

Practice Manager - Pumasillo Project

Project Summary Specification v2.0

Created on March 21, 2003
by Thomas A. Foley

Revision No. 9

Last Saved on March 21, 2003
By Thomas A. Foley

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documents\rl.stuff\dev\pm_core\andes\pm88.pumasillo\specs
\pumasillo_pss_v0200.doc

RealLegal

Practice Manager™

Practice Manager - Pumasillo Project • Project Summary Specification v2.0

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Comments	

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Comments	

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Name/Title	Cynthia Kutka
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Comments	

Name/Title	Gedas Kutka
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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
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Comments	

Name/Title	Ron Coffee
Signature/Date	
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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
01.00	03/04/2003	Tom Foley	Original Version
01.01	03/06/2003	Tom Foley	Updated with New PCRs entered 03/05 and 03/06. Updated PCR Counts. Updated the schedule.
02.00	03/21/2003	Tom Foley	Merging of Pumasillo (PM87 SP3) with the Chimborazo Code Base (Alpha2).

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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 Project Summary Specification v2.0	See page C.	Tom Foley	03/04/2003
Functional Requirement Specification for Project Summary Specification v2.0	Not applicable.	N/A	N/A
Functional Design Specification for Project Summary Specification v2.0	Not applicable.	N/A	N/A
Technical Design Specification for Project Summary Specification v2.0	Not applicable.	N/A	N/A
Technical Design Specification for the Project Summary Specification v2.0 Data Model.	Not applicable.	N/A	N/A
Test Plans for the Project Summary Specification v2.0	http://pm.reallegal.com/reallegal/download/pm/pumasillo/kx/testplans/	QA	
Development Schedule for the Project Summary Specification v2.0	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/pumasillo/kx/turnover/	Saulius	
Lead Problem Report for the Project Summary Specification v2.0	http://iowa.pmt.lt/bugs/scripts/BugListing.asp?UPD=0&RESPONSIBLEID=-1&LOGIN=&APPLICATIONID=45&WHERE=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=45&WHERE=report.APPLICATIONID%20%3D%2072%20&ORDER=Status%2C%20Areas%2C%20Type%2C%20ReportID	QA	Updated Constantly
Meeting Minutes for the Project Summary Specification v2.0	http://pm.reallegal.com/reallegal/download/pm/pumasillo/kx/other/	Tom Foley	

Title	Files can be found in...	Author	Date
User Manual for the Project Summary Specification v2.0	http://pm.reallegal.com/reallegal/download/pm/pumasillo/kx/doc&help/	TechComm	
Install Guide for the Project Summary Specification v2.0	http://pm.reallegal.com/reallegal/download/pm/pumasillo/kx/doc&help/	Tom Foley	
Project Summary Specification v2.0 Beta Screenshots for Marketing	Not applicable.	N/A	N/A
Project Post-Mortem for the Project Summary Specification v2.0	http://pm.reallegal.com/reallegal/download/pm/pumasillo/kx/other/		
Release Page	http://pm.reallegal.com/reallegal/home/pm/pumasillo.htm	Tom Foley	Last Update: 03/17/2003

In addition, each of the following integrations has a similar document set that may contain information pertinent to this release, as these integrations will be fully supported by Pumasillo:

1. Authentication Service
2. DocsOpen Integration – Necessary changes were originally made in PM v8.6, though additional requirements could surface during development and testing.
3. Exchange/Outlook Integration – Some changes were originally made in PM v8.6, but additional changes will need to be made in Pumasillo.
4. Full Text Search – Necessary changes were originally made in PM v8.6, though additional requirements could surface during development and testing.
5. iManage Integration – There are no known changes at this time to support this integration.
6. Integration Engine FDS – Necessary changes were originally made in PM v8.6, though additional requirements could surface during development and testing
7. Lotus Notes Integration FDS
8. OCAWatch FDS – Necessary changes were originally made in PM v8.7, though additional requirements could surface during development and testing
9. PCA v3.0 FDS – Necessary changes were originally made in PM v8.7, though additional requirements could surface during development and testing
10. Portal Integration v1.0 FDS
11. Reporting v1.0 and v2.0 FDSs – No changes have been indicated as being required for this module, though changes could surface during development and testing
12. Schedule Service FDS – Necessary changes were originally made in PM v8.6, though additional requirements could surface during development and testing.

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

Pumasillo is an incremental release of Practice Manager, based on a new code base – Chimborazo – that includes a new authentication service that will be used for authenticating users and their permissions when accessing the product. This authentication service provides a unified way for all Practice Manager modules and integrations, as well, including those that are specifically designed for the Internet.

The Chimborazo code base, on which Pumasillo was built, was split from the PM87 code (Salado) prior to the completion and release of PM87. This means Pumasillo not only consists of new work, but also consists of PCRs that had to be entered in two code bases. The source of those PCRs are as follows:

- From PM87 (Salado)
 - 43 Bugs
 - 5 Updates
- From PM87 SP1 (Corazon)
 - 143 Bugs
 - 5 Features
 - 7 Info
 - 85 Updates
- From PM87 SP2, SP2A and SP2A EBFs
 - 121 Bugs
 - 4 Features
 - 13 Info
 - 53 Updates

In addition to replicating these PCRs from one code base to another, the following new work is also included:

1. Changing the Login process to use the RealLegal Practice Manager Authentication Service v1.x.
2. Inclusion of the Integration Engine v1.x install and upgrade programs in the core Practice Manager install and upgrade programs.

3. Modification to the Functional Security UI to differentiate between core Practice Manager operations and Integration Operations in the Available and Assigned Operations panel of the Assign Functions tab (use of a TreeView is the logical course for this).
4. GMT/UTC Preparation – System Level, requiring the following fields be added (these will be respected in future releases of Practice Manager and used by the Exchange and Lotus Notes Integrations, as well as the Portal Module):
 - a. a. System Settings
 - i. Database Server – Time Zone
 - ii. Database Server – Automatically Adjust for Daylight Savings Time
 - b. b. Sites
 - i. Time Zone
 - ii. Automatically Adjust for Daylight Savings Time
5. FormsDesigner rendering code has been removed from the Practice Manager core code, allowing the independent development of FormsDesigner. For Pumasillo, version 3.5 of FormsDesigner will be released in parallel, though the files will be installed as part of the Pumasillo install and/or upgrade. Going forward, FormsDesigner will have its own install and upgrade programs as new versions become available.
6. Support for the following integrations and modules, when available:
 - a. Asbestos Module
 - b. Audit Engine
 - c. DocsOpen, with the Security
 - d. Exchange 2000 and Outlook 2000/XP (Workflow)
 - e. Full Text Search
 - f. HotDocs 5.3
 - g. Integration Engine
 - h. Legal Services Module
 - i. Lotus Notes (server for workflow and client for groupware)
 - j. NTFS Security
 - k. OCAWatch
 - l. PCA 3.0
 - m. Portal 1.0
 - n. Reporting 2.0

Please note that the designation for the released version of this project has not been determined as of March 21, 2003. There are two schools of thought:

1. Use PM v8.7 SP3 – Because, from a user perspective, the new work represented in this release, for the most part, simply represents a minor incremental change in the functionality of the product.
2. Use PM 8.8 – Because, from a product perspective, the addition of the authentication services, combined with the original scope of work AND the new SP3-type PCRs, this is a more substantial release than originally planned. Also, it will be important to be able to differentiate what kind of authentication is being used – the authentication available in PM v8.7 and earlier or the new authentication. Being able to reference PM v8.8 versus all other releases will be much easier.

5. Project History (Builds)

See <http://pm.reallegal.com/reallegal/download/pm/pumasillo/kx/turnover/>.

6. Scope – Inclusions – New Work

This report is taken from the PCR Database. It is all PCRs in Pumasillo that, as of March 21, had a status of On Hold, Under Review Pending, Done or Final, that are new items added since PM87 SP2. 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 Area, then Type and then 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.

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Auxiliary Settings	Feature	14743	Add a new Desktop auxiliary item to support PCR 14741		TF	
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		Mike G	
Components	Bug	14501	Receiving message "Warning, YOUR connection to the database dropped" when attempting to set a Default Filter in Matter Settings	AmFam	Mike G	Feedback
Components	Bug	14734	Receiving Message "Access violation at address 007ED65E in module 'PMWIN.exe'. Write of address 000000E0"	Wilkes McHugh	Mike G	Feedback
Components	Info	14808	Columns are being resized continuously (blinking) in Entity listing. Trying to save grid layout in this situation causes an error message "Cannot insert duplicate 'LSTSET' with unique index 'LSTSET_UNIQUE' "		Neringa	
Components	Update	4852	Date format is mm/dd/yyyy. Enter 33/22/1111 > System says that 1111/33/22 is not valid date. Date format is not the same.		Arunas	
Database	Bug	10916	REEnterprise integration with PM: There are not deleted assignments in REEnterprise.		Vitalius	
Database	Bug	10919	REEnterprise integration with PM: For WebONLY user are created SQL login, but user can't login to PMWIN.		Vitalius	
Database	Bug	12324	Open Administration>System Settings>Error : dbchbEnableDesktopViews: field'ENABLEDESKTOPVIEWS' not found		Ken	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Database	Bug	13253	AUX_ fileds are missing from Entity's Global Listing query.	Glasser & Glasser - 0185	Mike G	
Database	Info	10358	RealLegal Authentication Service 1.0 Requirement for SP1.		Tom	
Database	Info	14176	Paths in different PMWin places are not of the same length.		Donatas	
Database	Update	9785	Portal Requirements for SP1 - Data Structure to Allow Timeslips to be Related to Multiple Matters.		Tom	
Database	Update	9786	Portal Requirements for SP1 - Data Structure to Allow Workflow Items to be Related to Multiple Matters.		Tom	
Database	Update	9787	Portal Requirements for SP1 - Data Structure to Allow Groupware Items to be Related to Multiple Matters.		Tom	
Database	Update	9788	Portal Requirements for SP1 - Update Related Tree in Matter to respect TIMMATAS, MRULMATAS and RULMATAS.		Tom	
Database	Update	9972	Script is needed which is to be run when Site Security is enabled and records in SITESEC are found, because now it is not possible to enable site security on restored database.		Donatas	
Database	Update	10112	Change LSTDEF.TABLENAME type to varchar(128). Change LSTDEF.TABLEALIAS type to varchar(128).		Rimas	
Database	Update	10356	RealLegal Authentication Service 1.0 Requirement for SP1		Tom	
Database	Update	10357	RealLegal Authentication Service 1.0 Requirement for SP1		Tom	
Database	Update	10365	Functional Security - Assign Functions UI Update - Database changes		Tom	
Database	Update	11968	Add timestamp on MATSEC table, when record is being added into this table (NTFS integration requirement)		Darius K	
Database	Update	13966	I had problems using IDGEN through RDS, because RDS default handler is able to marshal only single Recordset. I solved the problem by modifying IDGEN procedure this way		Vitalius	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Desktop Views	Feature	14741	Add the ability to include an ActiveX or Web browser form on the desktop views		TF	
Desktop Views	Info	13727	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").		Ligita	
Desktop Views	Update	10588	Desktop views - Workflow. See comments.		Vaidas	
Document Assembly	Bug	12343	Merge with Word2000. When multiple documents are opened and generate one more document (use doc assembly template), then this just generated document does not come to the front. I have to click on it on the title bar.		Rasa	
Document Assembly	Bug	13228	Access Violations reported by Kelly&Ferraro. See comments for details	Kelly & Ferraro	Ken; Mike G	22922
Document Assembly	Bug	13946	In PM, create document profile, create document. Edit it save, then exit. Here WP exits but it also shuts PM down instantly.	Dalan & Katz - 031.Ticket 25405	Ken F; Mike G	25405
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"	AmFam	Mike G, Ken F	Feedback
Document Assembly	Bug	14495	Receiving message"The server threw an exception" when creating and changing documents	Bacon & Wilson	Mike G	Feedback
Document Assembly	Bug	14751	In WP8, you have your pm document that has an address field pulled in, this field is not pulling in for some doc comps. Go to Format, envelope and the address field will pull in to the WP envelope but only if it is a basic	Dalan & Katz	Jason	25416
Document Assembly	Bug	14822	Document Save Error. When creating a Template/Boilerplate combination and then trying to save we get an error starting "Subscript out of range."	Wards	Donatas	
Document Assembly	Bug	14867	Receive Message "DELETE statement conflicted with COLUMN REFERENCE constraint 'ASM_UPDATELOG_COMPONENTID_REF'. The conflict occurred in database 'PMWinDB', table 'ASM_UPDATELOG', column 'COMPONENTID'"	AmFam	Hauf, Barb K	Feedback

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document Assembly	Update	6569	Enable support for Textbridge 2000.		Ricky	
Document Assembly	Update	12259	Replace existing HDExec function call to HotDocs with the Assemble Template call		Tom	
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		TF	
Document Assembly	Update	14467	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		TF	
Document Assembly Merge	Bug	13561	When merge document get an error 'Could not find WLL window to communicate with Ms Word'		Rasa	
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?		Rasa	
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.		Rasa	
Document Assembly Merge	Bug	14232	Problem when try to copy HotDocs component.		Rasa	
Document Assembly Merge	Bug	14310	When generate some documents with doc assm templates, get access violation.		Rasa	
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)		Rasa	
Document Assembly Settings	Feature	12711	In Document Assembly Settings, rename "Options" to "General", and move to be in the first position.		Tom	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
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		Abe	
Document Assembly Settings	Update	11581	Add a Change Set column to the component listing, to show what the last Change Set was that was applied.		Tom	
Document DE	Bug	10318	Create new Profile Only document, enter required fields and hit Groupware button, have got an error 'Invalid variant type conversion'. For the saved Profile Only document Groupware button is disabled (also is disabled groupware right click menu item)		Rasa	
Document DE	Bug	11704	Create new Profile Only document > click Groupware button in Profile window > get an error: "Invalid variant type conversion".			
Document DE	Bug	13386	When using Pmpaper.exe a 40 or 50mb file will cause the app to stop running	Stephanie J. Stevenson, P.C.	Josh	24333
Document DE	Bug	13454	Error 'The server threw an exception.' in Document DE			
Document DE	Bug	13455	Error when creating document	Bacon & Wilson - 0201	Steve Adams	23422
Document DE	Bug	13795	Problem when create document and select Profile Only template.		Rasa	
Document DE	Bug	14111	Fix IDocProfile interface EditDocument implementation so it would not through an exception to the callee, if Doc Profile ID is not valid, and would behave gracefully as the rest of the DE forms do		DK	
Document DE	Bug	14442	Error message "External exception C0000006" when clicked on Caption button in Document DE	AmFam	Mike G; Ken F	Feedback
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	AmFam	Krebs-Otto, Rita J	Feedback

