Improving the Business of Law

Release Notes

Version 8.7, SP1, SP2 & SP2A
February 4, 2003

RealLegal

Practice Manager™

Version 8.7, SP1, SP2 & SP2A

Dated **February 4, 2003**
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Glossary 1

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Practice Manager 8.7 Introduction

What is Practice Manager 8.7, SP1 and SP2?

Practice Manager 8.7

Practice Manager 8.7 (PM87), developed under the codename Andes:Salado, is an incremental release of RealLegal Practice Manager. It is intended to add new functionality, enhance existing functionality, and correct defects that have been identified in previously releases of Practice Manager. This release includes 1,225 changes out of 1,519 requests submitted, as follows:

- 29 new features, out of 31 requests submitted
- 326 enhancements and updates to existing functionality, out of 392 requests submitted
- 870 defect fixes, out of 1096 reports submitted

Service Pack 1 (PM87 SP1)

Practice Manager 8.7 SP1 (PM87 SP1), developed under the codename Andes:Corazon, is a service pack release for RealLegal Practice Manager 8.7. It is intended to enhance existing functionality and correct defects that have been identified in previously releases of Practice Manager. This release includes 314 changes out of 454 requests submitted, as follows:

- 15 new features, out of 18 requests submitted
- 139 enhancements and updates to existing functionality, out of 181 requests submitted
- 160 defect fixes, out of 254 reports submitted

Service Pack 2 (PM87 SP2)

Practice Manager 8.7 SP2 (PM87 SP2), also developed under the codename Andes:Corazon, is a service pack release for RealLegal Practice Manager 8.7. It is intended to enhance existing functionality and correct defects that have been identified in previously releases of Practice Manager. This release includes 194 changes out of 236 requests submitted, as follows:

- 4 new features
- 58 enhancements and updates to existing functionality
- 132 defect fixes

This release of Practice Manager replaces all versions previously released, and provides a direct upgrade path to future versions of Practice Manager.

Service Pack 2A (PM87 SP2A)

Practice Manager 8.7 SP2A (PM87 SP2A), also developed under the codename Andes:Corazon, is a service pack release for RealLegal Practice Manager 8.7. It is intended to enhance existing functionality and correct defects that have been identified in previously releases of Practice Manager. This release includes 31 changes out of 42 requests submitted, as follows:

- 2 new features
- 31 enhancements and updates to existing functionality
- 8 defect fixes

This release of Practice Manager replaces all versions previously released, and provides a direct upgrade path to future versions of Practice Manager.

About this Manual

The release notes are intended to both compliment and supplement the Practice Manager User’s Guide and Administrator’s Guide, as well as the release notes previously prepared for Practice Manager versions 8.6 (pm86.rn.pdf). Those release notes can be in version the Help folder within the <pmroot> directory.

Please note that the images used in this manual were captured on a workstation running Microsoft Windows XP Professional at 800 x 600 resolution set to 32-bit Color. The actual appearance of the screens might differ on your workstation, depending on what operating system you are using, as well as the resolution and color depth of your screen and display settings.

Terminology Used in the Manual

These are some terms used throughout this manual:

PCR

A PCR – Product Change Request – is the term RealLegal uses for any change request made and/or included in a product. PCRs can range from new features that add functionality to Practice Manager, or updates and enhancements that improve existing functionality, or the correction of defects in version earlier versions of Practice Manager.

If your organization has a PCR they would like to submit for consideration in future releases of Practice Manager, those should be submitted to your RealLegal Account Manager. They will, in turn, submit the request to Product Management. Note that all PCRs are entered into our tracking system, even though they may not immediately appear in an upcoming release. If a similar request already exists, we update that PCR with information that you submit, which helps us to prioritize and schedule such changes.

Build

A build represents the compilation of the Practice Manager executable, and the packaging of all related components, including the SQL, that is turned over to QA for testing and/or certification. The build designation consists of four numbers separated by decimals (e.g., **8.7.24.6**). Each number represents a specific level in the development of the product:

- The first number represents the architecture on which the product is built. When there is a major change in architecture, either from a data, logic or user interface perspective, this number is incremented by one, and the remaining three numbers are reset to "1".

  In this example, **8** represents Version 8 of the product's architecture.

- The second number represents "feature set" on which the product is built. When there is a major change in the product feature set (e.g., a new module is added, or a substantial number of features are added to several existing modules), this number is incremented by one, and the remaining two numbers are reset to "1".

In this example, **7** represents the seventh feature set for Version 8 of the product's architecture.

- ➢ The third number represents the version of the database within the release. When there is a change to the database, this number is incremented by one, and the remaining number reset to "1".

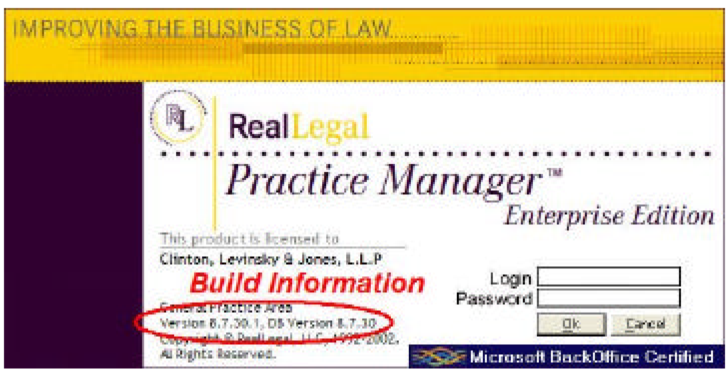
  In this example, **24** represents the twenty-fourth version of the database within the Feature Set #24 for Version 8 of the product's architecture.

