A	N/A	N/A
4.	Alpha Coding and Testing	N/A	N/A	N/A	N/A	N/A
5.	Beta Coding and Testing	32 days		04/22/2003		
6.	Acceptance	8 days		04/28/2003		
7.	Availability Announcement	1 day		04/29/2003		
8.	Orientation	1 day		04/30/2003		

A shell detailed project file is available at the following link:

<http://pm.reallegal.com/reallegal/download/rd/schedules/rl.pss.schedule.mpp>.