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
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 entering a hearing	AmFam	Mike G	Feedback
Document DE	Bug	14649	Receiving Message "Warning, YOUR connection to the database dropped" when Trying to generate a document	AmFam	Mike G	Feedback
Document DE	Bug	14681	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Document DE	Bug	14727	Regional Options are not respected in following places.		Neringa	
Document DE	Bug	14832	Timeout expired error when savin Document Profile	AmFam	Ginder, Carolyn S	Feedback
Document DE	Bug	14869	Access violation at address 0066EA44 in module 'PMWIN.exe'. Read of address 00000008	AmFam	Corrigan, William J	Feedback
Document DE	Update	14061	IDocProfile.EditDocument OLE method: if invoked with non-existing doc profile ID, fails to close form correctly and throws exception to the callee. Must be fixed		DK	
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.	Summer S	Mike G	
Document Listing	Bug	14679	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Document Settings	Feature	12710	In Document Settings, rename "Options" to "General", and move to be in the first position. Move all document-specific system settings to that tab.		Tom	
Document Settings	Bug	13688	Tab order is incorrect in Document Template DE		DK	
Document Settings	Bug	14736	Receive Message "Warning, YOUR connection to the database dropped" when in document settings trying to set up a new form	AmFam	Mike G	Feedback
Document Template	Bug	12221	If in the PM80 document template was checked 'Skip Document Assembly', after upgrade, the radio buttons of document assignments are enable.		Rasa	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Documentation/M anuals/Help	Bug	14789	There was an error on the start.htm page in the utilities\ subfolder for PMTemplate.exe		TF	
Documentation/M anuals/Help	Bug	14799	Correct the restore instructions for MSWDAFIX.EXE		Tom	
Documentation/M anuals/Help	Update	9842	Update TO with the following "OCX files are registered by installs/upgrades. If user does not use installs/upgrades, they have to register those components by hand".		Ken; Daiva	
Documentation/M anuals/Help	Update	10417	Update Beta and GA Network Install and Upgrade Splash Screen, Readme Files, Start pages and License files for SP1.		Tom	
Documentation/M anuals/Help	Update	10418	Update Beta and GA Client Install and Upgrade Splash Screen, Readme Files, Start pages and License files for SP1.		Tom	
Documentation/M anuals/Help	Update	10419	Update Beta and GA PMRemote Install and Upgrade Splash Screen, Readme Files, Start pages and License files for SP1.		Tom	
Documentation/M anuals/Help	Update	14481	Update readme.txt with info regarding <PMROOT>\KOFAX_INS directory - see 14410		Donatas	
Documentation/M anuals/Help	Update	14482	Update TO with info regarding <PMROOT>\KOFAX_INS directory - see 14410		Donatas	
Documentation/M anuals/Help	Update	14582	Create install and upgrade files for Pumasillo, as well as update the release notes		TF	
Entity Assign	Bug	12101	Role Details filed accepts more than database allows (Matter->Entity Assign Wizard->Additional Information tab). I can enter as many characters as I want, but RoleDetails field has 150 ch limit (Assign table).		Mike G	
Entity Assign	Update	4730	Matter DE: Overview: Billings: Report/Bill to tab. Press new > Assign Wizard window appears. There is only "New" button in this window. There should also be "Select" and "Close" buttons.		Arunas	
Entity DE	Bug	10954	Do not allow enter lines, containing only spaces, into address (like now empty line in address is discarded)		Donatas	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Entity DE	Bug	11950	creating new organization entity cannot get focus on a field after the message, that such company already exists		Sigita	
Entity DE	Bug	12224	Site Security is on. Open entity which has selected Parent Organization and is from another site. Go to General:Addresses tab, check/uncheck 'View Parent Organization Addresses', hit Close. Entity is not Closed. It is closed just from Other Details tab.		Rasa	
Entity DE	Bug	13313	Access violations reported by Wilkes&McHugh	Wilkes & McHugh - 0244	Ken; Mike G	23208
Entity DE	Bug	13666	When open Issue DE from Entity Related Tree, "Specific to this matter" checkbox should be disabled or invisible		Donatas	
Entity DE	Bug	14300	Access Violation when checking on an entity for a phone number.	Bacon&Wilson	Alice D. Delorme	Feedback
Entity DE	Bug	14328	Error "Invalid column name 'MEDCAREPRID'" when cancelling the "adding" of an entity (adding a party)		McRae Huszagh	Feedback
Entity DE	Bug	14450	Receiving "Warning, YOUR connection to the database dropped" Message ,when GOING FROM GENERAL TAB TO OTHER DETAILS IN AN ENTITY.	AmFam	Mike G, Ken F	Feedback
Entity DE	Bug	14503	Receiving message "A component named frmEntityInfo already exists" when trying to look at an address of an already assigned entity	AmFam	Mike G	Feedback
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#	AmFam	Swenson, Angela J	Feedback
Entity DE	Bug	14530	Access Violation when attempting to open an entity to make modifications	AmFam	Conover, Sarah J	Feedback
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	Wilkes & McHugh	Mike G	Feedback
Entity DE	Bug	14540	Receiving "Access violation at address 007ED65E in module 'PMWIN.exe'. Write of address 000000E0" when Opening Address on Entity	AmFam	Mike G	Feedback

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Entity DE	Bug	14550	Receiving Message "A component named frmEntityInfo already exists" when in entities	Wilkes & McHugh	Mike G	Feedback
Entity DE	Bug	14604	Receive "Access violation at address 007ED65E in module 'PMWIN.exe" error.	AmFam	Mike G	Feedback
Entity DE	Bug	14675	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Entity DE	Feature	11343	Add "Address" label below Description (Entity entry, Primary Address tab).		Mike G	
Entity DE	Update	10352	RealLegal Authentication Service 1.0 Requirement for SP1		Tom	
Entity DE	Update	11010	View menu changes		Donatas	
Entity DE	Update	11238	"Side" drop-down list should be named "Firm Side" (Entity screen, General tab)		Mike G	
Entity DE	Update	11413	PCA 3.1 Requirements for Chimborazo: Entities - New option group Select Timeslip Rates Based on		Donatas	
Entity DE	Update	12891	Whenever you change the Prefix or the Last Name, repopulate the Salutation field, even if it is not null		Tom	
Entity DE	Update	13226	Do we need the same functionality for Billable as we have with client with respect to "Client Requires Number"?	AmFam	Tom	26357
Entity Listing	Bug	10394	Create new User with different Home and Default Sites, go to Entity listing (any of them) - user's Security Level column is empty. If edit user and change it's sites to same, Security Level is shown in listing.		Donatas	
Entity Listing	Bug	10790	Error message when deleting entity.		Vaidas	
Entity Listing	Bug	10955	If entity has got all three lines in it's address, and City, in entity Preview Address field focus is set on last line - thus first line is not visible in preview.		Donatas	
Entity Listing	Bug	11665	Some of Entity Auxiliaries does not fit into Entity listing Preview panel		Donatas	
Entity Listing	Bug	12598	Clicking Clear filter and query should clear filter and display all entity types.		Mike G	
Entity Listing	Bug	14602	Receive Message "Warning, YOUR connection to the database dropped" when going to Edit Preferences from Related Tree of Entity	AmFam	Mike G	Feedback

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Entity Listing	Bug	14673	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Entity Listing	Bug	14819	Multiple records in listing when filtering by Issue		Vitalius	
Entity Listing	Update	11287	Entity Record Comments Screen should be renamed to "Comments" to be consistent with the preview pane view AND to avoid confusion with Notes button.	Lewis Kinard	Lewis; Mike G	
Entity Listing	Update	11321	Update Entity Listing Quick Filter to be consistent with other Quick Filters.		Tom	
Entity Listing	Update	12770	Publish the auto-refresh method for the Global Entity listing		Tom	
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)	Shriners	Mike G	
Entity Merge	Bug	11679	Problems after Entity Merge. Create an entity 1, fill all the required fields. Create entity 2, fill all the required fields. Create entity 3, fill all the required fields.		Arunas	
Entity Merge	Bug	14713	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Entity Settings	Bug	14446	Receive "Warning, YOUR connection to the database dropped" message, when working in the Entities settings.	AmFam	Mike G; Ken F	Feedback
Entity Settings	Bug	14677	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Entity Settings	Feature	12709	In Entity Settings, add new "General" tab in the first position and move all entity-specific system settings to that tab		Tom	
Entity Settings	Update	11239	Remove tabs highlighting (When hovered over, Entity settings screen)		Mike G	
Entity Settings	Update	12918	Tabs within Entity Settings should be in this order (related to 12709 - rename as needed):		Tom	
Entity: Tree View	Bug	14657	Error message displays on sending a mail from Groupware.		Neringa	

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Filter	Bug	13754	Remove mask from Entity Filter All Phone#s field. Add support of wildcards		Mike G	
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		Mike G	
Filter	Update	11329	Update "ALL" functionality on listing.		Vaidas	
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		TF	
Groupware DE	Bug	14454	Receiving "Warning, YOUR connection to the database dropped" message, when in creating a new task in Groupware.	AmFam	Mike G, Ken F	Feedback
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	AmFam	Mike G	Feedback
Groupware DE	Bug	14546	Receiving Message "Description>Cannot resolve recipient - To" when sending an appointment through Groupware	Fuller, Johnson & Farrell	Mike G	Feedback
Groupware DE	Bug	14606	Receive "Warning, YOUR connection to the database dropped" when Trying to send a note by e-mail	AmFam	Mike G	Feedback
Groupware DE	Bug	14645	Error message "Exception occurred: External exception C0000006" when drag incoming mail into a matter	AmFam	Long, Gwendoly n K	Feedback
Groupware DE	Bug	14800	An unknown error occurred	Glasser	Richard Serpe	Feedback;26 418
Groupware DE	Bug	14803	Cannot get message ID from Microsoft Outlook	AmFam	Zacharczyk, Arthur G	Feedback
Groupware DE	Update	13964	Sending Groupware from Note DE does not supports System Setting "Use ClientNumber.MatterNumber" in Subject		Donatas	

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Groupware Listing	Bug	11367	Bad message when deleting Groupware item.		Vaidas	
Groupware Listing	Bug	14573	Receive Message "Warning, YOUR connection to the database dropped" when Checking email coming in - recorded statement from WDM word processing	AmFam	Mike G	Feedback
Groupware Listing	Bug	14697	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Groupware Settings	Feature	12713	In Groupware Settings, rename "Options" to "General", and move to be in the first position.		Tom	
Groupware Settings	Bug	14699	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Guideline	Update	10012	OCA Watch requirement for PMWin:		Darius K	
Guideline	Update	10017	PCA 3.0 requirement for PMWIN:		Darius K	
Guideline	Update	10353	RealLegal Authentication Service 1.0 Requirement for SP1		Tom	
Guideline	Update	10875	Practice Manager > Administration > System Settings > Adapters > Configure. When attempting to open FTS from configure button in PM, user gets "Cannot configure from the workstation" error.		Aurelija; Gedas	
Guideline	Update	13126	Update product copyright information to 'RealLegal, LLC. 1992-2003. All rights reserved'		Tom	
Guideline	Info	14010	WindowsXP with SP1. When opening a file from another computer (PMWin.exe for example) User will be presented with a warning screen.			
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		TF	
Help	Update	14764	Update feedback module		TF	
Imageview	Bug	10658	Problem with Image- and Tiff- viewers. See comments		Vaidas	
Imageview	Bug	13545	Out of memory error using TextBridge OCR:	Amfam	Ken	

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Imageview	Bug	13829	In Window menu displayed not all of document's pages and order of pages is incorrect.		Rasa	
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.		Audrius	
Imageview	Bug	14516	When close ImageViewer window, have got an error.		Rasa	
Imageview	Update	10444	Update/recompile Image Viewer to support data structure changes in SP1. This should be implemented at end of Beta.		Daiva	
Imageview	Update	10445	Update/recompile Tiff Viewer to support data structure changes in SP1. This should be implemented at end of Beta.		Daiva	
Install/ Upgrade	Bug	10757	When installing PM Server, there are grammar errors in Authentication information required for external WEB users window.		Arunas	
Install/ Upgrade	Bug	10772	When upgrading pm server, go until "Enter the MS SQL Server administrator name and password for RLEnterprise database" window, click Back > you are in the next window instead of previous one.		Arunas	
Install/ Upgrade	Bug	10831	When installing PM Client, I see the installs copying something into MDAC26tmp folder. But current PM should be related only with MDAC 2.7		Arunas	
Install/ Upgrade	Bug	10914	Run PM Upgrade program > choose Repair. The repair option does not upgrade (if necessary) database.		Arunas	
Install/ Upgrade	Bug	10944	Errors during install - see comments PMWin database was on server DONATAS, RLENTERPRISE was on LTDEVSQL2		Donatas	
Install/ Upgrade	Bug	10964	When Workstation upgrade can not find workstation installed, it displays message with spelling error.		Donatas	
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.		Ken	
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		Gedas	

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Install/ Upgrade	Bug	14085	Running client install on the Citrix server MPCTX-01 crashed the OS		Gedas	
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).		Arunas	
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.		Arunas	
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.		Arunas	
Install/ Upgrade	Bug	14866	Spelling Error in error message on installing pmwin 8.7SP2a client.		Mike G	
Install/ Upgrade	Info	12805	Upgrading to this release of Practice Manager requires the existing installation of Practice Manager already be successfully upgraded to Practice Manager 8.7, as that is the only upgrade path we will be supporting going forward		Tom	
Install/ Upgrade	Info	14044	This release of Practice Manager only supports upgrades from v87 or higher		TF	
Install/ Upgrade	Update	10359	RealLegal Authentication Service 1.0 Requirement for SP1		Tom	
Install/ Upgrade	Update	10360	RealLegal Authentication Service 1.0 Requirement for SP1		Tom	
Install/ Upgrade	Update	10362	Integration Engine Install/Upgrade Requirements for SP1 - Network Installation.		Tom	
Install/ Upgrade	Update	10363	Integration Engine Install/Upgrade Requirements for SP1 - Client Installation.		Tom	
Install/ Upgrade	Update	10380	Reporting Requirements for PM 8.7 SP1		Tom	
Install/ Upgrade	Update	10408	The RealLegal.CAAPICORE.dll must be installed into \$Program Files\Common Files\RealLegal and registered on the Workstation Install.		Lee	
Install/ Upgrade	Update	10409	The \$System32\RealLegal.DataService.Udl must be created by the Workstation installation; it specifies the location of the RLENTERPRISE database.		Lee	

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Install/ Upgrade	Update	10634	When ESD components are installed (during PM server installation), an empty row appears in add/remove programs panel. This happens on Windows NT and 98 (98 SE).		Arunas	
Install/ Upgrade	Update	10642	Install PM 8.5 network server. Go to Control Panel > Add/Remove programs > there is a record about it: Practice Manager 8.1. OK. Run upgrade to upgrade PM to the latest version.		Arunas	
Install/ Upgrade	Update	10682	If I delete PMWIN.exe file and then run network server upgrade > choose Repair option > upgrade program does not add new PMWIN.exe file into <PMROOT> directory. I suppose Repair should do it.		Arunas	
Install/ Upgrade	Update	14583	Update the installs and upgrade programs with files from PCR 14582		TF	
Install/ Upgrade	Update	14584	Update the install programs for GA release with the PUMASILLO program file set (see 14582)		TF	
Install/ Upgrade	Update	14585	Update the upgrade programs for GA release with the PUMASILLO program file set		TF	
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		TF	
Issue Settings	Bug	14707	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Legal Vision Integration	Bug	8348	Edit button is not disabled in matter Rates field.		Dalia	
Legal Vision Integration	Bug	9508	When clicking "Yes" without a Transaction Code, you receive the message "Transaction posted successfully to Legal Vision". There is no option to not use transaction codes in Timeslip settings, just sub transaction codes.	0208;	Carole Redoble	0208-2379
Legal Vision Integration	Bug	9799	Timekeeper is not posted to Legal Vision.		Dalia	
Legal Vision Integration	Bug	9800	Need a new message, if timekeeper is not posted to legal vision.		Dalia	

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Legal Vision Integration	Bug	11130	Matter Synchronization from Legal Vision To PM is not working		Dalia	
Legal Vision Integration	Bug	11220	Changes to lawyer entities does not pass for existing matter		Dalia	
Legal Vision Integration	Bug	11221	Change the lawyer in the matter and do not do any changes in General tab> this matter DE. Hit on button 'Save' in this Matter DE >General tab.. Message about matter posting to LV does not appear.		Dalia	
Legal Vision Integration	Bug	11276	Try to open archived timeslip listing, have got an error:'General SQL error. The column prefix 'TIMESLIP' does not match with a table name or alias name used in the query.'		Dalia	
Legal Vision Integration	Bug	11277	Create a new matter. Matter is succesfully posted to Legal Vision. In Information screen hit on button 'Matter rates'.There are no items in Matter rates screen, but button 'Edit' is not disabled.		Dalia	
Legal Vision Integration	Bug	11278	IF Is not checked on any checkbox in Synchronization screen> General tab>Timeslip Listing, Synchronize button must be disabled.		Dalia	
Legal Vision Integration	Bug	11279	When clicking "Yes" without a Transaction Code, you receive the message "Transaction posted successfullly to Legal Vision". There are no options, to not use transaction codes in Timeslip settings, just sub transaction codes.		Dalia	
Legal Vision Integration	Bug	11280	In Timeslip listing>Profile tab hit on 'A/R Inquiry' button. Maximize A/R Inquiry screen- screen is maximized not correctly		Dalia	
Legal Vision Integration	Bug	11283	Entering bad user name or password into Login to LV screen.		Dalia	
Legal Vision Integration	Bug	11284	Entering bad user name or password into Login to LV screen.		Dalia	
Legal Vision Integration	Bug	11286	If user will edit timekeeper match field after creating a new timekeeper, this change will be not posted to LV. If user will try to edit that match field we must add a message that after edditng this change will be not to LV.		Dalia	

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Legal Vision Integration	Bug	11290	Entering bad user name or password into Login to LV screen.		Dalia	
Legal Vision Integration	Bug	12587	LV rates where not populated in timeslip DE.		Dalia	
Legal Vision Integration	Bug	12626	Use new pmwindb. Open synchronization screen. Check on all checkboxes and try to synchronize. Have got an error: string or binary data would be truncated. Not all timekeepers are synchronized from LV to PM.		Dalia	
Legal Vision Integration	Bug	12762	Activity codes tab is empty. Synchronize activities from LV to PM. Appears not all activities in PM. Do not changes and synchronize another time- now all activity codes synchronized from LV to PM.		Dalia	
Legal Vision Integration	Bug	12791	Load PMWIN. Open Timeslip listing. Login to LV. Assign all timeslip listings columns. Now filter timeslip listing by timekeeper and matter (to see LV timeslips). Apply filter. Have got ADO error:		Dalia	
Legal Vision Integration	Bug	12798	During synchronization process button 'Synchronize' must be disabled. (In Timeslip settings>general tab)		Dalia	
Legal Vision Integration	Bug	12800	There is no possibility to search by any column in matter rates screen.		Dalia	
Legal Vision Integration	Bug	13223	Change date/Time format in System settings : use date separator -. Now go to matter rates tab>Change rate> item disappears from Matter rates listing. Must reopen matter rates screen, if want to see matter rates item.		Dalia	
Legal Vision Integration	Update	8217	In User Preferences>General tab >Matter Information Screen Active tab check on Timeslip checkbox. In Timeslip Settings>general tab select billing program 'Legal Vision'. Try to open standart or specific matter- have got an error ' Invalid class string'.		Dalia	
Legal Vision Integration	Update	8346	In Timeslip settings >General tab select Billing Program Legal vision and select timeslip Export directory. Open timeslip listing. Using right click hit on 'Export'.Nothing happens.		Dalia	
Legal Vision Integration	Update	11531	Review the codes, and come up with a way to match existing codes in PM to codes in LegalVision (see comments)		Tom	