- ➢ The fourth number represents the number of times the Practice Manager Executable has been compiled since the last database change.

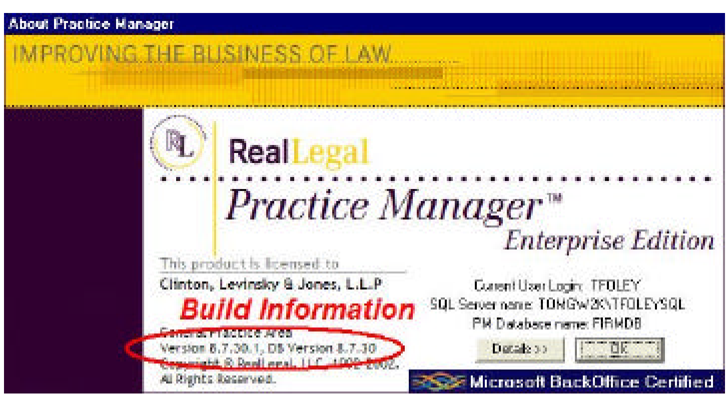
  In this example, **6** represents the second version of the executable released on Database Version #24 within the Feature Set #7 for Version 8 of the product's architecture.

You can determine the Build in one of two ways:

1 By looking at the Practice Manager Login window:



2 By looking at the Practice Manager – Help – About window:



If the DB Version appears in red, it means that the version of Practice Manager you are running and the database are not on the same version.

- If the third number of the Version is higher than the third number of the DB Version, you need to upgrade your database.
- If the third number of the Version is lower than the third number of the DB Version, you need to upgrade your installation of Practice Manager, replacing the existing file set.

Running the Practice Manager Upgrade Program will handle either of these tasks automatically.

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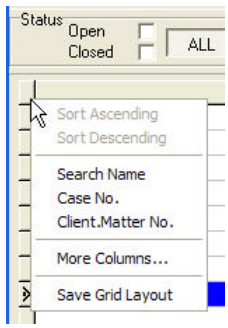
General

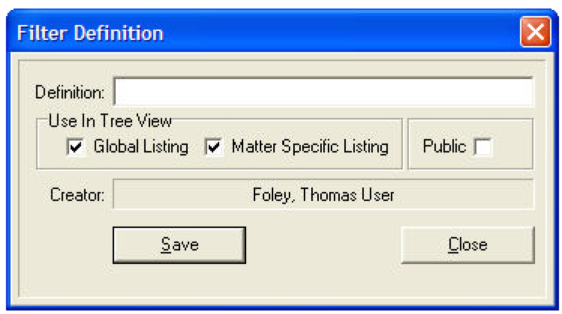
Summary of General Changes

There 313 general PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
7732	Date fields cannot accept a date older than 01/01/1753. The error message has been updated to clarify that dates older than this are invalid.	PM87
7770	If you need to remove the “mask” from a phone number field so you can enter a non-standard phone number, such as an international number, the field you are removing the mask from must be empty. To remove the mass, make sure the field is empty and then press Ctrl+F.	PM87
8639	Filtering by date has been enabled in all listings, and optimized so that the filtering does not actually occur until you enter all or part of a date, and then press Tab.	PM87
9136, 9137, 9138, and 9139	All listing in Practice Manager have been updated to respect the new Grid colors implemented in this release (see "Appearance Preferences" beginning on page 2-19)	PM87
Multiple	Additional Support for Third-party Applications (see page 2-26)	PM87
Multiple	Login and Sites (see page 2-9)	PM87
Multiple	Menu and Toolbar Changes (see page 2-14)	PM87
Multiple	Palm Integration (see page 2-25)	PM87
Multiple	PM Desktop Views (see page 2-27)	PM87
Multiple	PMRemote (see page 2-23)	PM87
Multiple	Preferences (see page 2-16)	PM87
Multiple	Updated Asssign/Unassign Functionality (see page 2-15)	PM87

PCR	Description	In Version
Multiple	In previous version of Practice Manager, if you inadvertently removed all fields from a listing, you were not able to access the right-click menu or More columns… functionality. This was a limitation in the listing component. That component has now been updated so that if you remove all fields from the listing, you can click on the block in the upper-left corner of the listing, and the right-click menu appears. 	PM87
8449	Practice Manager does not support Large Fonts on the display.	PM87 SP1
11097	On Filter field section windows (pick screens), there was a limit in previous releases of Practice Manager whereby only 20 records could be selected for filtering purposes. That restriction has been removed.	PM87 SP1
11113	Scroll bars have been added to the Help-About-Details window.	PM87 SP1
11884	A Details button has been added to the “Connection Dropped” message to allow the user to view the reasons for the dropped connection. If a connection drops, the information from the details window can help application support diagnose the problem.	PM87 SP1
12215	The following is a review of Save behavior when working with data entry forms: Matter – New and Open – Make entries/changes in any field • Switching tabs saves the record without a prompt. • Choosing Close displays a prompt if any unsaved changes exists. The Save prompt on close gives you the option of saving the changes (yes), discarding the changes (no), or returning to the data entry form without saving the changes (cancel). Entity – New/Open – Make entries/changes in any field • Switching tabs saves the record without a prompt.	PM87 SP1