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Legal Vision Integration	Update	12761	Update message 'Cannot Post Timekeeper to Legal Vision. Reason: Timekeeper record does not exist. Do you want to create new timekeeper in Legal Vision'.		Dalia	
Litigation Specific Settings	Bug	14721	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Login	Bug	3281	I have added support for two new parameters "/srv=" and "/db=" as well as two new functions ParamExists and GetParam. /srv and /db allows you to overwrite default server and database name specified in the alias.		David Cox	
Login	Bug	10619	Changing active site when record is editited. See Comments		Vaidas	
Login	Update	10354	RealLegal Authentication Service 1.0 Requirement for SP1		Tom	
Login	Update	11469	Implement changes discussed during the Authentication Meeting. Implement full login authentication using the authentication API; requires SOAP to be installed and for the WSDL to be populated in the registry.		TF	
Login	Update	11470	Implement changes discussed during the Authentication Meeting. Remove RLENT synchronization from the functional security dialogs. Only synchronize the creation, edit, and deletion of users.		TF	
Login	Update	14078	Take login code from PMWin and make it to be a separate object		DK	
Login	Update	14079	Update security COM object to retrieve functional securities using a ticket		Vitalius	
Mail Merge	Bug	14715	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Matter DE	Bug	8722	Citrix enviroment (login like a simple user) - Intake_default.ocx and Matter_default.ocx. I create a law type with intake_default.ocx and matter_default.ocx. After using Intake Wizard I try to create matter with this law type, have got		Rasa	
Matter DE	Bug	10534	Error message "The column prefix 'LWAS' does not match with a table name or alias name used in the query."		Vaidas	

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Matter DE	Bug	11139	When you attempt to create a Timkeeper-Matter Rate within a Matter, the Matter is not pre-selected. Therefore you must select the matter each time you create a rate.		Mike G	
Matter DE	Bug	11226	Change Error message "You must enter a Matter Name before you continue" to "You must enter a Search Name before you continue" (when creating new Matter and not entering Search name)		Mike G	
Matter DE	Bug	11429	Tab order is not correct in PCA intake wizard screen and in pca matter screen.		Dalia	
Matter DE	Bug	11433	If focus is left on Parent Matter field in Matter DE form have an error : 'Underfined parent matter'.		Dalia	
Matter DE	Bug	11803	Matter -> Annotations tab -> clicking on Filter button brings up "Annotation Filter" screen, which looks like Query screen. Clicking on Query button brings up the same screen		Mike G	
Matter DE	Bug	14548	Receiving Message "Warning, YOUR connection to the database dropped" when Trying to assign entity in matter	AmFam	Mike G	Feedback
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.	AmFam	Mike G	Feedbak
Matter DE	Bug	14663	Regional Options are not respected in following places.		Neringa	
Matter DE	Bug	14669	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Matter DE	Bug	14874	Warning, YOUR connection to the database dropped	AmFam	Vandevoo rde, Lisa A	Feedback
Matter DE	Update	11806	Matter DE -> Issues tab -> Created At column should be renamed to Date Created. Same on the Available Issues Screen		Mike G	
Matter Listing	Bug	10538	Error message "Access violation at address 779D92CB in module 'oleout32.dll'. Read of address 87BD9D49."		Vaidas	

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Matter Listing	Bug	10828	Problem with query. See comments.		Vaidas	
Matter Listing	Bug	11578	Problem with query. See Comments		Vaidas	
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.	Glasser and Glasser	Mike G	Feedback
Matter Listing	Bug	14528	Not all matter-related items, mentioned in the message, appering after choosing some matter for deletion, are deleted.		Sigita	
Matter Listing	Bug	14542	Receiving Message "Warning, YOUR connection to the database dropped" when Going into preferences from Matter listings	AmFam	Mike G	Feedback
Matter Listing	Bug	14575	Receive Message "Warning, YOUR connection to the database dropped" when Looking up claims numbers under "matter name"	AmFam	Mike G	Feedback
Matter Listing	Bug	14667	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Matter Listing	Update	11233	Add checkbox called "Other" next to "Open" and "Closed" (Matter Listing)		Mike G	
Matter Settings	Bug	14671	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Matter Settings	Update	10372	PCA 3.0 Requirement for SP1 - Implementing PCA Matter screen as a standard Matter in Practice Manager.		Tom	
Matter Settings	Feature	12708	In Matter Settings, add new "General" tab in the first position and move all matter-specific system settings to that tab.		Tom	
Matter:Annotations	Update	14560	Add auto-refresh to the Matter-Annotation listing to respect the System Setting		TF	
Matter:Auxiliary	Update	11945	scoll bars are needed to auxiliary screen		Sigita	
Matter:Defendant	Bug	14725	Regional Options are not respected in following places.		Neringa	

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Matter:Documents	Bug	14497	Receiving message "Exception occurred" every time I create a new document, in all matters	Bacon & Wilson	Mike G	Feedback
Matter:Documents	Bug	14873	Timeout expired	AmFam	Kessler, Brian R	Feedback
Matter:Entities	Update	11588	In System settings check 'Disable Entity Assignment Wizard'. When assign all available entities to the matter and this matter already has the entity assigned with selected role, no message is displayed.		Rasa	
Matter:Entities	Update	11622	Relationship Properties screen - Define relationship field allows only two lines of text. It should allow more		Mike G	
Matter:Entities	Update	11911	New/Updated Securities for Matter-Entity Assignments		Tom	
Matter:Overview	Bug	14685	Regional Options are not respected in following places.		Neringa	
Matter:Plaintiff	Bug	14688	Regional Options are not respected in following places.		Neringa	
Matter:Timeslip	Bug	11888	You could login to Juris, when enter incorrect UserID or incorrect Password.		Rasa	
Matter:Timeslip	Bug	14665	Regional Options are not respected in following places.		Neringa	
Matter:Tree View	Update	13776	Cannot view type from within timeslips when selected as a viewable column.	NFI Industries 0262	Ken	25144
Matter:Workflow	Feature	14871	When user opens workflow item, which belongs to some plan, open that plan in separate window without opening Matter DE, like in 8.0		Tom	
Matter:Workflow	Update	10295	Workflow plans display all the branches after upgrade from 8.0 to 8.7.24 - not only for selected Answers		Richard; Donatas	
Menu Engine	Update	10271	Menu Engine update.		Darius K	
Note DE	Bug	11669	Spell check notes on save setting is not working correctly		Dalia	
Note DE	Bug	11672	User cannot get message 'The Note is not assigned to any matters. Are you sure you want to save this note?' if is viewing note without assigned matter or close note from ex. Entities tab.		Dalia	

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Note DE	Bug	11681	Open Note DE>Related annotation tab. Search it by any column. Select another annotation using index lookup- search screen is still active. The same is in annotation listing		Dalia	
Note DE	Bug	11684	Open Note listing> Phone call DE>Details tab> Entity listing. Create a new phone call. Hit on 'Timeslips' in Phone DE>Details tab. Phone call de is closing and timeslips is opening under entity listing and another phone call screens.		Dalia	
Note DE	Bug	11686	Open Phone call de> Relate to matters, Relate to entities or Relate to issues tab. Search by any column in Available items and Assigned items screens. Go to other tab. Search screen is still active.		Dalia	
Note DE	Bug	13806	In Note DE have got an error 'Cannot focus a disabled or invisible window Select Text'.		Rasa	
Note DE	Bug	14579	Receiving Message "Warning, YOUR connection to the database dropped" when Attempting to enter new Note	AmFam	Mike G	Feedback
Note DE	Bug	14693	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Note Listing	Bug	14691	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Note Listing	Update	11636	Note listing-filter title bar should display Note Filter, not Notebook filter		Mike G	
Note Listing	Update	11637	Note listing-Filter screen has checkbox called Preview; it should be called Preview Item, as right -click menu option		Mike G	
Note Listing	Update	11890	Add multi-select to the Note listing and update listing functionality to support it		Tom	
Note Listing	Update	12229	If user does not have permission to create phone calls, hide the New Phone Call button		Tom	
Note Listing	Update	12772	Publish the auto-refresh method for the Global Note listing		Tom	
Note Listing	Update	14002	Add Other Party, Other Party's Phone Number and Message text as available columns in the Notes Global listing	Wilkes & McHugh	Cynthia K; Mike G	24503

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Note Settings	Bug	14444	Receive "Warning, YOUR connection to the database dropped" message, when clicking on the administration menu – Notes	AmFam	Mike G, Ken F	Feedback
Note Settings	Bug	14695	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Note Settings	Feature	12715	In Note Settings, add new "General" tab in the first position and move the Phone Call Settings field to that tab		Tom	
Note Settings	Update	12923	Tabs in Note Settings should be in this order (related to 12715 - rename as needed):		Tom	
Phone Call DE	Bug	12240	Open existing Phone Call, do not change anything, press Close - message 'Save Changes?' is displayed.		Tom	
Phone Call Settings	Bug	14709	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Printing	Bug	12813	Entity Listing, select Print to Printer, in Report Settings screen Customize tab assign all available Field. Hit Preview. Nothing. Reports Preview screen is not opened.		Rasa	
Printing	Bug	14318	Clicking Cancel on the Print dialog box doesn't cancel printing.		Mike G	
Printing	Update	14469	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		TF	
Publish Points	Bug	10895	OCA Watch must be installed. Go to Matter Workflow listing, right click mouse > select OCA Watch - Firm Docket Calendar > OCA Watch web page opens (this is OK) and new separate Workflow listing window appears (This is a bug).		Edmundas; Arunas	
Publish Points	Update	9790	Portal Requirements for SP1 - Remove Publish from the right-click menus added in 6990, 6992, 6995, 7000, 7003, 7006, and 7009. This will now be handled by the Portal Integration.		Tom	
Publish Points	Update	9791	Portal Requirements for SP1 - Remove the Publish button from the toolbar added in 7013. This will now be handled by the Portal Integration when that functionality.		Tom	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Publish Points	Update	10553	Implement a Publish Point for the Workflow Plan tab popup menu.		Rimas; Edmundas	
Publish Points	Update	11346	Publish Points update.		Darius K	
Remote	Update	10827	Update Remote to match database changes.		Arunas	
Security Settings	Bug	10392	Error in message, when changing Site security from None to Exclusionary (previous is Inclusionary)		Donatas	
Security Settings	Bug	10901	Error message "Error occurred synchronizing entity to RealLegal Authentication Service. Error: Cannot insert the value NULL into column 'SOURCE_ID', table 'RLENTERPRISE_demo.dbo.DATASVC_ASSIGNMENT'; column does not allow nulls. INSERT fails.		Vaidas	
Security Settings	Update	10366	Functional Security - Assign Functions UI Update - Changes in "Functional Security -> Assign Functions" screen.		Tom	
Security Settings	Update	10367	Functional Security - Assign Functions UI Update - Functionality in "Functional Security -> Assign Functions" screen.		Tom	
Security Settings	Update	10771	Functional Security - Assign Functions tab. There is no possibility to filter security by Description any more - it is very inconvenient.		Daiva	
Security Settings	Update	10845	Functional security > Assign functions. See comments		Vaidas	
Security Settings	Update	11912	Add respecting of Site Security to entity-specific and matter-specific entity relationships		Tom	
Security Settings	Update	14202	For firms upgrading from PM86 SP2 or earlier, automatically assign securities created in PM87 using the agreed upon auto-assign rules		TF	
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		TF	
Site Settings	Bug	12620	Fix tab order and columns on Drive Mappings DE form		Tom	
Site Settings	Update	10369	GMT/UTC Preparation Requirements for SP1 - GMT/UTC Site Settings.		Tom	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Site Settings	Update	13762	Modify the Drive Mapping DE form		TF	
Source Code	Bug	14586	Respect the Regional Options in timeslips and timeslip reports (same as PM80)		TF	
Source Code	Bug	14817	Access violation at address 0046A257 in module 'PMWIN.exe'. Read of address 00000208	AmFam	Ingersoll, Andrea L	Feedback
Source Code	Feature	14024	Add Publish Points to support Lotus Notes Integration		TF	
Source Code	Update	10351	RealLegal Authentication Service 1.0 Requirement for SP1.		Tom	
Source Code	Update	10355	RealLegal Authentication Service 1.0 Requirement for SP1		Tom	
Source Code	Update	10361	RealLegal Authentication Service 1.0 Requirement for SP1		Tom	
Source Code	Update	10383	OCA Watch Requirements for PM 8.7 SP1.		Tom	
Source Code	Update	11197	ISecurity interface and function AccessAllowed publishing.		Darius K; Tom	
Source Code	Update	11198	TGridColors making a components.		Darius K; Tom	
Source Code	Update	11199	DelTable making a separate COM object (module dll) which can be used with or without PMWIN.		Darius K; Tom	
Source Code	Update	11201	Timeslip Settings (General Tab) + TimeSlips.GetRate publishing.		Darius K; Tom	
Source Code	Update	11988	Fire set of PPs when entity was un-assigned from matter (NTFS integration requirement)		Darius K	
System Settings	Bug	14711	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
System Settings	Info	8241	In System Settings >General tab try to open Pmwin folder- have got an error:'I/O error 123'.		Dalia	
System Settings	Update	9792	Portal Requirements for SP1.		Tom	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
System Settings	Update	10368	GMT/UTC Preparation Requirements for SP1 - GMT/UTC System Settings.		Tom	
System Settings	Update	10374	PCA 3.0 Requirement for SP1 - Implementing PCA Admin Setting Menu as a Standard Administration Menu Item in Practice Manager.		Tom	
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.		Audrius	
TiffView	Bug	14508	When close TiffViewer window, have got an error.		Rasa	
TiffView	Bug	14639	In Window menu displayed not all of document's pages and order of pages is incorrect.		Rasa	
TiffView	Bug	14729	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Timeslip DE	Bug	10001	Problems with login to different sites		Dalia	
Timeslip DE	Bug	14452	Receive "Warning, YOUR connection to the database dropped" message, when creating timeslip	AmFam	Mike G; Ken F	Feedback
Timeslip DE	Bug	14661	Regional Options are not respected in following places.		Neringa	
Timeslip DE	Bug	14718	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Timeslip DE	Bug	14865	When an edit to the timeslips Status field is made, the "Rate" field is changed automatically and without warning or ability to avoid.		Lewis Kinard	
Timeslip DE	Update	10939	Update billing export module accordingly		Donatas	
Timeslip DE	Update	11416	PCA 3.1 Requirements for Chimborazo: Timeslips - Launch Timeslip Review on Timeslip Save.			
Timeslip DE	Update	11417	PCA 3.1 Requirements for Chimborazo: Timeslips - Modify rate selection algorithm			
Timeslip Listing	Bug	10661	Export Timeslips appears on Right-click menu even when it is not supposed to.		Ken	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Timeslip Listing	Bug	10921	PMBILL_EXPORT module needs to be called with Application ID as parameter, not parent application id.		Darius K	
Timeslip Listing	Bug	11657	Billing program is ex. QuickBooks 4.0. Open Timeslip listing. All timeslip already exported. Try to export. Timeslips details were exported, but only after got a message : No timeslips selected for export.		Dalia	
Timeslip Listing	Bug	14013	Got an access violation error after archiving the timeslips.		Sigita	
Timeslip Listing	Bug	14653	Regional Options are not respected in following places.		Neringa	
Timeslip Listing	Bug	14683	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Timeslip Listing	Update	11323	Update Timeslip Listing Quick Filter to be consistent with other Quick Filters.		Tom	
Timeslip Listing	Update	11420	PCA 3.1 Requirements for Chimborazo: Timeslips - Modify Total button in Timeslip Listing to include logic for Adjusted Totals			
Timeslip Listing	Update	11889	Add multi-select to the Timeslip Listing and update listing functionality to support it.		Tom	
Timeslip Settings	Bug	12014	Problems with Timeslip Settings -> General -> Enable/Disable archiving		Sigita	
Timeslip Settings	Bug	14687	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Timeslip Settings	Feature	12712	In Timeslip Settings, move "General" to be in the first position		Tom	
Timeslip Settings	Update	10379	PCA 3.0 Requirement for SP1 - Additional Rate Types.		Tom	
User Preferences	Feature	14745	Add the ability to enable, select and position the ActiveX or Web browser form on the desktop views		TF	
Utility	Bug	14429	PMTemplate convert utility problem with Corel8.	Bowers Harrison	Rasa	23879
Utility	Update	11361	Add functionality to conversion utility, implemented in PCR 9941.		Tom; Darius K	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Workflow DE	Bug	11261	Clicking on minimize button on Instructions for user screen should not minimize whole PM window (Matter->Overview tab->Critical Date screen-> Instructions for user)		Mike G	
Workflow DE	Bug	13239	Workflow Administrators no longer have the ability to create templates(actions) on the fly when creating plans.			
Workflow DE	Bug	13765	There is no way to get out of plan.		Ligita	
Workflow DE	Bug	13798	PMWin Not responding when negative number is selected in Workflow Activities Schedule.		Ligita	
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 activity. Add Entity DE Entity name faucet filter and OK button are disabled.		Ligita	
Workflow DE	Bug	14125	Need to fix IWorkflow.NewItem interface implementation. It should not throw an error 'List index out of bounds(-1) if WF template ID is invalid		DK	
Workflow DE	Bug	14250	Access violation, when entering a task into PM	Wilkes & McHugh	PSTANLEY	Feedback
Workflow DE	Bug	14597	On Reschedule Event screen, "By" faucet filter doesn't have right-click option Filter Field.		Mike G	
Workflow DE	Bug	14651	There are several problems with copying Judge Address to the Location field in Court Event		Mike G	
Workflow DE	Bug	14703	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Workflow DE	Bug	14815	Access violation at address 00454E8A in module 'PMWIN.exe'. Write of address 0195C858	Wilkes & Mchugh	Carol Buckingham	Feedback
Workflow DE	Bug	14826	Tasks scheduled for a weekend when they are not	Wards	Donatas	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Workflow DE	Feature	14647	Add the ability to suppress the Status Change dialog box. This is both a System Setting and User Preference		TF	
Workflow DE	Update	14831	Review functionality of In Progress 100%.		TF	
Workflow Listing	Bug	12066	Change 'Time TO' to 'Time To'		Sigita	
Workflow Listing	Bug	14388	If you remove Matter No column from the listing and save Grid layout, after closing and reopening PM column still displayed.		Mike G	
Workflow Listing	Bug	14701	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Workflow Listing	Bug	14759	Error message "QueryRule: Field 'MATPLANID' not found" when marking appointment Held		Lewis Kinard	
Workflow Listing	Bug	14837	Receiving "Warning, YOUR connection to the database dropped" message	Wilkes & McHugh	Kim Mitchell	Feedback
Workflow Listing	Update	13742	Multiselect>change status not always working		Ken	
Workflow Listing Hot Filter	Update	11476	Update the Workflow Listing Filter		Tom	
Workflow Settings	Feature	12714	In Workflow Settings, add new "General" tab in the first position and move all workflow-specific system settings to that tab		Tom	
Workflow Settings	Bug	14705	User should not be able to minimize Modal dialog. The list of modal screens attached.		Rasa	
Workflow Settings	Bug	14868	Spelling error on confirmation message in Workflow Settings:Activity Type tab		Mike G	

7. Scope – Inclusions – Duplicates

This report is taken from the PCR Database. It is all PCRs in Pumasillo that, as of March 21, had a status of On Hold, Under Review Pending, Done or Final, that are duplicates of work carried out in PM87, PM87 SP1, PM87 SP2, and PM87 SP2A that occurred after the Chimborazo

code split in August of 2002. This is a fixed list of replicated PCRs, and is not subject to updating. As of this date, all these PCRs have been Done and are awaiting final testing from QA.

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

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Components	Bug	14199	Use "No." consistently throughout PM (right now we have "#" and "Number").		Mike G	
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.		Mike G; Ken F	
Components	Feature	3125	Write new TPrintQuery component descendent from TQuery with overridden methods for Calculated fields adding by using our TFilterQueryPM component.			
Components	Update	8248	All PM lookups- When activated-a blank box appears in the system taskbar.		Ken	
Components	Update	13748	With WinXP, there is a problem with minimize, restore windows.	Patten	Ken	
Database	Bug	10918	RLEnterprise integration with PM: There are not refreshed assignments when changing entity role.		Vitalius	
Database	Bug	10947	RealLegal.DataService.udl storing the SA login pass on every Client machine open the udl in Notepad I can see the SA password.		Ken	
Database	Update	12082	up86to87.sql prints 'Upver script finished.' before it really is. See comments		Ken	
Desktop Views	Bug	13669	Spelling error: message reads "Please go to Edit – Preferences – Views, and selected". Should be "select"		Mike Girenko	
Document Assembly	Bug	12376	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		Rasa	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document Assembly	Bug	12522	When you create a document using a template (Template A) (Word XP template) and leave it open in Word. Then, if you create another document using Template A, if you do not actually close the first document, you will get an error.		Richard; Mike G	
Document Assembly Settings	Bug	14148	Document Component Design screen: with Win XP theme and 800x600 resolution, Aux label gets cut off (see screenshots)		Mike G	
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		Mike G	
Document Assembly Settings	Bug	14152	Date Formatter screen (Document Assembly Settings: Option tab)-spelling error "Description and EXMPLE". Should be "Example"		Mike G	
Document DE	Bug	12602	Create new document profile. Enter Description, Primary Matter (use '_rm matter'), Author and hit Tree button. Wait for a few seconds. Pmwin crash. Tested on Glasser872 db.		Rasa	
Document DE	Bug	13782	Open document profile. Click on List Versions button, click on Delete button (it is enabled), have got message 'Cannot delete the latest document version' (that's ok). Then double click on item, now Delete button is disabled.		Rasa	
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?		Rasa	
Document DE	Feature	14566	Add Check out/in functionality to documents.		TF	
Document DE	Update	14096	Entities Tab in document profile and assignments. See comments		Ken	25741
Document Listing	Bug	10297	When drive mapping is not setuped, when opening files from another site PM in some cases does not give message "Drive mapping does not exists.." but tries to open document in local drive according to original document path.		Daiva	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document Listing	Bug	12098	When I created profile (using template) and saved it, after I tried to open this profile(double-click), I get ".file is not found. The document may not have been created.. "message. I can open this profile if I right-click on it and choose "view profile"		Mike G	
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.		Rasa	
Document Listing	Bug	13788	The messages when file is not founded:		Rasa	
Document Settings	Feature	11241	"File Extention" field should be autopopulated, after user entered "Application Name" (Document Settings->Application tab->New Application Screen)		Mike G	
Documentation/M anuals/Help	Update	13997	Update PMRemote manual		Aurelija	
Encryption	Update	9087	Implement new encryption in each of our applications.		Ricky	
Entity Assign	Update	12150	When assigning an entity to a matter, only show roles for which the entity is not assigned to the matter.		Tom	
Entity DE	Bug	10753	It is possible to create an entity as Both a USER and WEBONLY. Web Only should not allow the selection of USER and Vice Versa		Ken	
Entity DE	Bug	11903	Wrong message form when assigning duplicated entity in Entity de :Tree		Vaidas	
Entity DE	Bug	12308	When the upgrade scripts were run (upgrade from 8.0.78 to 8.7.31), address descriptions were removed from the addresses. Every time a user goes into an entity record, they are required to enter an address description.	Shriners - 0209	Tom	23115
Entity DE	Bug	13810	New DE forms created from Entity Related Tree view are opened behind the Entity DE window.		Ligita	
Entity DE	Bug	13812	When clicked Copy on Assign/Copy Parent Address screen the same address copied twice to the child entity		Mike G	
Entity DE	Bug	13819	Hourly Billing Rate screen-OK and Cancel buttons get cut off, when Display Properties:Theme set to WinXP (800x600 resolution)		Mike G	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Entity DE	Update	11227	The Entity Title pull down list (Prefix) should be filtered by the Entity Gender choice (Entity's General tab)	Lewis Kinard	Lewis; Mike G	
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.		Arunas	
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.		Arunas	
Entity Settings	Bug	14438	Role Assignment Filter – "Side" checkboxes do not respect Law Type or Role settings		Mike G	
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		Donatas	
Form Designer	Bug	14748	For Designer screens and Minimize buttons.		Rasa	
General	Bug	14146	Record ID should be added to the following listing as available column (see comments)		Mike G, Ken F	
Groupware DE	Bug	9914	Groupware by using Groupwise. Creating a Phone message.		Daiva	
Groupware DE	Bug	9917	GW6: trying to drag e-mail which is attached to another e-mail, in "Choose Matter to Import Groupware Item to" screen click Close, get error: 'GroupWise Error - Token failed execution! ItemListCreateFromControl'		Donatas	
Groupware DE	Bug	14235	Message displayed when user does not has access to his e-mail folders is not entirely correct.		Donatas	
Groupware DE	Feature	8594	I want to file our request for having an option in groupware that allows either "File No." or "Matter No." to be auto-generated in the message/task subject line.	AMFAM - 0100		
Groupware Listing Query	Update	13277	In Groupware Listing Query some of query fields are in all capital letters: BEGINTIME, CLIENTNUMBER, ENDTIME, MATTERNUMBER.		Ligita	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Guideline	Bug	14390	Review ability to check/uncheck "Public Template" checkbox on templates within Admin settings		Mike G	
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.		Rasa	
Imageview	Bug	14114	Run ImageViewer without Pmwin. Enter Login name which not exist, hit OK, have got 'Invalid object names 'Entities'.		Rasa	
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.		Rasa	
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.		Rasa	
Imageview	Bug	14133	Run ImageViewer without Pmwin. Incorrect tab order in Login screen. Should be 1-Login, 2-Password, 3-OK, 4-Cancel.		Rasa	
Imageview	Bug	14135	Run ImageViewer without PM (go to <root>\ImgView\ and double click on imgv32.exe). ImageViewer connecting to default database of SQL Server user. Maybe Viewer should be taken the connection from pmwin.udf?		Rasa	
Imageview	Bug	14155	OCR from Image Viewer:		Rasa	
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" '.		Rasa	
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'.		Rasa	
Imageview	Update	9856	I open the same TIF file by using Tiff Viewer and Image Viewer. Tiff Viewer shows that my file contains 13 pages, Image Viewer - only 5.		Daiva	
Install/ Upgrade	Bug	14072	Review PM uninstall/install. Seems like it doesn't remove/update all files.		Mike G	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Install/ Upgrade	Bug	14073	Review PM uninstall/install. Seems like it doesn't remove/update all files.		Mike G	
Install/ Upgrade	Update	10991	Include execution of utility developed for PCR 9305 in a standard upgrade.		Tom	
Legal Vision Integration	Bug	8293	In 8.0 create a client.This client posted to Legal vision. After in 8.6> Timeslip settings> general tab>Synchronize data sets synchronize clients - this just created client in 8.6 will be like organization, not like individual.		Dalia	
Legal Vision Integration	Bug	8347	In Timeslip listing you will not see all timeslips with deleted task code. Must synchronize this deleted task code from Legal vision if you want to see all timeslips.		Dalia	
Legal Vision Integration	Bug	8360	In Timeslip listing>Profile tab hit on 'A/R Inquiry' button. Maximize A/R Inquiry screen- screen is maximized not correctly.		Dalia	
Legal Vision Integration	Bug	8361	In Timeslip listing using right click hit on 'In last days>Other. In Enter data screen enter value 1000. Hit on 'Ok' button. Have got an error:'Non-nullable column be updated to NULL'.		Dalia	
Legal Vision Integration	Bug	11225	Timeslip entry is not working from PM to LV. Automation error appears. Also automation error appears if try to enter bad user name or password in Login to LV screen.		Dalia	
Legal Vision Integration	Bug	11282	In any listing hit on 'Retrieve Filter or query' using right click. If Filter list screen is empty try to enter any record in Search field>Filter List screen. Have got access viaolition error.		Dalia	
Legal Vision Integration	Bug	11285	Synchronization from PM to LV if Timekeeper match field is 'ID'.		Dalia	
Legal Vision Integration	Bug	11288	Timekeeper match field is 'Timekeeper number'.		Dalia	
Legal Vision Integration	Bug	11289	Entering bad user name or password into Login to LV screen.		Dalia	
Legal Vision Integration	Bug	11291	Matter Synchronization from Legal Vision To PM is not working		Dalia	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Legal Vision Integration	Bug	11530	Unassign timekeepers in PM is not unassigning timekeepers in LegalVision			
Legal Vision Integration	Bug	12748	LV rates are populated in timeslip DE, but in timeslip appears rate if last rate was entered ex. in 2001/10/12 and user create timeslip ex. 2002/10/12. In This situation rate must be 0. (the same in 8.0)		Dalia	
Legal Vision Integration	Update	11837	Add support for LegalVision 11		Tom	
Mail Merge	Bug	9916	In document assembling generate mailing label (not envelope) template (use MS Word2000 or Word97). After merge five or more entities with this template. When view 'Print Preview' in word, the information of each entity is placed not in individual page .		Rasa	
Mail Merge	Bug	13815	Mail listing screen opens with scroll bars		Mike G	
Mail Merge	Bug	13817	Tools: Mailing Lists: Assign Lists or Assign Entities tabs-column headings should be loaded, when you open this listings first time		Mike Girenko	
Mail Merge	Update	11478	W97convert.exe utility does not convert Address templates to Word 2000 or Word XP.		Daiva	
Matter DE	Bug	10759	Can't open security tab.		Vaidas	
Matter DE	Bug	10816	Error message: Failed to load PCA_MATTERINFO.OCX		Vaidas	
Matter DE	Bug	11223	Cannot see all PCA matter fields in PCA matter DE> general tab, if PC resolution is 800 x 600		Dalia	
Matter DE	Feature	13971	Increase size of Matter Search Name to 100 characters	Shriners 0209	Cynthia K; Mike G	
Matter Listing	Update	11234	Change "Age" label to "Matter Age" label (Matter Listing Overview tab)		Mike G	
Matter Listing	Update	11334	Change the caption on the matter screen for the Open & Closed check box from Status to Category.	Wilkes & McHugh - 0244	Cynthia K	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Matter:Issues	Bug	14437	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.		Rasa, Ken F	
Matter:Issues	Update	13667	Review the matter-specific issue functionality		Donatas	
Matter:Workflow	Bug	13408	Access violation reported by Ward Haddaway	Ward Hadaway - 0250	Donatas	22207
Note Listing	Bug	10833	Note info never is empty		Vaidas	
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		Mike G	
Printing	Bug	14655	Access violation when "printing"	Bacon&Wilson	Karen L. Kennedy	Feedback
Printing	Bug	14656	Access violation when "printing"	Bacon&Wilson	Karen L. Kennedy	Feedback
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		Mike G	
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" error.		Mike G	
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.		Arunas	
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	LSNT	Josh Berlin	24325
System Settings	Update	13472	Add new Preference: Open Document <input type="radio"/> Maximized <input type="radio"/> Normal		Tom	
System Settings	Update	13473	Add new Preference: Open Document <input type="radio"/> Maximized <input type="radio"/> Normal		Tom	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
TiffView	Bug	14121	Run TiffViewer without Pmwin. Enter Login name which not exist, hit OK, have got 'Invalid object names 'Entities''.		Rasa	
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.		Rasa	
TiffView	Bug	14129	Run TiffViewer without Pmwin. Enter Login\Password, hit OK, have got 'No such interface supported'. After that TiffViewer runs.		Rasa	
TiffView	Bug	14131	Run TiffViewer without Pmwin. Incorrect tab order in Login screen. Should be 1-Login, 2-Password, 3-OK, 4-Cancel.		Rasa	
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?		Rasa	
TiffView	Bug	14224	Open document with TifViewer. Go To File menu and select Close Image. Document is closed. Then hit on Next/Previous Page button. Have got 'Login failed for user' '.		Rasa	
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'.		Rasa	
Timeslip Listing	Bug	11127	When you export timeslips and mark them exported, the screen does not auto-refresh after the export is completed.		Mike G	
Utility	Bug	12261	On Glasser db, pmtemplate will not work. Version - 8.7.31 (latest macros and template from release site)	Glasser & Glasser - 0185	Tom	
Workflow DE	Bug	11274	By changing plan's matter it is possible to insert plan into matter, to which law type plan was not assigned		Donatas	
Workflow DE	Update	11813	Workflow Listing -> New Task -> Entities tab -> Address and Entity Note areas should not be resizable. Right now user can resize it horizontally, like regular column		Mike G	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Workflow Settings	Bug	14321	Activity Type drop down list has a spelling error.		Mike G	
Workflow Settings	Bug	14456	Workflow Settings: Activity Templates tab-Type column should be renamed to Category		Mike G	

8. Scope – Exclusions

This report is taken from the PCR Database. It is all PCRs in Pumasillo that, as of March 21, had a status of 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 Area, then Type and then 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.