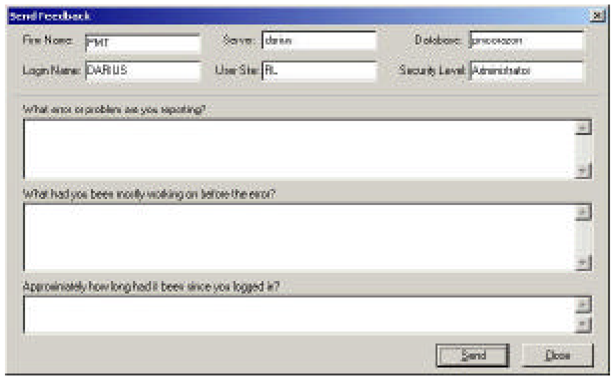
PCR	Description	In Version
	• Choosing Cancel/Close displays a prompt if any unsaved changes exists. The Save prompt on close gives you the option of saving the changes (yes), discarding the changes (no), or returning to the data entry form without saving the changes (cancel). Document – New/Open – Make entries/changes in any field • Switching tabs saves the record without a prompt. • Choosing Cancel/Close displays a prompt if any unsaved changes exists. The Save prompt on close gives you the option of saving the changes (yes), discarding the changes (no), or returning to the data entry form without saving the changes (cancel). Note – New/Open – Make entries/changes in any field • Switching tabs saves the record without a prompt. • Choosing Close displays a prompt if any unsaved changes exists. The Save prompt on close gives you the option of saving the changes (yes), discarding the changes (no), or returning to the data entry form without saving the changes (cancel). Timeslips – New/Open – Make entries/changes in any field • Choosing Close displays a prompt if any unsaved changes exists. The Save prompt on close gives you the option of saving the changes (yes), discarding the changes (no), or returning to the data entry form without saving the changes (cancel). Workflow – New/Open – Make entries/changes in any field • Switching tabs saves the record without a prompt. • Choosing Cancel/Close displays a prompt if any unsaved changes exists. The Save prompt on close gives you the option of saving the changes (yes), discarding the changes (no), or returning to the data entry form without saving the changes (cancel). Phone Message – New/Open – Make entries/changes in any field • Switching tabs saves the record without a prompt. • Choosing Close displays a prompt if any unsaved changes exists. The Save prompt on close gives you the option of saving the changes (yes), discarding the changes (no), or returning to the data entry form without saving the changes (cancel).	

PCR	Description	In Version
	Receive a Phone Call – New/Open – Make entries/changes to any field • Switching tabs saves the record without a prompt. • Choosing Cancel/Close displays a prompt if any unsaved changes exists. The Save prompt on close gives you the option of saving the changes (yes), discarding the changes (no), or returning to the data entry form without saving the changes (cancel). Place a Phone Call – New/Open – Make entries/changes to any field • Switching tabs saves the record without a prompt. • Choosing Cancel/Close displays a prompt if any unsaved changes exists. The Save prompt on close gives you the option of saving the changes (yes), discarding the changes (no), or returning to the data entry form without saving the changes (cancel).	
12236	The following is a clarification of the Save/Retrieve Filter functionality and settings on the Filter Definition window.  The filters are saved for specific listings, as follows: • Entity (same listing for Global and Matter-specific) • Timeslip (same listing for Global and Matter-specific) • Matter (one listing for Global) • Groupware (same listing for Global and Matter-specific) • Note (one listing for Global and a separate listing for Matter-specific) • Document (one listing for Global and a separate listing for Matter-specific) • Workflow (same listing for Global and Matter-specific)	PM87 SP1

PCR	Description	In Version
	When you save a filter, there are two checkboxes in the Use in Tree View group. • The filter is related to one of the listings, meaning that it is available wherever that listing is used when filtering is enabled. So, the filter saved for the Entity Listing is available on all entity listings that use that LISTINGID, including the global and matter-specific entity listings. • The Global Listing checkbox means that listing will appear in the Filter Tree View on the Global Listing. This does not mean the filter is specific only to global listings, which is how some users have interpreted this setting to be. • The Matter Specific Listing checkbox means that listing will appear in the Filter Tree View on the Matter-specific Listing. This does not mean the filter is specific only to matter listings, which is how some users have interpreted this setting to be. When retrieving a filter, the list of available filters is based on the following: • All filters saved for the specific listing, regardless of where that listing is opened up from. • When only "My Filters" is checked, it includes all filters where the active user is the creator. • When only "Public Filters" is checked, it includes only public filters. • When "My Filters" and "Public Filters" are checked, it include filters where the active user is the creator plus any public filters saved by others. When viewing the filter tree, the lists of available filters should be those filters that meet the following criteria: • My Filters for the listing – Public and Private OR • Public Filters for the listing created by others – WHERE • The appropriate flag – Global Listing or Matter-specific Listing – is set. With the exception of Documents and Notes, the global and matter-specific listings use the same list. This means the following: • The list of available filters for retrieving on the global and matter-specific listings and tree views is the same.	