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Auxiliary Settings	Bug	12251	Right click on auxiliary is not working for any EXE specific auxiliary "specifically entity".	Glasser & Glasser - 0185	Ricky	
Components	Bug	11314	In some filter selection screens, when type search by any character, search window is blinking.		Rasa	
Components	Bug	13391	Memory leak in TDBGridPM.MouseDown method		Arturas	
Components	Bug	13513	Tested on Glasser87 db on LTDEVSQL2. Open any record containing date field (date format on Glasser87 is YYYY-MM-DD) > enter eg. 2005-01-01 > try to save a record or to go to other field > get an error:"2005--" is not a valid date."		Arunas	
Components	Bug	13614	Calendar week view have not released all resources		Saulius	
Components	Update	11099	Remove hardcoded Limit of 20 item seletion in Filter selection screens.		Ken	
Components	Update	11820	Implement separate command line switch for PMWIN COM Object registration		Darius K	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Components	Update	13290	From components TFilterLookupButtonPM and TCalendarButtonPM destructor remove DeleteObject(Glyph.Handle).		Arturas; Saulius	
Components	Update	13324	Bad exception handling in TADOQueryPM.Post method. There was ability to produce Acces Violation		Saulius	
Components	Update	13377	TTreeViewPM componet has a memory leak: it does not free items when beeing destroyed		Arturas	
Database	Bug	9973	Restored 8.0 database does not has Site Security enabled - after upgrade to 8.7 records are creted in SITESEC table assigning each user to their default site. As a result it is not possible to enable Site security in upgraded database.		Donatas	
Database	Bug	10801	Upgrade problem.		Saulius	
Database	Bug	10908	Review All 8.0 sql scripts for compliance. upg_prep80 upver038.sql is not SQL2000 compliant because quoted identifiers is on by default. See comments.		Ken	
Database	Bug	10953	Add to upgrade script a script to trim spaces out of addresses		Ken; Donatas	
Database	Bug	11007	Add these changes to SQL scripts		Donatas	
Database	Bug	11171	Add Client Phone to ListingID=3		Tom	
Database	Bug	11511	Remove available fields from LSTDEF that cause records to appear more than once		Tom	
Database	Bug	12013	Error occurs in up87sp1 stored procedure PM_Compact_Addresses if address line has apostrophe symbol in it. CREATE PROCEDURE [dbo].[PM_Compact_Addresses]		Robertas	
Database	Bug	12249	Seems like we are experiencing deadlocks	Glasser & Glasser - 0185	Ricky	23070
Database	Info	13781	Sign in as SA, open up a users entity record. The users code greyed out and cannot be changed	0257 Legal Aid Bureau, Inc	Jason	24200

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Database	Update	10810	Rebuild the Upgrade program with updated scripts by Saulius (PCR 10801).		Tom	
Database	Update	10812	Write an upgrade utility, related to 10801.		Tom	
Database	Update	11178	Increase length of the CMPNFLDS STOREPREFIX to VARCHAR(50) in order to prepare for longer.		Darius K	
Database	Update	11671	When upgrading, include populate the Event/Due Date with the completion date for any completed workflow items where the Event/Due Date is null		Tom	
Database	Update	12006	Update indexes on MRULASS table		Darius K	
Database	Update	12073	Create and index on MRULASS.ADMINID		Darius K	
Database	Update	12297	Add a clustered index on mrulent that includes entityid and threadid in that order.		Ricky	
Desktop Views	Bug	10493	In User Preferences is checked Default PM Desctop =Two Party, open Desctop, hit on 'Calendar for' faucet filter and extract available list, after hit on the any link (when the list is still extracted), have got access violation.		Rasa	
Desktop Views	Bug	10548	Access violation When open Workflow Item.		Vaidas	
Desktop Views	Bug	10551	In User Preferences is checked Default PM Desctop =Two Party, open Desktop:		Rasa	
Desktop Views	Bug	12535	Enable Desktop View -> User Preferences -> choose default PM View - PM Desktop -> disable Desktop View - it still launches.		Sigita	
Desktop Views	Bug	12537	Got an error while launching pmwin and then it closes.		Sigita	
Desktop Views	Bug	12596	User has not 'Open Desktop View - Manager', 'Open Desktop View - Single User', 'Open Desktop View - Two-Party' functional securities. Go to User Preferences> Views tab Desktop options are enable.		Rasa	
Desktop Views	Update	11998	Update Desktop Views to respect System Setting for Ticklers (implemented in 11841)		Donatas	
Desktop Views	Update	12295	Change Desktop Views into a firm-wide option		Tom	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document Assembly	Bug	10592	Site Security is on. Create doc assm template with some Entity Type or Entity Role Auxiliaries fields. Generate document with this template		Rasa	
Document Assembly	Bug	10956	Spaces in address lines are treated as valid for doc assembly. I'm pretty certain that this was not the case in prior versions and needs to be changed back.		Donatas	
Document Assembly	Bug	11012	Document Assembly Merge -- Progress indicator reads "Processing Mail Merge" from Generate Doc. It should read "Merging Document" as a nice, generic label.		Donatas	
Document Assembly	Bug	11014	Document Assembly Merge -- Upon completion of merge with Corel WP2002, a dialog appears that reads "MacroFilePlay." It does not appear to impact the merge, but it is annoying.		Tom	
Document Assembly	Bug	11602	From Word97 can not to invoke a window that lists PM fields, when is installed HotDocs application.		Rasa	
Document Assembly	Bug	11604	OLE merge with MS Word97. OleMerge macro isn't autoruning.		Rasa; Daiva	
Document Assembly	Bug	11618	Document Assembly - Options. When is checked 'Include Entity Role' in Signature Block, Pleading Signature Block or COS Blocks and String, role is not retrieved in generated document.		Rasa	
Document Assembly	Bug	12135	Upgrade issue with Document Templates		Tom	
Document Assembly	Bug	12177	Document creation and opening of Word XP	Patten - 0206	Ken; Mike G	22940
Document Assembly	Bug	12301	On Glasser db, when generate document with some doc assembly templates, the info is not retrieved in some fields (Use components 'F-Bidding Instruction Fax from Client for Bid Only' or 'F-Fax to client contact re backuptcy info')		Rasa	
Document Assembly	Bug	12441	When doing document merge, if user chooses to skip component during merge, Merging process loops.		Darius K	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document Assembly	Bug	12450	Boilerplates are a <<Doc1.doc>> ctually showing as assigned templates in this situation. There are no templates with this naming convention	Shriners - 0209	Ken	
Document Assembly	Bug	12460	If any kind of error is thrown during document assembly that prevents the merge, close opened Word windows		Tom	
Document Assembly	Bug	12524	Existing OLE queries lose field type in conversion from 8.0 to 8.7	Patten - 0206	Ken	
Document Assembly	Bug	12540	Get error when trying to use OLE merge with Word	Patten - 0206	Ken	
Document Assembly	Bug	12554	When merge document and use doc assembly component with _NoteDesc and _NoteText fields, the same info retrieved in both fields (that is a description of the note retrieved in both fields)		Rasa	
Document Assembly	Bug	12579	I have doc assm component with all note fields for all groups. Merge document with this template. Select multiple addressee entities. The fields CC_NoteDesc, BCC_NoteDesc... for the first addressee entity retrieves correct, but for the second - incorrect		Rasa	
Document Assembly	Bug	12581	Word displays 'File in Use' message when one user has opened component in Design mode, and other is trying to merge a document using same component		Tom	
Document Assembly	Bug	12585	I have doc assembly template with all note fields (_NoteDesc, _NoteText) from all groups. Generate document with this template. All selected entities have at least two notes. There are not invoked Note screens of BCC, Plaintiff, Entity Type groups in the		Rasa	
Document Assembly	Bug	12901	Keyboard prompt hides behind the word window when performing document merge	Shriners - 0209	Ken	
Document Assembly	Bug	13436	Access volation got when cancel document profile while generating document.		Ligita	
Document Assembly	Bug	13517	Error when assigning entities in Addressee/CC/BCC Pick Screen		Aurelija	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document Assembly	Bug	13556	During merging a document, while gauge is processing, click on any button or tab. Have got AV		Aurelija	
Document Assembly	Bug	14278	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	AmFam	TF	
Document Assembly	Bug	14280	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	AmFam	TF	
Document Assembly	Info	10993	CMPNASSN.ISDEFAULT field got a value of 'T' on all the records but document profile forces the user to pick components anyway. Only post-upgrade combination assignments behave in document profile.	0031; 0033;	Donatas	0031-2552
Document Assembly	Info	12558	Nestform Command forces the merge code to wrap to the next line. It seems to be putting a hard return in to the code. When the nestform command wraps it will not merge in the desired component	Patten - 0206	Mike G	
Document Assembly	Info	14343	When making a copy of a document the Document Profile screen will sometime have buttons grayed out.	Bacon & Wilson	Mike G	25997
Document Assembly	Info	14578	Receive Message "Word cannot open this document template" when trying to open fax template in forms.	AmFam	Mike G	Feedback
Document Assembly	Update	11360	Update existing macros that are being attached with newly created template, so that window that lists fields during design time would at least have scrollbars.		Tom	
Document Assembly	Update	11389	Update component conversion replacement change sets for PCR [11381/11382].		Tom	
Document Assembly	Update	11391	Update component conversion utility for PCR [11381/11382].		Tom	
Document Assembly	Update	11398	Update component conversion replacement change sets for PCR [11379/11380].		Tom	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document Assembly	Update	11400	Update component conversion utility for PCR [11379/11380].		Tom	
Document Assembly	Update	12305	Write a conversion script that populates the ASMENGINEID with the ID of the current selected Default Engine when ASMENGINEID=<null> or ASMENGINEID=0. This basically puts the database in a state where the condition corrected in 12302 can no longer exist		Tom	
Document Assembly	Update	12994	Remove the copy of the components AFTER the merge has been successfully completed		Tom	
Document Assembly	Update	13241	All property fields for the blank components should be null		Tom	
Document Assembly Design	Bug	11182	Change component name creation so that it would correspond warning that is being displayed when there is Entity Type or Role selected which exceeds 25 characters.		Darius K	
Document Assembly Design	Bug	12385	After upgrade from SQL7 to SQL2000 Database Command for pulling information from EXE Auxiliaries is not working	Glasser & Glasser - 0185	Cynthia K	
Document Assembly Design	Info	11584	Copying of some old FRM file contents to old document assembly template, may cause problems for template conversion utility.		Daiva	
Document Assembly Design	Update	10932	Create utility for converting field names in document assembly components using macros from 8218.		Donatas	
Document Assembly Design	Update	11180	Change Document Assembly Component Design screen functionality so that when Entity Type or Entity Role group fields are being assigned to component field name would include Entity Type or Role ID in it.		Darius K	
Document Assembly Design	Update	11327	When generate doc assembling component, in word processor 'PM Document Assembly Component...' screen need to add Horizontal Scrollbars, because not all field description is visible.		Rasa	
Document Assembly Design	Update	11380	Implement new FieldKeys from pm8725.fields.rev1.xls.		Tom	

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Document Assembly Design	Update	11382	Implement new construction method for ET and ER prefixes.		Tom	
Document Assembly Design	Update	11450	When creating prefix for an Entity Type or Entity Role with long description, show warning message		Tom	
Document Assembly Design	Update	11633	From PCR 11379: the following fields left with original names: LastReview, LastUpdate, MatterType, ParentOrg.		Daiva	
Document Assembly Design	Update	12303	Remove Default as an option for Engine on the Design screen, and only list the actually word processors that can be used -- it should default to the current selected Default Engine		Tom	
Document Assembly Design	Update	12434	When a user changes the Default Word Processor for Assembling on the Document Assembly Settings - Options tab, AND the change was to another version with the same word processor "family" (e.g., Word or WordPerfect) handle the functionality as follows		Tom	
Document Assembly Merge	Bug	10173	Document merge - Adressee/CC/BCC Pick screen. Assign all columns to Entities grid, make active Role column and type search, have got 'Incorrect syntax near the keyword 'ORDER''		Rasa	
Document Assembly Merge	Bug	11697	When I do OLE merge with Corel 8, get error from "WPWin Error" - Unsupported file format detected. But document is merged ok.		Daiva	
Document Assembly Merge	Bug	12247	Some auxiliary fields are not merging in the foreclosure department	Glasser & Glasser - 0185	Ricky	
Document Assembly Merge	Bug	13465	An AV message appeared when I tried to generate a document.		Sigita	
Document Assembly Merge	Bug	13597	Access Violation error when merge a document		Rasa	
Document Assembly Merge	Bug	13606	Got an AV error closing PMWIN.		Sigita	
Document Assembly Merge	Bug	14092	The problem with HotDocs.		Rasa	

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Document Assembly Merge	Bug	14249	The problems with HotDocs.		Rasa	
Document Assembly Merge	Bug	14347	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.		Rasa	
Document Assembly Merge	Bug	14349	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.		Rasa	
Document Assembly Settings	Bug	11483	I open template of "Old All" type, click save - some error message appears, and template is saved of "Address" type.		Daiva	
Document Assembly Settings	Bug	11873	When delete a component from Document Assembly Settings> Components tab, have got an error.		Rasa	
Document Assembly Settings	Bug	12468	When you remove a document type assignment from document settings (DOCTYPAS), you should also remove the document component assignment from that combination (CMPNASSN).		Ricky	
Document Assembly Settings	Bug	12470	Document Assembly Settings : Assignment : Doc Types with No Defaults is not filtering the list properly		Tom	
Document Assembly Settings	Update	10992	Create utility - go through all document assembly components and do a search and replace on field codes, replacing old codes with the new ones. Upgrade both the database AND the files, themselves.		Tom	
Document Assembly Settings	Update	12478	Add script to create defaults in COMPASSN for each DOCTYPAS with an assignment		Tom	
Document DE	Bug	10147	Open document profile, save this profile as template (View> Save as Template), enter Template Code, Description, hit Save Template, nothing happens. Then hit Cancel Template, have got access violation.		Rasa	
Document DE	Bug	10151	In profile only document hit Groupware button - get an error message "Invalid variant type conversion"		Rasa	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document DE	Bug	10179	In Document DE hit Author cowboy hat button. In Entity Listing screen select Matter Client right click menu item (or select Matter Client from View menu), have got an error 'The column prefix 'ASSIGN' does not match with table name or alias name used ...'		Rasa	
Document DE	Bug	10234	An error when split image which is located in another computer.		Rasa	
Document DE	Bug	10236	Drive mappings - copy a document, have got an error '... file is not found. The document may not have been created or may have been deleted.'		Rasa	
Document DE	Bug	10597	When opening a HTML document, get "File not found". Should open the specified link.		Daiva	
Document DE	Bug	11333	When generate document with Tiff Viewer, have got an error 'Invalid column name 'INTEGRATIONID''		Rasa	
Document DE	Bug	11412	When the first time go to document de auxiliary tab, have got an error message, but when the second time go, no message is displayed, just empty tab.		Rasa	
Document DE	Bug	11702	Any fields that are not visible on the profile (eg. Profile only document) should not be populated from the template.		Arunas	
Document DE	Bug	11895	When drag image document with file name having two or more '.' symbols (for ex: 'picture.used.testing.tif), then after clicking Open Document, I get an error 'C:\101\CAT-1\picture.TIF is not recognized' and opens empty Image Viewer screen.		Rasa; Donatas	
Document DE	Bug	12330	Problem with document merging. Create a new document, check 'Assemble Document with Practice Manager' or 'Skip Document Assembly', hit Generate Document. Have got a message. Document is not generated.		Tom	
Document DE	Bug	12414	All of Glasser's document profile templates were changed to "choose fromIndividual components" radio button selected in the 8.7 upgrade. Thecorrect radio button should be "choose from Global assignments"	Glasser & Glasser - 0185	Ken	22297

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document DE	Bug	12416	Two problems: Versions listing does not list the original document, only the new versions and Version numbering is:original: .docversion 1: .a01.docversion 2: .a01.a01.docversion 3: .a01.02.docshould be .a01.doc, .a02.doc, .a03.doc, etc.	Glasser & Glasser - 0185		22927
Document DE	Bug	12611	When copy a document profile which has checked Version Control option, two documents are created x.a01.doc and x.a01.doc. Should be x.doc and x.a01.doc		Darius K	
Document DE	Bug	13294	There is still a problem with copy document functionality when changing matters	0206 Patten	Ken	24671
Document DE	Bug	13367	Error 'The column prefix 'ASSIGN' does not match with a table name or alias name used in the query.' in Document DE Assign Entities screen		Donatas	
Document DE	Bug	13382	Can generate document without Type.		Aurelija	
Document DE	Bug	13452	Access violation reported by Shriner			
Document DE	Bug	13458	Document DE error and Winword error		Donatas	
Document DE	Bug	13498	When try to assign the same entity with different roles to the document, have got an error 'Cannot insert duplicate key row in object 'DOCENT' with unique index 'DOCENT_DEF':'		Rasa	
Document DE	Bug	13567	There is possibility to open multiple instances of the same entity from Document/Entities Tab		Adas	
Document DE	Bug	13569	Opening entity from Document/Entities Tab causes memory leak (EntityParam isn't destroyed)		Adas	
Document DE	Bug	13629	1.Open a new document DE. Go to View> sale as template. Document template is opening.Go another time to view save as template. Can open a lot of new documents templates forms.		Dalia	
Document DE	Bug	13650	Can create document without description.		Rasa	
Document DE	Bug	13721	Document DE Template field does not retrieves components of type 'Document Template'		Abe	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document DE	Bug	13803	Create new Profile, click on Tree button, have got 'Error reading treeAssignment.Anchors: Property does not exist'.		Rasa	
Document DE	Bug	14122	Go to PMWIN document listing > select a document and click Copy > document profile window opens. Fill all the fields with the data related to DOCS Open integration > select Version Control checkbox > click Open Document.		Arunas	
Document DE	Feature	11599	Allow documents to be opened as Read Only		Tom	
Document DE	Feature	12003	Add 'Security button' to Doc Profile window (bellow 'Issues' button) (NTFS integration requirement)		Tom	
Document DE	Info	13282	When drag image document with file name having more than 81 symbols, then after clicking Open Document, I get an error 'C:\101\CAT-1\... is not recognized' and opens empty Image Viewer screen. The same with Tiff Viewer		Rasa	
Document DE	Info	13496	Generating document problem	Seale	Jason	24583
Document DE	Info	13558	In Profile DE, Type field Description is not refreshed when delete Type.		Rasa	
Document DE	Info	13725	Message "Cannot Open File" is displayed when Document Profiel is opened		Abe	139-764
Document DE	Update	12481	PP location change due to PCDOCS		Darius K	
Document DE	Update	13385	Changes in decedit.pas regarding access violations		Erikas	
Document DE	Update	13723	If file is not found, open Document DE as read Only		TF	
Document Listing	Bug	10133	Drive mappings. Tiff and Image viewers do not open document by using mapped drive, if document is created with long file name in PM.		Rasa; Daiva	
Document Listing	Bug	10149	The User does not have drive mapped to source computer. When opening document profile, the Versions, Groupware buttons are disabled. But from document listing is active Version Listing and Groupware right click menu items.		Daiva; Rasa	
Document Listing	Bug	11965	When hit Print Preview in Document listing, nothing happens.		Rasa	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Document Listing	Bug	13232	Access violation error reported by James H. Seale	James H. Seale	Ken; Mike G	23723
Document Listing	Bug	13316	Access violations reported by Wilkes&McHugh	Wilkes & McHugh - 0244	Ken; Mike G	23208
Document Listing	Info	14441	WordPerfect docs are no longer opening using word XP, but only if you try to open them from the listing.	Fuller, Johnson & Farrel	Mike G	25995, Feedback
Document Listing	Update	11893	Update Multiselected documents Delete action		Tom	
Document Listing	Update	13346	Cast filter tree item data to Integer where needed, eg.		Arturas	
Document Settings	Bug	12327	Unable to Open Imageview or Tiffview in Admin>Document settings>Application. Inability to open Non-supported Applications to correct any configuration problems.		Ken	
Document Settings	Bug	12358	Open Word processor that is no longer supported (wp7) You get the message alright. But then an access Violation		Ken	
Document Settings	Bug	12754	Document Settings - Options tab: Document Path problem		Tom	
Document Template	Bug	11695	Open document profile > Main Menu View > Save As Template > template DE window opens. Select Assemble document with Practice Manager radio button > select Choose from Global Assignment > get an error:		Arunas	
Documentation/M anuals/Help	Bug	10430	TO section 4.4. Client Installation Open and run UP001.SQL query. This will populate database with all updates and fixes required for current build.		Donatas	
Documentation/M anuals/Help	Bug	10434	TO section 5.5. Conversion Considerations Prior doing any upgrades please back up you database you will try to upgrade.		Donatas	
Documentation/M anuals/Help	Bug	10439	TO section 5.5. Conversion Considerations should be updated with warning regarding sequence of scripts; also it should say that mentioned scripts are used only for upgrade from 'major' versions, otherwise refer to corresponding upg_prep folder		Donatas	

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Documentation/M anuals/Help	Update	10373	There are some differences with PM 8.0 versions in some documents. See comments.		Arunas	
Documentation/M anuals/Help	Update	10815	Update GA turnover document with the information related to 10801, 10810, 10812.		Tom	
Documentation/M anuals/Help	Update	11331	Update TO: Update MS SQL 7 requerements to be SP4 - version 7.00.1063 //- 7.00.1063 Database Components SP4		Saulius	
Documentation/M anuals/Help	Update	11726	Turnover Document Update		Tom	
Documentation/M anuals/Help	Update	12024	Update turnover - include information that PM client must be installed in order to run Practice Manager.		Ken; Arunas	
Documentation/M anuals/Help	Update	12263	Update TO with following info		Darius K	
Documentation/M anuals/Help	Update	12267	Update TO with following info		Darius K	
Encryption	Update	12299	Move the registration files to a <pmroot>\reg\ subfolder. This way, read/write rights only need to be on that folder and not <pmroot>. Update the Login Code to support this		Tom	
Entity Assign	Bug	11565	Duplicate entity records shown in Entity Assign listing	Wilkes & McHugh - 0244	Donatas	
Entity Assign	Bug	12925	User receives " is not a valid date and time" error, when trying to save entity, which DOB has been deleted.	Bacon & Wilson - 0201	Mike G	23478
Entity Assign	Bug	13441	Assign Wizard does not release used resources (SQLSettings, SoftFilter)		Adas	
Entity Assign	Update	13347	Cast filter tree item data to Integer where needed, eg.		Arturas	
Entity DE	Bug	11713	Entity Tree View filters defaults problem		Tom	
Entity DE	Bug	12128	New Entity - Individual/Client - Other Details - Client Settings does not appear	Patten - 0206	Ken	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Entity DE	Bug	12139	Change Staff Information security should not have an impact on Code field in Other Details tab		Tom	
Entity DE	Bug	12152	Problem with entity info screen opening performance	Glasser & Glasser - 0185	Gedas	
Entity DE	Bug	12322	Problem opening Entity Record from within a matter and from the global listing.: If SSN is null, receive a message that an entity with this SSN already exists and you cannot get to another tab or close the record.	Glasser & Glasser - 0185	Ken	
Entity DE	Bug	12374	It is impossible to create matter-specific relationship to an entity.		Sigita	
Entity DE	Bug	12514	After upgrade from PM80 to PM87341, bar number has no jurisdiction, which was assigned in PM80.		Rasa	
Entity DE	Bug	12600	Speed dial number not displayed, when opening Entity DE		Mike G	
Entity DE	Bug	12960	Open Entity DE, go to Related Tree, uncheck 'Matter Specific' checkbox - get error message:		Mike G	
Entity DE	Bug	13230	Access violations reported by Wilkes&McHugh	Wilkes & McHugh - 0244	Ken; Mike G	23208
Entity DE	Bug	13315	Access violations reported by Wilkes&McHugh	Wilkes & McHugh - 0244	Ken; Mike G	23208
Entity DE	Bug	13320	Access violations reported by Wilkes&McHugh	Wilkes & McHugh - 0244	Ken; Mike G	23208
Entity DE	Bug	13327	Checking for duplicate entity names was incorrect, if individual entity has empty first name		Adas	
Entity DE	Bug	13432	Entity DE, Mailing List - EntParam has not been released		Adas	
Entity DE	Bug	13435	Related Tree - Items have not been released when closing Tree		Adas	
Entity DE	Bug	13437	Related Tree does not release temporary list, used for History View		Adas	
Entity DE	Bug	13438	Related Tree does not release loaded bitmaps		Adas	

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Entity DE	Bug	13439	Related Tree does not release resources, used for opening and creating new notes and timeslips		Adas	
Entity DE	Bug	13462	Open all the listings. Open any matter > go to entities tab > open any assigned entity that has nothing in Address Description field > enter anything in address field (leave Address Description field empty).		Arunas	
Entity DE	Bug	13489	Access Violation when close PM. This happens, when open the same entity de form from different PM places.		Rasa	
Entity DE	Bug	13490	PM screens become mixed.		Rasa	
Entity DE	Bug	13602	It is possible to create entity with only Type assigned		Donatas	
Entity DE	Bug	13624	Create new individual entity > select Entity Type and enter Last Name only (eg.'Test01') > Save. Create one more entity > again select Entity Type and enter Last Name = 'Test01'. The system presents a message that entity 'Test01' already exists > click OK		Arunas	
Entity DE	Bug	13657	Access Violation in Entity DE Related Tree		Donatas	
Entity DE	Bug	13662	In Entities: Related Tree get an error when filtering by Status.		Sigita	
Entity DE	Update	11026	Display a warning from the Entity Role DE and Entity Type DE if the description changes and that Role or Type is used in a Document Assembly Component.		Donatas	
Entity DE	Update	13838	Move the "Require Bar Number" field and button to the General tab and make always visible		TF	
Entity DE	Update	13888	Add new functional security "Allow General Bar Numbers". By default, it should not be assigned to any roles		TF	
Entity Listing	Bug	10135	Create entity auxiliary (in FD) with required fields. Assign this form to entity. Open auxiliary from right click menu, not enter anything and hit Save. Have got warning message (that's ok) and click Cancel button, the auxiliary form not closed.		Rasa	

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Entity Listing	Bug	10187	Entities listing. I filter by multiple matters. If my entity is assigned to 3 matters, it is displayed in the listing 3 times.		Daiva	
Entity Listing	Bug	11517	Prolem with typeseach when creating new entity.		Vaidas	
Entity Listing	Bug	12286	DOD field is not showing up in the Entity list	Glasser & Glasser - 0185		23106
Entity Listing	Update	11861	Update Multiselected entities Delete action like it works in Documents and Workflow listings.		Tom; Arunas	
Entity Listing	Update	13345	Cast filter tree item data to Integer where needed, eg.		Arturas	
Entity Merge	Bug	12550	Create two entities: entity1(fill just last name field) , entity2 (fill all General tab fields, and enter primary address with phones. Merge entities: select target entity1 and source entity2.		Dalia	
Entity Merge	Bug	13404	Tools > Entity Merge opens multiple Entity Merge Utility screens		Rimas	
Entity Merge	Bug	13537	EntityMerge doesn't destroy QueryDelInfo object		Adas	
Entity Settings	Update	11176	Update Entity Type and Entity Role screens in Entity Settings so that when warning is being shown about changed Entity Type or Entity Role description corresponding change set needs to be generated for utility described in #9941.		Darius K	
Entity Settings	Update	12893	Create default Address Description and use to populate Addresses where the Description is null		Tom	
Faxing	Bug	12957	Go to Document listing > select any document > Right click mouse > select Fax. Login to RightFax window appears. In Username field I see "CBoxUserName" value (Password field is empty). Username field should be empty also.	Domengeaux	Arunas	23560
Faxing	Update	12987	RightFax Fax information window > click Add Recipient > Select a recipient window appears. I cannot enter anything in Available Recipients field.		Arunas	
Filter	Bug	11574	In any listing hit on 'Retrieve Filter or Query' screen. Filter by any column by not existing value. Filter listing screen is empty, but buttons 'Change name', 'Apply' or 'Delete' are active.		Dalia	

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Filter	Bug	11629	Error message "Invalid floating point operation" when retrieving filter.		Vaidas	
Filter	Bug	13471	Filter forms do not free internal settings		Arturas	
Filter	Update	11870	Change Filter modules according Arturas suggestions to avoid possible memory leaks. Check TEditLookupGroup objects in Filter units are there all of these freed correctly.		Saulius	
Filter	Update	13329	Update filter tree construction/applying procedures to use Integer datatype instead of TPIInteger datatype for IDs store		Arturas	
General	Bug	13321	Access Violation errors reported by Bacon & Wilson	Bacon & Wilson - 0201	Ken; Mike G	24025
Groupware DE	Bug	10506	E-Mail System = MS Outlook. Drag and drop email with attachment from outlook to PMWIN. After try to edit or view this mail, have got an error 'Invalid variant type conversion.'		Rasa	
Groupware DE	Update	12911	Some times when was opening groupware item(mail engine - Groupwise) message "Update access is denied to current user" popups		Saulius	
Groupware Listing	Bug	11174	Problem when changing columns order.			
Groupware Listing	Update	13349	Cast filter tree item data to Integer where needed, eg.		Arturas	
Groupware Listing Hot Filter	Bug	13448	Groupware hotfilter window not freeing TCommonInLastDays objects		Saulius	
Groupware Template	Bug	10193	Groupware Settings > Groupware Template tab: add column Public to listing, sort by it, type search it by pressing e.g.'s', so that popped combo box would be empty, go to other tab - get access violation		Donatas	
Guideline	Info	12216	Behavior of DE forms when closing		Tom	
Guideline	Update	11356	Printing of individual forms is available except OCX screens.			

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Help	Feature	13700	Add new feedback form to error message and help menu (see the referenced e-mail for details). Related to 13493		TF	
Help	Feature	13701	Addition for the Help Menu	Lewis Kinard	TF	
Help	Info	13703	Help>About>details results in message Your Installation is missing required file(s). Try reinstalling the package	Ice Miller	Ken	
Help	Update	11114	Change the Details window to be a vertically scrolled listing instead of a horizontally scrolled listing		Tom	
Help	Update	13922	Change the default e-mail address (hard coded and in PMFeedback.cfg.xml) for the TO field to "support@reallegal.com"		TF	
Help	Update	14756	Do not start Outlook every time when Feedback form Send button is pressed.		Ken	
Help	Update	14757	I noticed that the feedback form remains open while it is try to open the e-mail message. This actually allows the user to click Send again which causes another e-mail thread to fire and "Choose Profile" gets buried under the second feedback form		TF	
Hot Docs Integration	Bug	12199	HotDocs Freezing	Ward Hadaway - 0250		22945
Imageview	Update	13543	the Image Viewer software does not properly save it's settings.	Amfam	Ken	
Install/ Upgrade	Bug	10109	PM Server install does not find any default path for Practice Manager database location (the path field is blank). MSSQL server type = named instance.		Arunas	
Install/ Upgrade	Bug	10402	When running up86to87.sql or up87_009.sql, some error messages appear.		Arunas	
Install/ Upgrade	Bug	10836	When upgrading PM Server from 8.0.75.1 to 8.7.24.6 using 8.7.24.6A network server upgrade program, answers.ini file is missing in PMROOT directory.		Arunas	
Install/ Upgrade	Bug	11348	Install PM Client on Win98. In autoexec.bat not inserted <PMRoot> path.		Rasa	
Install/ Upgrade	Bug	12030	PMWin installation is incorrectly repaired		Tom	

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Install/ Upgrade	Bug	12123	When installing (or upgrading) MDAC on one workstation, mdac_typ.exe file is deleted in <PMROOT>/Client_ins (or Client_upg - if MDAC was upgraded) directory.	Glasser & Glasser - 0185	Ken; Arunas	23008
Install/ Upgrade	Bug	13659	New Client Install/Upgrade - detect if <pmroot>\pmpurger_ins\PM_Purger_client_v010.exe exists. If yes, include it in the client install/upgrade.		TF	
Install/ Upgrade	Info	14084	Manual install mode is broken		Gedas	
Install/ Upgrade	Update	10270	These files are to be included in the file set. They need to be in the Upgrade CD folder.		Tom	
Install/ Upgrade	Update	11350	Register utility implemented in 9941 in client install according to Airenas comments.		Daiva	
Install/ Upgrade	Update	11822	Update PMWIN client installs to run PMWIN after installation with special command line switch (see 11819)		Darius K	
Install/ Upgrade	Update	12035	Verify that all custom PMWin error messages exist in sysmessages table before performing an upgrade		Tom	
Install/ Upgrade	Update	12428	Updates to the Upgrade Program: Remove the screen that gives the user the option of running the utilities from inside the Upgrade program.		Tom	
Install/ Upgrade	Update	12501	Include MSWDAFIX.EXE, MSWDAFIX.txt and PMTemplate.txt to installs and upgrades		Tom	
Install/ Upgrade	Update	12849	Modify Client Install/Upgrade logic to only use the answers.ini file for the user path OR the selected PM folder		Tom	
Install/ Upgrade	Update	12853	Remove workstation file location from path. The only path needed is the User Path to PM (svUserDir)		Tom	
Install/ Upgrade	Update	13717	Include law_cim.dll in installs		DK	
Install/ Upgrade	Update	13910	Is word 2000 folder really necessary on the release site?		Ken	