PCR	Description	In Version
	• When setting preferences for the global and matter-specific listings, the list of available filters is the same. For documents, the global and matter-specific listings use different lists. This means the following: • Document filters created for the global document listing are not available on the matter-specific document listing. • Document filters created for the matter-specific document listing are not available on the global document listing. • The checkboxes for Global Listing and Matter-specific Listing, when saving a filter, are really not applicable, except for the listing supported by the filter. For notes, the global and matter-specific listings use different lists. This means the following: • Note filters created for the global note listing are not available on the matter-specific note listing. • Note filters created for the matter-specific note listing are not available on the global note listing. • The checkboxes for Global Listing and Matter-specific Listing, when saving a filter, are really not applicable, except for the listing supported by the filter. Matter Tree View uses the same stored filters as the matter-specific listings. Entity Tree View uses the same stored filters as the global listings.	
12494	You can now load and print saved reports (*.QRP files) from any Preview window; however, due to limitations of Quick Reports, the Printer Setup dialog box will not display (this is what was preventing printing in previous releases of Practice Manager of saved reports). Instead, Practice Manager will automatically print the report directly to the default printer.	PM87 SP1
13453, 13457, 13361, 13392, 13510, and 13573	‘RPC Server Unavailable’ and WINWORD program errors have been resolved. These were the results of a conflict between the Note SpellChecker and Document Assembly.	PM87 SP2
13512, 13671, 13610, and 13663	In earlier versions, it was possible to get “invalid date” errors for dates that appeared to be correct. This is because of an invalid separator used in System Settings. This has been corrected.	PM87 SP2

<table>
<tr><th>PCR</th><th>Description</th><th>In Version</th></tr>
<tr><td>13699 and 13492</td><td>
A new feedback form as been added to Practice Manager. This form is accessible from the Help menu, or from an error message:


Clicking the Report button displays the feedback form:


The first six fields are automatically populated if it is possible to retrieve the information. If any fields are blank, please attempt to populate them yourself.
The first large field let’s you describe what action you were doing when you received the error or found the problem. The more steps you can provide, the better chances we will have of diagnosing and resolving the issue.
The second large field helps us diagnosis the issue, but allowing you to describe in more general terms, what you had been mostly working before the error occurred (e.g., “I had been creating and assigning lots of entities to matters” or “I had been generating documents all morning” or “I had spent all afternoon entering timeslips”).
The last field let’s us know how long it had been since you last started and logged on to Practice Manager. We are mostly trying to find out if the issue arose when you first logged in and started working, or if it occurred after you have been logged in for many hours.

Clicking Close creates a log entry in <pmroot>\logs\.
Clicking Send creates a log entry in <pmroot>\logs\ and opens up an e-mail with the log attached. This e-mail is pre-addressed to pmsupport@reallegal.com.

</td><td>PM87 SP2</td></tr>
</table>

PCR	Description	In Version
	Changing the default e-mail address The PMFeedback.cfg.xml file contains the values for the default address fields: <?xml version="1.0" encoding="Windows-1252"?> <configuration> <appSettings> <!-- User application and configured property settings go here.--> <!-- Example: <add key="settingName" value="settingValue"/> --> <add key="feedback.TO" value="pmsupport@reallegal.com" /> <add key="feedback.CC" value="" /> <add key="feedback.BCC" value="devsupport@pmt.lt" /> </appSettings> </configuration> If, as the administrator, you want the e-mails to come to you first, and then you will forward to RealLegal Practice Manager Support, you can change the **value** between the quotation marks on **feedback.TO** line. If, as the administrator, you want to be CCd on all e-mails sent to RealLegal Practice Manager Support, you can change the **value** between the quotation marks on **feedback.CC** line. If you want to add multiple address to any line, keep each address within the quotation marks, but separate them with a semi-colon (;).	
13544	ImageViewer now saves its settings, specific to a user on a workstation. This means that different users on one workstation can have different settings. Likewise, a user can have different settings on different workstations, especially if the hardware is different.	PM87 SP2
13269	You can now print multiple copies of the listings from the Print option. In earlier versions of Practice Manager, you had to use the Print Preview option if you wanted to print multiple copies.	PM87 SP2
13507	Clarifications on saved filters and queries: • Filters created and saved in earlier versions of Practice Manager will continue to work with this release of Practice Manager. • Some queries created and saved in earlier versions of Practice Manager may no longer work in this version of Practice Manager, as parameters and properties of the query builder have changed. The only solution is to recreate the query. If you have a large number of queries, please contact application support to discuss possible solutions. • The Global and Matter Document listings are actually two different listings. This means that filters and queries created for one are not available for the other.	PM87 SP2

PCR	Description	In Version
	• The Global and Matter Note listings are actually two different listings. This means that filters and queries created for one are not available for the other.	
13901	Practice Manager has now been certified for use on Windows XP Professional Edition.	PM87 SP2A
13880, 13882, 13884, and 13902	OutlookXP has now been certified for use with Practice Manager. The following known issues currently exist and will be addressed in a future release of Practice Manager: • You may not be able to drag and drop e-mails from personal folders. This behavior is not consistent. We recommend that you carry out dragging and dropping from the main mailbox before moving an item to a personal folder. • You can only drag and drop attachments from the body of an email. If the attachment is displayed below subject line, as would be the case with a plain text- or HTML-formatted e-mail messge, you cannot drag and drop it into Practice Manager. You can choose “Save As” and save the attachment, then drag it into Practice Manager. • You cannot drag and drop e-mails from the Preview Pane or the quick Auto Preview.	PM87 SP2A

Login and Sites

There are 23 Login- and Site-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
8626 and 8848	Site-specific Functional Security (see page 2-10)	PM87
8847 and 8848	Site Types (see page 2-13)	PM87
9037	Support for the pmwin.wav sound file, which could be automatically launched when Practice Manager was started in earlier version of Practice Manager, as been removed.	PM87

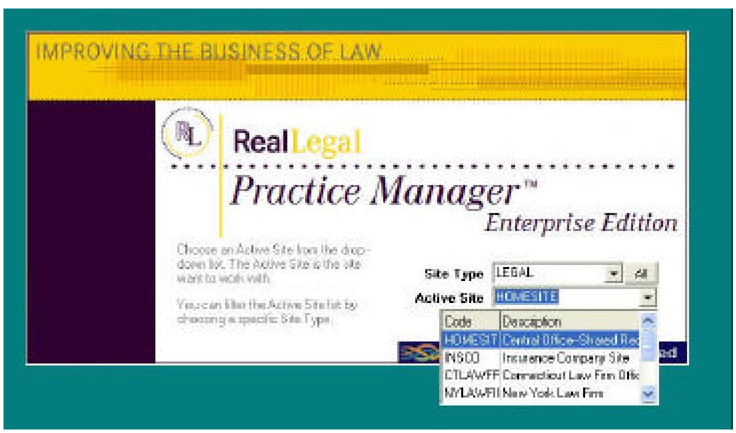
Site-specific Functional Security

PCR 8626 and 8848

If your firm has more than one site, it is now possible to login and access the records of more than one site in Practice Manager.

In the past, you had a login to a single site. At that site, you could work with records in accordance with your security, for example, creating or modifying matters, entities, documents, and notes. You could be assigned to other sites, but you were only allows to view the records of those sites. You could not edit them, nor could you create records for those sites.

In PM87, you can now login to any site to which you have a security assignment. In order to enable this functionality, your system administrator, through Functionality Security, must assign a security role to your user account at each site you need to be able to access. Then, when you login, you can select the site where you want to carry out work.



The site that is pre-selected is the one that is set as your Default Site in your entity record.

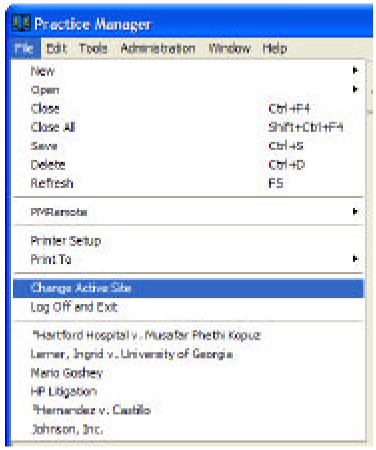
The site you select when you login is your Active Site, and this is the site where you are working with records, including creating and modifying them.

If you have only one functional security role assignment, this window does not appear and you are automatically logged into the site associated with that assignment.

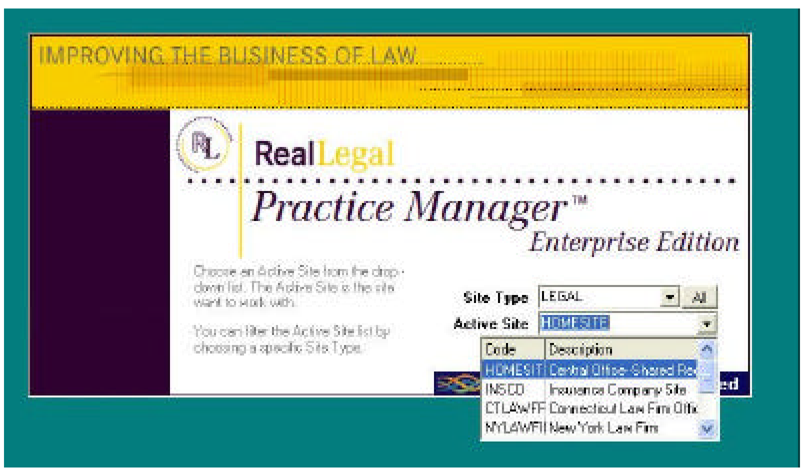
To Switch to a Different Active Site

To switch to a different Active Site, you do not need to exit Practice Manager. All you need to do is carry out the following:

1 Choose Change Active Site from the File menu.



The same select site window appears from the login process.



The site you are currently logged into (the Active Site), is pre-selected.

2 Choose a new Active Site.

All previously open Practice Manager windows close. If a window has unsaved changes, you will be prompted to save or lose the changes. You are now logged into the new Active Site, and can work with Practice Manager in accordance with the Security Role assigned to you at that site.

Site Security vs. Site-specific Functional Security

Site-specific logins should be confused with assignments to sites. For example, your firm may have one corporate office and ten remote offices. You work in one of the remote offices, but need to also be able to work on records at the corporate office and records at three of the remote offices, as well as access the records at three of the remaining six offices (you do not need to access nor carry out work in the other four remote offices). Using the following grid, you will have security configured as follows:

Office Name	You need to be able to…	Your will have the following security assignments…
Site 1. Denver - Corporate	Login to the site and work on records there.	Functional Security assignment for Login, and a Site Security assignment to access the records.
Site 2. San Francisco	This is where you normally work, and you need to be able to login to the site and work on records there.	Functional Security assignment for Login, and a Site Security assignment to access the records. This site will be configured as your Default Site in your entity record.
Site 3. Chicago	Login to the site and work on records there.	Functional Security assignment for Login, and a Site Security assignment to access the records.
Site 4. Atlanta	Login to the site and work on records there.	Functional Security assignment for Login, and a Site Security assignment to access the records.
Site 5. New York	Only need to access records there. You do not need to work on them.	Site Security assignment to access the records.
Site 6. Dallas	Only need to access records there. You do not need to work on them.	Site Security assignment to access the records.
Site 7. Phoenix	Only need to access records there. You do not need to work on them.	Site Security assignment to access the records.
Site 8. St. Louis	You do not need to work on records at this site, nor to you need to access records there.	None.
Site 9. Miami	You do not need to work on records at this site, nor to you need to access records there.	None.
Site 10. Tampa	You do not need to work on records at this site, nor to you need to access records there.	None.

For more information on Security Settings and configurations, refer to the Security chapter in the PM86 Release Manual.