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Install/ Upgrade	Update	13962	I install new copy of PMWin on my machine. When I attempt to connect get an error message, attached.		Andrej	
Install/ Upgrade	Update	14411	Include the new TiffView AIPE in the client install		TF	
Install/ Upgrade	Update	14637	Include WFItemsCancelingInClosedMatters.exe utility into installs/ upgrades for 8.7.40.4		TF	
Issue Listing	Bug	13618	When closing Issues listing all opened issues are closed		Adas	
Legal Vision Integration	Bug	11219	Can save the record in Pay to field if using mouse, go to any other field. If user use buttons 'Tab' or 'Enter' message 'RECORD NOT FOUND' appears.		Laura; Dalia	
Legal Vision Integration	Bug	11281	In Legal Vision create an employer and after synchronize it to PmWin- after try to open this entity DE- have got an errors- 'Underfined Security','Cannot focus a disabled or invisible window'.		Dalia	
Legal Vision Integration	Bug	11958	Open Timeslip listing, login to Legal vision. Have got an error: '10/17/2002' if is selected Date/Time formats 'DD/MM/YY' or 'YY/MM/DD' in System settings		Dalia	
Legal Vision Integration	Bug	12588	Replaced 'automation error' with more verbal error message. Also error does not require to restart PM now.		Dalia	
Legal Vision Integration	Bug	12747	Try to create timeslip template. Enter template code and template description. Try to save template. Hit on button 'Save'. Have got an error: FilterQueryMatter: Field 'MATTERNUMBER' not found.		Dalia	
Legal Vision Integration	Bug	12889	Matter Rates Listing -> Enter Rate -> Refresh ->invalid date 'xx/xx/xxxx' . (This error can get is in PC settings date format is ex. dd-mm-yy)		Dalia	
Legal Vision Integration	Info	12649	Cannot post Timeslip to LV- have got automation error (error in LV11). It is working the same as in 8.0 after Vygintas fixes.		Dalia	
Legal Vision Integration	Info	12651	Cannot post matter rates . Error in LV11		Dalia	
Login	Bug	13737	Login screen->change site (Note: missing a "you" in the sentence "Choose an Active Site from the drop-down list. The Active Site is the site you want to work with."		DK	

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Login	Update	10740	PM allows for both NT Authentication and SQL authentication while PM Remote does not. This is a big issue for this client as they only use NT Authentication for security purposes.	AMFAM - 0100	Ken	0100-2529
Login	Update	11885	Update dialog 'Warning, YOUR connection to database dropped' to have Details button. Details button should display more information about occurred exception		Tom	
Mail Merge	Bug	12424	When merge Mail Merge Template and this template has the fields form Entity Type group. Have got the errors 'Merge Error. Possible problem: field ... not found' (DB=Glasser872; Mail Merge Template='_rm_word97_mail merge template')		Rasa	
Mail Merge	Bug	12436	Merge Address Template. There are retrieved some fields with incorrect info. Example: in Addr_BarNumber field retrieved SiteCode, Addr_DOB is empty, in Addr_DOD-> e-mail...		Rasa	
Matter DE	Bug	11728	Try filter entity listing by to roles in Matter DE. Role ComboBox in quick filter is not respected. Also we have two role's fields in Filter DE>Entity listing>Matter DE: combo box and cowboy hat		Dalia	
Matter DE	Bug	11855	Open matter Listing. Create a new matter. Fill general tab, go to entities tab. Leave matter screen opened. Open matter listing using menu icon. Matter listing screen's size is bad.		Dalia	
Matter DE	Bug	13036	A comment in litigation matter disappears.		Sigita	
Matter DE	Bug	13236	Access violations reported by Patten	Patten - 0206	Ken; Mike G	24414
Matter DE	Bug	13255	Access violation reported by Shriner	Shriners - 0209	Ken; Mike G	
Matter DE	Bug	13395	Memory leak in Saga Overview, Plaintiff and Defendant screens. TreeView doesn't free items when security is being applied		Arturas	
Matter DE	Bug	13397	Invoke atached to tabs child forms FormClose method		Saulius	

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Matter DE	Bug	13578	1. Open Matter DE>General tab. 2. Open Matter settings using button near Jurisdiction field. 3. Open New jurisdiction field. 4. Open Entity listing using button near court field. 4. Try create a new entity from Entity listing >View menu.		Dalia	
Matter DE	Info	11854	New matter is not saved.		Dalia	
Matter DE	Update	11709	Add new checkbox 'Matter Client' in Entity DE>Matter DE.		Dalia	
Matter DE	Update	12276	Review logic of hard-coded matter intake sheet		Tom	
Matter Listing	Bug	10174	Error message "The parameter is incorrect"		Vaidas	
Matter Listing	Bug	11562	In Matter listing select multiple matters, go to File, Delete - nothing happens. Implement delete action as it works for Documents and Workflow listings.		Arunas	
Matter Listing	Bug	13317	Access violations reported by Wilkes&McHugh	Wilkes & McHugh - 0244; Shriners - 0209	Ken; Mike G	23208;24483
Matter Listing	Bug	13419	Access Violation in Matter Listing		Vaidas	
Matter Listing	Bug	13443	MatterListing and matter template listing code: In both listings OnQuerySave methods use unassigned variable "lp" that might cause AV		Arturas	
Matter Listing	Bug	13535	MatterFilter doesn't destroy OrgSet, FilterOpened, FilterClosed objects.		Adas	
Matter Listing	Bug	13652	Access Violation errors reported by Bacon & Wilson	Bacon & Wilson	Mike G, Ken F	24025
Matter Listing	Update	13344	Cast filter tree item data to Integer where needed, eg.		Arturas	
Matter Listing	Update	13919	Add Jurisdiction Code as an available column heading to the Matter Listings	AmFam	Cynthia	
Matter:Annotations	Bug	10239	Drive mappings. Can not open image viewer (tiff viewer) from Matter: Annotations tab.		Rasa	

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Matter:Annotations	Bug	10281	If in Index lookup exist two annotations with the same description, annotation listing not refreshed.		Erikas; Rasa	
Matter:Documents	Update	13353	Cast filter tree item data to Integer where needed, eg.		Arturas	
Matter:Entities	Bug	11341	There is the same entity assigned with different roles to the matter in Matter-Entity listing (e.g. with 'Other' and 'Adjuster' roles). For example: 1) open entity with role='Other' and change role to 'Adjuster'. Go to another tab. Have got an error:		Rasa	
Matter:Entities	Bug	11549	In System Settings check 'Disable Entity Assignment Wizard'. When create new entity from matter-entity listing and select Party Type, on Save have got message 'The same Entity cannot be a ... twice in one Matter'.		Rasa	
Matter:Entities	Bug	11878	Entity Role, Role Details, and Matter Side don't respect Site Security of the Matter (other fields do).		Tom	
Matter:Entities	Bug	13314	Access violations reported by Wilkes&McHugh	Wilkes & McHugh - 0244	Ken; Mike G	23208
Matter:Entities	Bug	13450	Access violation got when select entity in Matter:Entity listing.		Rasa	
Matter:Entities	Update	13352	Cast filter tree item data to Integer where needed, eg.		Arturas	
Matter:Groupware	Update	13356	Cast filter tree item data to Integer where needed, eg.		Arturas	
Matter:Issues	Bug	11936	Access Violation when tabbing to issues.Document listing in a Matter Issue DE		Ken	
Matter:Issues	Bug	13616	There is a possibility to open multiple instances of the same Issue from Matter/Issues listing.		Adas	
Matter:Notes	Update	11071	Change Matter Note Listing Hot Filter Type to be look-up on all combinations (change "Type" to be "Notes to Show")		Tom	
Matter:Notes	Update	11073	Change Matter Note Listing Filter "Show Notes For" to be look-up on all combinations (change "Show Notes For" to be "Notes to Show")		Tom; Donatas	

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Matter:Notes	Update	13355	Cast filter tree item data to Integer where needed, eg.		Arturas	
Matter:Overview: Court	Bug	10491	Problems with Role field in Court DE window Judge/Arbitrator Details tab. See comments.		Arunas	
Matter:Plaintiff	Bug	10531	1) International format is checked. Go to Litigation Matter: Plaintiff: Plaintiff tab and select party = person, the SSN field has mask. The same in Litigation Matter: Defendant: Defendant tab.		Rasa	
Matter:Plaintiff	Bug	13715	Incorrect calculations in Special Damages Screen		Abe	
Matter:Plaintiff	Bug	13826	Incorrect calculations in Special Damages Screen		Abe	
Matter:Plaintiff:Medicals	Bug	10157	Create a new record. Remove Provider column from upper listing > hit New in Treatments tab > get an error message: "qMedical: Field 'ENTITYNAME' not found."		Arunas	
Matter:Timeslip	Update	13354	Cast filter tree item data to Integer where needed, eg.		Arturas	
Matter:Tree View	Bug	11720	There is Full Text Search integration installed on computer. When apply filter with text search criterias in tree view, have got an error.		Rasa	
Matter:Tree View	Bug	11960	Cannot see documents in tree view		Vaidas	
Matter:Tree View	Bug	12977	Get an error in Matter:Tree View when Entity:Related Tree is opened.		Mike G	
Matter:Tree View	Bug	13515	Error in matter treeview when filtering by Law Category		Aurelija	
Matter:Tree View	Bug	13637	PM screens become mixed.		Rasa	
Matter:Tree View	Update	11700	Matter DE Tree View filters - updated		Vaidas	
Matter:Workflow	Bug	11858	Cannot start workflow plan.		Vaidas	
Matter:Workflow	Bug	12373	In the plan view of matters we have a problem with the way the plans are ordered.	Glasser & Glasser - 0185	Ken	23244
Matter:Workflow	Bug	12458	If there is a timeout when starting plan, next time when PMWin is started, plan has items, but it's status is still 'not started'		Tom	

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Matter:Workflow	Bug	13318	Access violations reported by Wilkes&McHugh	Wilkes & McHugh - 0244	Ken; Mike G	23208
Matter:Workflow	Feature	14397	Create utility that would complete all plans and mark unscheduled and uncompleted items as cancelled for matters that are closed		Ricky	
Matter:Workflow	Update	12132	Improvements for Workflow Speed		Tom	
Matter:Workflow	Update	13357	Cast filter tree item data to Integer where needed, eg.		Arturas	
Note DE	Bug	10268	Note saves without Confirmation message.		Vaidas	
Note DE	Bug	11065	Open Phone Note - Get error "Invalid variant type conversion" on Close. Try to Save, get error. Then close works. Does not happen on all notes. May be a database error, though this was a PM86.34.X database upgraded to PM87.24.6A. Test on WinXP		Tom; Donatas	
Note DE	Bug	11441	Able to unassign Creator and Author.		Vaidas	
Note DE	Bug	11683	Open Phone call de>Details tab>Entity listing. Assign all column in entity listing. Hit on View>Entity mass mail merge. Have got an error: 'Line 1: Incorrect syntax near ')'"		Dalia	
Note DE	Bug	11688	In Phone Call DE >Relate to entities tab change column caption ID to Code.		Dalia	
Note DE	Bug	11902	Error message when saving phone call		Vaidas	
Note DE	Bug	12456	8.0 Allowed tabbing within a note. 8.7 does not	Shriners - 0209	Ricky	
Note DE	Bug	13319	Access violations reported by Wilkes&McHugh	Wilkes & McHugh - 0244	Ken; Mike G	23208
Note DE	Bug	13572	Open Matter DE> Note listing. Select note that is assigned to a lot of Matters, Entities and Issues. Try open Note de> Relate to issues tab. Have got timeout error.		Dalia	
Note DE	Bug	13620	Memory Leak: Note DE, Other Party Cowboy hat button doesn't destroy opened Entity listing		Adas	

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Note DE	Bug	13635	Open a new note DE. Go to View Menu >Retrieve Templates tab. Select Note template with filled only Note type field. Try to same just created note. Have got message: Undefined Description. Fill description field.		Dalia	
Note DE	Update	11438	Change message which appears when trying to save Note without assigning additional entities to Note.		Donatas	
Note Listing	Bug	11062	Preview Note does not work correct.		Vaidas	
Note Listing	Bug	11094	Tab order is working incorrect in Note listing: after activating button 'Close' is activated button 'New Phone Call'. correct tab order is New > Open > New Phone Call > Close		Dalia	
Note Listing	Bug	11505	When creating new note item, the site is not the same as current site.		Rasa	
Note Listing	Bug	11649	Problem with filter.		Vaidas	
Note Listing	Bug	11667	Create some notes. After login to PM as SA and delete creator of these notes. All created notes were deleted (even if author of these notes was not this deleted user)		Dalia	
Note Listing	Bug	11797	Problem with matter security in Note Listing		Vaidas	
Note Listing	Bug	13952	Matter No. does not respect Use ClientNumber.MatterNumber from System Settings		TF	
Note Listing	Feature	11061	See Comments	Saga #632	Abe (632)	
Note Listing	Update	11063	The Preview item should not appear in Note listing if the user does not have Edit security function (see PCR 9589).		Tom	
Note Listing	Update	11069	Change Global Note Listing Filter "Show Notes For" to be look-up on all combinations (change "Show Notes For" to be "Notes to Show")		Tom; Donatas	
Note Listing	Update	12926	Add the Matter column back in for the Notes Listing		Tom	
Note Listing	Update	13351	Cast filter tree item data to Integer where needed, eg.		Arturas	

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Note Listing Hot Filter	Bug	13531	NoteFilter form doesn't destroy FilterCreatedInLastDays object		Adas	
Note Listing Hot Filter	Update	11067	Change Global Note Listing Hot Filter Type to be look-up on all combinations (change "Type" to be "Notes to Show")		Tom; Donatas	
Palm Integration	Bug	10519	Entity synchronization - <Esc> should not close Entity Select Screen.		Daiva	
Palm Integration	Update	11929	Type filter in Edit > Preferences > Synchronization Settings > Entity Types to Synchronize assignment screen is of old type		Donatas	
Palm Integration	Update	11957	Change User Preferences->Synchronization Settings-> Synchronize Entity Types screen		Darius K	
Phone Call DE	Bug	12133	Record in NENTAS for 'Other Party' of phone call is created only when creating a new phone call.		Donatas	
Phone Call DE	Bug	12148	Clicking No on Save Changes? Message saves this Phone Call.		Mike G	
Phone Call DE	Bug	12149	Other Party phone numbers would not be populated, if user clicks on Relate to Matters tab returns to Details tab, and chooses Other Party		Mike G	
Printing	Bug	11515	Sometimes in Report Preview screen Close buttons is disable (On Win98 it is almost always disable, on Win2K just sometimes)		Rasa	
Printing	Bug	11640	Report is not corect when printing timeslips		Vaidas	
Printing	Bug	12495	Cannot print Quick Report, which was saved to file: any listing ->Printer->Preview->Open Report from File->Load Report screen->Open->click Print Report and nothing happens		Mike G	
Printing	Bug	12497	Print Preview screen gets cut-off, when using 800x600. Cannot see "Save report to File" and "Close Report" buttons		Mike G	
Printing	Bug	12950	When printing from the workflow listing and then click print report and when the printer box pops up choose 2 copies, it only ever prints one. You can print 2 copies from preview report	Glasser & Glasser - 0185	Mike G	23665