Active Site vs. Default Site

As previously mentioned, each user of Practice Manager is assigned to a Default Site. At that Default Site, they have a security level assigned to them. In previous versions of Practice Manager, you could only create, modify and delete records at that site. The only way to do the same for records at other sites was to have your System Administrator change the Default Site in your entity record, and then have you log back into Practice Manager.

With this release of Practice Manager, you can now select, at login, the site where you want to create, modify, and delete records. The site you select is called you Active Site, the code of which is displayed in the status bar at the bottom of the Practice Manager window.

In the above example, the user's Active Site is the one where the Code is HOMESITE.

What actions you can carry out on records depends on the Security Role assigned to you at that site:

If you have…	Then you can…
Create or Add Permission	You can create or add new records at the Active Site.
Edit or Change Permission	You can edit or change records at the Active Site.
Delete or Remove Permission	You can delete or remove records from the Active Site.
List Permission	You can list records from the Active Site, as well as other sites where you included (if opened, those records will be read-only).

Site Types

PCR 8848

The Site Type field is new functionality that has been introduced in PM87 to facilitate implementation of multiple areas of law or business.

For example, your organization may have internal legal counsel, as well as corporate management. Both would like to be able to use Practice Manager. The simplify the implementation of each, and to prevent the mixing of records and settings, sites might be divided into Legal sites and Corporate sites, each with their own set of users and implementations. Users of legal sites won't have to view the records and settings of users or the corporate sites, and vice versa. It is possible, of course, to belong to sites of more than one site type.

In the future, this differentiation will also be used to distinguish the difference between work product sites and portal presentation sites, new functionality that is currently slated for an upcoming release of Practice Manager.

Menu and Toolbar Changes

There are 15 Menu- and Toolbar-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
7826, 9612 and 9635	Tools – MS Outlook This menu item is available only if MS Outlook is selected as the default e-mail program in System Settings and the **Outlook Access** operation has been assigned to the user's Functional Security Role. When clicked, Microsoft Outlook is started.	PM87
8256 and 8350	Tools – Windows Explorer This menu item is available only if the **Windows Explorer Access** operation has been assigned to the user's Functional Security Role. When clicked, Microsoft Windows Explorer is started. Tools – Internet Explorer This menu item is available only if the **Internet Explorer Access** operation has been assigned to the user's Functional Security Role. When clicked, Microsoft Internet Explorer is started. Note If you want to be able to launch a file manager from within a Citrix environment, you should use the Internet Explorer menu item instead of the Windows Explorer menu item. Internet Explorer can be used as a file manager, just as Windows Explorer, only it works better in a Citrix environment.	PM87

PCR	Description	In Version
8894, 9141, 9142, 9143, 9144, 9145, 9324, and 9592	In addition, Practice Manager has been updated to allow external integrations and modules to publish menu items that can appear on selected Practice Manager menus. Refer to the documentation provided with that integration or module for more information on the functionality associated with those menu items.	PM87
9114	A new toolbar button, Desktop, has been added to open the default PM Desktop View selected in Preferences – Views (see "View" beginning on page 2-17 and "PM Desktop Views" beginning on page 2-27).	PM87
9156	When GroupWise is the selected e-Mail client in System Settings, the New Phone Message option appears on the toolbar under either of the following conditions: When Show Titles on Toolbar is checked, the Phone Message option appears under the New button. When Show Titles on Toolbar is not checked, the New Phone Message icon appears on the toolbar between New Note and New Groupware Item.	PM87
9309	File – Open – Desktop This menu item opens the default PM Desktop View selected in Preferences – Views (see "View" beginning on page 2-17 and "PM Desktop Views" beginning on page 2-27).	PM87

Updated Asssign/Unassign Functionality

PCRs 8282, 8283, 8284, 8285, 8286, 8290, 8291, 8303, 8305, 8318, and 8319

On all assignment tabs, such as Related Entities or Matters, the functionality has been updated as follows:

Button	Definition
>	Assigns the highlighted records in the Available listing.
>>	Assigns all items in the Available listing.
<	Unassigns the highlighted records in the Assigned listing.
<<	Removes all items from the Assign listing.
Ctrl + A	Selects all records in the listing.

These listings respect the Max Rows value in System Settings; however, Assign All, Unassign All, and Select All ignore this setting and, in fact, select even records that are not displayed.

For example, you are working with Related Entities, and Max Rows is set to 300. The there are 1000 Available Entities and 600 Assigned Entities, but on both listing, only the first 300 appear.

- If you choose Select All on the Available Entities listing, you will be selecting all 1000 records, not just the 300 you can see.
- If you choose Select All on the Assign Entities listing, you will selecting all 600 records, not just the 300 you can see.
- If you choose Assign All (>>), all 1000 records will be assigned, not just the 300 you can see.
- If you choose Unassign All (<<), all 600 records will be unassigned, not just the 300 you can see.

If you filter either listing, "ALL" is considered to be the records that meet the filter requirements, not all records on the listing.