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Printing	Bug	13271	Go to entity listing > click Printer icon > go to Customize tab > click [>>] button (add all available columns to print report) > click Preview > printer window closes. No report preview window appears.		Arunas	
Printing	Bug	13280	Go to Note Listing and add Matter Name column. Select Print Note Contents, have got message 'The column prefix 'NOTE' does not match with a table name or alias name used in the query'		Rasa	
Printing	Bug	13440	Print Preview does not release loaded bitmaps		Adas	
Query	Bug	11344	Problem with query in Timeslips listing			
Related Entities	Bug	10255	In Related Entities tab listing or Related Entities DE listing select Entity-Specific only and type search by some column, then switch to Matter-Specific only - type filter popup is hidden, filter is not removed and listing remains filtered		Donatas	
Related Entities	Bug	13431	Related Entities Listing - Notifier has not been destroyed		Adas	
Remote	Bug	13974	Downloading with Remote results in dropped connection error		Ken	
Remote	Update	11377	Launch PMRemote > select Download Entire Address Book along with Selected Matters > assign any matter to download > click Download Now (there are 2233 entities in PM). Download completes successfully. But after it I cannot login to Remote PMWIN.		Arunas	
Remote	Update	13828	Modify PMRemote to detect what kind of authentication is used on the local database and connect accordingly. Only convert the value in System Settings to "Prompt for All" if the Firm DB = NT Authentication and the Remote DB = SQL Authentication		TF	
Remote	Update	13860	When "Update Now" is selected, close the PMRemote Download window		TF	
Remote	Update	13868	Check to make sure the target database is the correct one when you click Download Now. If it does not match the source database, displays the same error as if you picked the wrong one is selected in the Target field		TF	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Remote	Update	13999	Change the database link message to read as follows "In order to download or upload with PMRemote, the user [username] must be a member of the sysadmin server role on the local SQL Server."		TF	
Security Settings	Update	11121	Restore 'Show All Paths' functionality		Donatas	
Security Settings	Update	13906	Add security function 'Report Errors and Send Feedback' for PCR 13700		TF	
Site Settings	Bug	13739	tab order is incorrect in Site settings->tab Drive Mappings-> Drive Mapping DE		DK	
Source Code	Bug	11708	Problems with PM on Windows 98 SE. When working with PM for a while, system runs out of system memory (there are ~500Mb free space on system disk and my computer has 256Mb of RAM).		Arunas	
Source Code	Bug	13234	Access Violation errors reported by Bacon & Wilson	Bacon & Wilson - 0201	Ken; Mike G	24025
Source Code	Bug	13311	Access violation error reported by James H. Seale	James H. Seale	Ken; Mike G	24583;23723;24426
Source Code	Bug	13364	Fix object TChangeTrack constructor in ChangeTrack.pas unit		Arturas	
Source Code	Bug	13539	Same matters, entities, documents, timeslips, notes and issues can be opened multiple times from RelatedTree.		Adas	
Source Code	Bug	13600	Open Matter Listing, Document Listing, Create New Document Profile, enter description. Try to change active site. Have got AV.		Aurelija	
Source Code	Bug	13622	"Change Site" can leave some windows opened. If opened window reports error (for ex. Description is empty) and refuses to close - active site changes but window stays opened.		Adas	
Source Code	Feature	13288	Add WaitForSingleObject(mx, 1); // request ownership of the mutex after mx := CreateMutex(nil, True, MutexName);. This must be done to PMWIN.dpr file.		Arturas	
Source Code	Update	11931	Review GetMatterSecurityWhere function in GlobalUtilities		Saulius	
Source Code	Update	13292	Memory leak in TADOFILTERQueryPM: the bookmark is not freed when it points to the record that doesn't exist in new dataset after quick filtering.		Arturas	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Source Code	Update	13493	Add three publish points		Saulius	
Source Code	Update	13672	Make date separator to be saved as UPPERCASE, because DATEFORMAT are saved as uppercase and in this case current dateseparator are not found in in dateformat		Saulius	
Spellchecker	Bug	13362	SpellCheck of note gives error 'RPC server is unavailable'		Ken; Mike G	24625
Spellchecker	Bug	13393	Spellchecker in Document Version - Description.		Daiva	
Spellchecker	Bug	13511	Open PMWin, check correct text for spelling errors anywhere (no "Spelling" window with suggestions). Close PMWin. WINWORD.EXE remains in Task Manager		Rimas	
Spellchecker	Bug	13574	Open any document profile. Create a new document version. Use Spellchecker for document version description. After Document is opening. Close Pmwin. Open that new document. Have got Word message :		Dalia	
System Settings	Bug	10101	Go to System Settings>Options tab, type search column Value Type - get error 'Invalid column name 'VALUETYPE''		Donatas	
System Settings	Bug	10102	Go to System Settings>Options tab, go to More Columns, remove all columns, except Value, press OK - get error message 'FilterQueryPMOptions: Field 'TYPE' not fout found'		Donatas	
System Settings	Bug	10607	Acces violation after copying settings.		Vaidas	
System Settings	Bug	13611	Date Formatter screen: Date Example and Time Example fields are empty.		Mike G	
System Settings	Update	11034	Change field labeling and order Drive Mapping DE form to be a little more logical.		Donatas	
System Settings	Update	13664	Review and update Date Separator field functionality		DK	
Timeslip DE	Update	10937	Change parameters that Practice Manager will support for billing export modules.		Donatas	
Timeslip Listing	Bug	10923	Export module problem - see comments.		Darius K	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Timeslip Listing	Bug	11250	Eight of the display fields for the Timeslip listing have spaces before them, which is messing up the sort order. Please remove the spaces.		Tom	
Timeslip Listing	Bug	11507	Access violation when opening query.		Vaidas	
Timeslip Listing	Bug	11635	Search by any column in timeslip listing. Open Timeslip Archive Listing. Search screen still active. Now drag and drop any column. Search screen is active, but is not moved with column. The same can get in Timeslip listing too.		Dalia	
Timeslip Listing	Bug	11653	Select 'None' in Billing Program field> General tab>Timeslip settings. Rerun PMWIN. Open Timeslip listing. Hit on Export using right click. Have got an error: Could not launch export application.		Dalia	
Timeslip Listing	Bug	13055	Publish Point PPGUID_TimeslipListingQueryAdapter is not being handled properly		Edmundas	
Timeslip Listing	Update	13348	Cast filter tree item data to Integer where needed, eg.		Arturas	
Timeslip Listing	Update	13779	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 requires a current record.'	NFI Industries 0262	ken	25142
Timeslip Listing Hot Filter	Bug	13533	TimeslipFilter doesn't destroy FilterInLastDays object.		Adas	
User Preferences	Bug	10126	Adapters menu is not displayed in User Preferences, though required dll's are registered, while in System Settings it is visible		Rimas; Donatas	
User Preferences	Bug	12448	In some dbs under edit preferences - you cannot select the spellcheck application- nothing shows up.		Ken	
User Preferences	Info	11722	Brach is expended after answer, if is checked or not checked checkbox 'Expand workflow plan branch after answering question' in User Preferences>Workflow		Dalia	
Utility	Bug	11876	In 'PM Document Template Utility' screen> Log tab move 'Status' column next to 'Component Description' column, then go to another tab and return to Log tab, have got an error 'Invalid object name 'ASM_UPDTELOG''		Rasa	

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Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Utility	Bug	11940	When run Convert Utility, the fields of Address Template component is not updated.		Rasa	
Utility	Bug	11947	When you have Word XP installed on computer and run Convert Utility, then just the components created with Word97 and Word XP are updated. The components where engine=Word 2000 are not updated.		Rasa	
Utility	Bug	12045	After upgrade from 8.0.78 to 8.7.28, Mat_CivilActNo field is not renamed to Mat_CaseNo.		Rasa	
Utility	Bug	12047	After upgrade from 8.0.78 to 8.7.28, some Entity Type fields are not converted.		Rasa	
Utility	Bug	12049	A component has Engine=Default (in 'Document Component Design' screen). Run PMTemplate utility, this component is not updated.		Rasa	
Utility	Bug	12137	TiffView functionality is not correct	Patten - 0206	Ken	23409
Utility	Bug	12466	We found problem with WordSpell.dll file. It will load only if in file attributes will be checked on "Archive" or in some other systems something like "Ready for archiving".		Saulius	
Utility	Bug	12556	When running PMTemplate, we received timeout error		Mike G	
Utility	Bug	13685	Access violation in wfstatfix.exe		TF	
Utility	Feature	12426	MS Word Document Assembly Component Fix Utility		Tom	
Utility	Feature	12512	While running MSWDAFIX.EXE utility if login fails (server name and/or database name and/or user name is incorrect), a message informing about it should be displayed and the process stopped.		Sigita	
Utility	Info	11528	When I run convert.exe straightly from pmroot/Utilities folder, I get "UDL not found". I must copy the utility to pmroot folder to run it.		Daiva	
Utility	Update	11606	PMTemplate utility - changing of status of Change Sets.		Tom; Daiva	
Utility	Update	11880	Create Utility for deleting workflow items under unaccepted answers on completed plans.		Tom	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Utility	Update	11882	Run a Convert Utility. When any component is updating, stop process (hit STOP button in PM Document Template Utility screen). After that this component is broken - not all fields are updated and the status of the component is marked as 'updated'.		Rasa	
Utility	Update	12356	To the window for convert97 and pmtemplate, add a text note at the top of the window that reads as follows:		Tom	
Utility	Update	12604	<\\L\td\v\sq1\1D\QA\builds\pm\pm_v87sp1\build873502\files\utilities\MSWDAFIX1005.EXE> does not include MSWDAFIX.txt. <\\L\td\v\sq1\1D\QA\builds\pm\pm_v87sp1\build873502\files\utilities\PMTemplate1126.exe> does not include PMTemplate.txt		Tom	
Workflow Calendar	Bug	10105	User without Edit Workflow security can Change Matter from the right-click menu.		Arunas	
Workflow Calendar	Bug	10487	When close workflow calendar, also closed Pmwin.		Rasa	
Workflow Calendar	Bug	12568	In Workflow Calendar set filter to show only Completed activities; Completed/Held by Event/Due date. In Workflow Calendar also appear items with today's Event/Due date that are Not Started and In Progress.		Ligita	
Workflow Calendar	Bug	12574	In Workflow Calendar when filter is set to show all Cancelled Workflow Activities; Cancelled Items by Cancelled Date, all unscheduled activities appears in current day although have different Cancelled Date.		Ligita	
Workflow DE	Bug	11410	Problem with "Show All Paths" functionality in Workflow paths.		Vaidas	
Workflow DE	Bug	11513	When Upgrading From 8.0 to 8.7 plan items that have their due date linked to the completion of a parent wf item lose than link.		Ken	
Workflow DE	Bug	11590	Create a plan in Workflow settings. Do not insert any question or answer to this plan. After open matter and add this plan. Start this plan, insert ex. appointment. Now insert questions and answer. Cannot edit question or answer.		Dalia	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Workflow DE	Bug	11593	Is checked on Responsible Entities (responsible for completion of Workflow Activities) and Notify Only Entities (to receive notice only) in Plan DE>workflow settings. Now open matter DE>Workflow tab. Add this plan, after start it.		Dalia	
Workflow DE	Bug	12032	Changing the date in the last Workflow History record is causing the Event Date field to be cleared and the item becomes Unscheduled		Tom	
Workflow DE	Bug	12052	After upgrade there are critical dates items that have STATUS = 1. Critical Date item can have only 2 statuses, Not complied with, Complied with (0 and 2).		Darius K	
Workflow DE	Bug	12105	Order of Tickler fields on Workflow DE and in listings		Tom	
Workflow DE	Bug	12130	In Court Event DE, click on Judge faucet filter - on big database get timeouts	Glasser & Glasser - 0185	Gedas	23248
Workflow DE	Bug	12212	Incorrect behavior on the Workflow Filter - Entities tab when choosing entities		Tom	
Workflow DE	Bug	13399	Invoke atached to tabs child forms FormClose method		Saulius	
Workflow DE	Bug	13576	It is possible to open multiple instances of same entity from Workflow DE Entities tab		Donatas	
Workflow DE	Bug	13708	User creating workflow item loses changes to the Time fields upon selecting another tab. When returned to item's main screen, the default time settings had been restored over the user's selections. Tab change should save info as in other de forms		Ken F, Mike G	24673
Workflow DE	Bug	13713	Message in Workflw DE when creating a Task or Critical Date		Abe	
Workflow DE	Update	11117	Restore "Show All Paths" Functionality in Workflow Plans		Tom	
Workflow DE	Update	11457	When a Workflow Item on a Plan does not have a branch under it, do not show the Delete Branch - Shift Branch Up menu item		Tom	
Workflow DE	Update	11663	When marking a plan complete, give the option to "Delete branches under unselected answers."		Tom	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Workflow DE	Update	11674	If an unscheduled item is marked completed and the Event/Due date is null, populate the Event/Due date with the completion date		Tom	
Workflow DE	Update	11739	Items under unused answers should be updated along with visible items when a plan is marked complete (the action is dependent upon the choice on the dialog).		Tom	
Workflow DE	Update	11747	Update Workflow menu's for listing and Calendar		Tom	
Workflow DE	Update	11841	Add system setting to enable ticklers		Tom	
Workflow DE	Update	12027	Completed or Cancelled Workflow items can not have their Completed or Cancelled date (MRULASS.DATE2) set to NULL		Tom	
Workflow DE	Update	12034	Allow edit the Status - on field from the DE form		Tom	
Workflow DE	Update	12054	After upgrade there are workflow items in listing that have date completed field populated but status is not 'Completed'		Darius K	
Workflow DE	Update	12075	Sub-queries will not always use indexes and also the one in below creates table pool		Darius K	
Workflow DE	Update	12213	Workflow Entities - only Staff are able to be assigned as responsible or Notify. See comments	Glasser & Glasser - 0185	Cynthia K	22954
Workflow Listing	Bug	10154	Right-click (or View) menu filter works incorrectly for Unscheduled items		Donatas	
Workflow Listing	Bug	10286	When you execute a workflow activity with actions attached, if, after you execute the linked Actions you return to the Plan screen, the Workflow Activities do not appear as marked complete, unless you manually Refresh the screen.		Richard	
Workflow Listing	Bug	10300	Status change DE does not appear, when status of item is changed from workflow plan by right-clicking. Instead, status is changed to selected with current date		Donatas	
Workflow Listing	Bug	11384	When deleting workflow item with workflow linked activities and hit Yes in the question 'Go to Linked Activity?', not Linked Activities tab displayed.		Rasa	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Workflow Listing	Bug	11519	The Code field is being populated with the name when you use the drop down to look-up a value. If you enter a code, it works fine.		Tom	
Workflow Listing	Bug	11570	Print Preview is not working in Workflow listing.		Dalia	
Workflow Listing	Bug	11839	Filter is working incorrect in Workflow listing.		Dalia	
Workflow Listing	Bug	11867	Is not synchronized 'Completed' checkbox in Quick filter with workflow filter and right click filter.		Dalia	
Workflow Listing	Bug	11971	Status of workflow item cannot be changed when item is from different than current site and site security are enabled		Saulius	
Workflow Listing	Bug	12039	When you display the global workflow listing, using the default filter, which includes uncompleted items, and then switch to the calendar view, none of the uncompleted items are displayed.		Richard	
Workflow Listing	Bug	12288	Can't find a column under global workflow for "activity is related to".	Glasser & Glasser - 0185		23109
Workflow Listing	Bug	12464	After changing the date of a WF item that has been set to repeat, user gets information message "You have changed the date of repeating item. The repeating items will not reflect this chage." 'Chage' needs to be spelled correctly.		Mike G	
Workflow Listing	Bug	12562	When user do not have Delete Workflow security assigned, he is still able to delete item, but only if he does right-click-Delete. CTRL+D or File-Delete doesn't delete.		Ligita	
Workflow Listing	Bug	12570	When Workflow Calendar filter is set to show only Completed activities go to Workflow Listing and try to check uncompleted activities in Listing Toolbar. It doesn't work; try another time - uncompleted activities checkbox is checked.		Ligita	
Workflow Listing	Info	13565	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.		Arunas	
Workflow Listing	Update	10729	Add ability to print workflow item notes when printing the listing. Add "Instructions" as being an available field for reports		Cynthia K	

Area	Type	ID	Description/Comments	Site	Contact	Support Tickets
Workflow Listing	Update	10927	Modify checking of workflow plan items to only include those items before all unanswered questions.		Tom; Donatas	
Workflow Listing	Update	11620	Update the workflow listing filter queries for Completed/Uncompleted.		Tom	
Workflow Listing	Update	11897	Update Multiselect workflow items Delete action		Tom	
Workflow Listing	Update	11900	Update of Workflow Filter Fields		Tom	
Workflow Listing	Update	11953	Change layout of Workflow Notes in Workflow report		Ricky	
Workflow Listing	Update	13265	Enable New, Open, and Delete buttons on the Select Window when creating a workflow item.		Tom; Ligita	
Workflow Listing	Update	13350	Cast filter tree item data to Integer where needed, eg.		Arturas	
Workflow Listing Query	Bug	12548	If workflow activity has more than one entity assigned responsible or notify only in Workflow Listing appears several identical rows when Workflow Listing Query Is Responsible or Is Notify only filter is applied.		Ligita	
Workflow Settings	Bug	12618	Access violation in Workflow Settings > Holidays		Mike G	
Workflow Settings	Bug	13019	Access violation error, when trying to type search Date column in Holidays tab of Admin Workflow settings		Mike G	
Workflow Settings	Bug	13050	Holidays tab: add November and December to type search drop down for Date column		Mike G	
Workflow Template	Bug	12454	Activity Templates did not convert the description	Shriners - 0209	Ricky	
Workflow Template	Bug	13276	In System Settings there is one Tickler enabled; in Workflow template Display Tickler fields are set to 2, 3, continuously 5 (in exact order) days before Event Date; in workflow DE, created with this template, there appears Tickler 5 days before.		Ligita	

9. 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.

10. 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.

11. 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.

12. Risk 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

13. 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.

14. 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.

15. 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

16. 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

17. 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

18. High-Level Project Plan

The following table outlines the high-level milestones developed for this release of Project Summary Specification v2.0 (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.	Project Preparation	205	N/A	04/03/2002		
2.	Alpha1 Coding and Testing (Original scope)	34	N/A	08/16/2002	N/A	08/16/2002
3.	Alpha2 Coding and Testing (Dupe PCRs)	110	N/A	05/02/2003		
4.	Alpha3 Coding and Testing (SP3-related work)	25	N/A	05/09/2003		
5.	Beta Testing and Bug Fixing	25	N/A	06/13/2003		
6.	Acceptance	7	N/A	06/20/2003		
7.	Availability Announcement	1 day	N/A	06/23/2003		
8.	Orientation	1 day	N/A	06/24/2003		