Preferences

There are 21 Preference-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

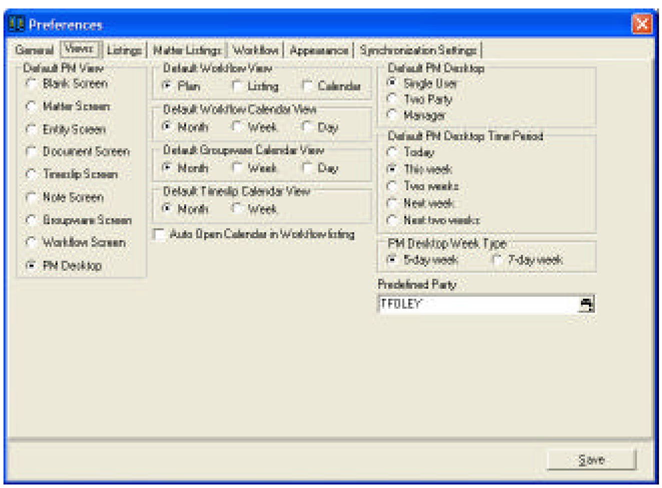
PCR	Description	In Version
6369, 9004, and 9017	New Workflow Preferences for controlling how plans open in matters (see page 2-18)	PM87
6866	On the workflow calendar, ticklers are now sorted by priority when Sort Tickler by Priority is checked.	PM87
6915	Use Intake Sheet is now disabled if the firm has not enabled the Intake Wizard in System Settings.	PM87
8839	The Save button is now available from all tabs in the Preferences window.	PM87
8844	New Appearance Preferences for Practice Manager (see page 2-19)	PM87
9115	View Preferences (see page 2-17) related to the new PM Desktop Views (see page 2-27).	PM87

PCR	Description	In Version
9156	When GroupWise is the selected e-Mail client in System Settings, the New Phone Message option appears on the toolbar under either of the following conditions: When Show Titles on Toolbar is checked, the Phone Message option appears under the New button. When Show Titles on Toolbar is not checked, the New Phone Message icon appears on the toolbar between New Note and New Groupware Item.	PM87

View Preferences

PCR 9115

To accommodate the new PM Desktop Views, several changes were made to the Views tab:



➢ Default PM View – PM Desktop

When selected, the new PM Desktop View appears when you first open Practice Manager. For more information, see "PM Desktop Views" beginning on page 2-27.

➢ Default PM Desktop (new section)

This determines what type of view is opened when the PM Desktop View is accessed. Which views are available depends on the permissions includes in your functional security role at the active site. For more information, see "PM Desktop Views" beginning on page 2-27.

- Default PM Desktop Time Period (new section)

  This determines what default time period is used when the PM Desktop View is accessed. For more information, see "PM Desktop Views" beginning on page 2-27.

- PM Desktop Week Type (new section)

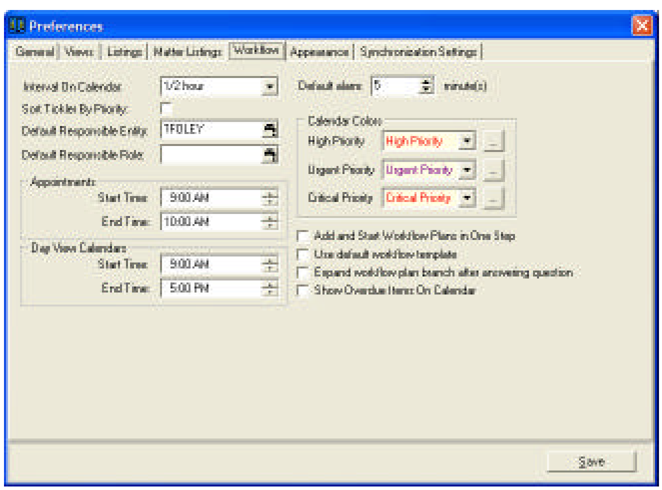
  This determines what type of week is used when the PM Desktop View is accessed. For more information, see "PM Desktop Views" beginning on page 2-27.

- Predefined Party

  For two-party views, this determines what the other default party on the PM Desktop View. For more information, see "PM Desktop Views" beginning on page 2-27.

Workflow Preferences

PCR 6369, 9004, and 9017



- The **Open all Branches of a workflow plan within a matter** field as been relabeled to **Expand workflow plan branch after answering question**, and the functionality has been changed as follows:

- When checked, answering a question causes the branch of items after the selected answer to be expanded automatically to the end, or the next question, whichever comes first.

- When not checked, the branch after the selected answer remains collapsed.

➢ A new option, Add and Start Workflow Plans in One Step, has been added.

- With this option checked, workflow plans added to a matter are automatically started. This is especially convenient if you are responsible for both inserting the plans and starting them. Keep in mind that starting a plan often takes much longer than inserting one, as Practice Manager has to scan through the plan to determine if any actions should be carried out.

- When this option not check, workflow plans are not started when they are added to a matter; instead, the starting process is carried out through a right-click menu item. This is especially convenient for those who are only responsible for inserting plans into a matter, and are not actually responsible for starting them.

Note

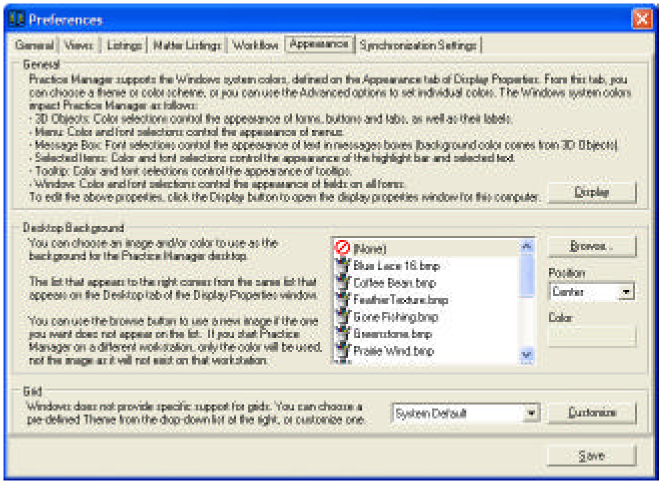
If the matter contains plans which have been added but not started, a dialog box appears when you open the matter, warning you that this condition exists.

Appearance Preferences

PCR 8844

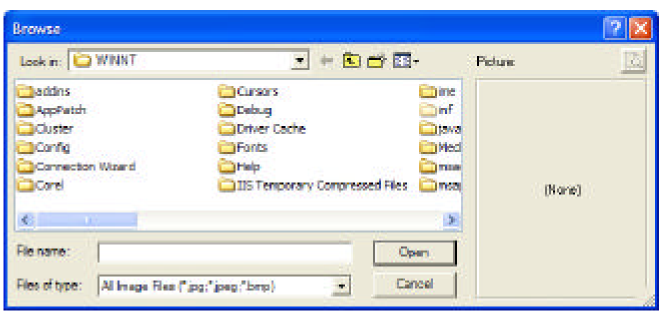
One "complaint" of Practice Manager users has always been its "grey" appearance. What most users didn't know was, with the exception of the listings, all Practice Manager elements used the standard Windows appearance settings. To make it easier for users to understand how Practice Manager uses these appearance settings, we have added an Appearance tab in preferences, which includes an explanation under the General section.

Clicking the Display button opens the Windows Display Properties window, where you can adjust the overall appearance of Windows and Practice Manager.



Desktop Background

In additional, we have added the ability to replace the standard Practice Manager background with an image. You can choose from one of the standard Windows Desktop Backgrounds, or you can click on the Browse button to select any Image file stored on your computer or network server.



Once you have selected an image, either from the list or by browsing, you can then choose to Center, Tile or Stretch it into Position.

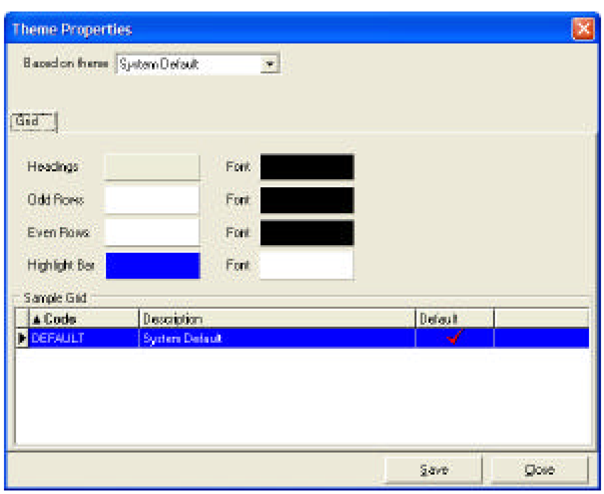
If you would rather just use a color, you can click on the color button and choose a color from the pop-up window.

Grids

As stated before, Practice Manager listings (A/K/A “Grids”) do not supporting the standard Microsoft Windows Appearance Settings. So that you can set the colors of the grids, we have included a feature that let’s you select from user-defined themes, or use your own custom colors.

Themes can be selected from the drop-down list in the Grid section. These themes are defined by your System Administrator on the Appearance tab in System Settings.

You can also choose to customize the grid properties by clicking on the Customize button, which opens the Theme Properties window.



You can then modify the Grid properties from this window:

- Choose colors for the Heading row background and text (Font).
- Choose colors for the Odd Row background and text (Font).
- Choose colors for the Even Row background and text (Font).
- Choose colors for the Highlight Bar background and selected text (Font).

A sample appears on the grid at the bottom of the form.

Click Save to apply the settings to all grids in Practice Manager, or Close to return to Practice Manager without saving the changes.

All listings in Practice Manager have been updated to respect the Grid settings from the Preferences – Appearance tab (PCRs 9136, 9137, 9138, and 9139).

A Note about Appearance Settings

The settings you select are saved in the Practice Manager database. This means that, if you log in to Practice Manager from another workstation, the settings – along with all other preferences – will be used on that workstation.

There is, of course, an exception. If you choose a Desktop Background image, and that image is stored on your workstation, it will not load when you log in from another workstation. That's because the second workstation cannot access the file.

Now, if the image is on a network server and the file location path to the image is the same for both workstations, then the image will be loaded from the server.

And even if the image doesn't load on another workstation, it will continue to load on your workstation the next time you log on to Practice Manager.

For organizations who want a standard background image used on all workstations, the best thing to do would be to put the image in the PMROOT folder, or an image subfolder within the PMROOT folder, and then have all users use that image.

PMRemote

There are 27 PMRemote-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
7740, 8494, 8557, and 8591	PMRemote now checks to see if the local installed version of Practice Manager is the same as the one your firm is running and, if not, provides you with the option of updating the local version.	PM87
8327	You can now skip downloading of document assembly components and information during the download process, as this typically uses a lot of local disk space, as well as takes a lot of time to carry out. Checking the Download document assembly components and files box will download these items from the server to the local computer. Leaving the Download document assembly components and files box blank will not download these items from the server to the local computer.	PM87
8827	You can now skip downloading of document files during the download process, as this typically uses a lot of local disk space, as well as takes a lot of time to carry out. Checking the Download document files for selected matters box will download these items from the server to the local computer. Leaving the Download document files for selected matters box blank will not download these items from the server to the local computer.	PM87
11383	PMRemote now downloads the entity address book in blocks so that it is possible to download it without error.	PM87 SP1
11795	PMRemote has been updated so that, during download, if NT Authentication is enabled on the application server, it is automatically switched to SQL Authentication in the local version of Practice Manager. This is so firms that have deployed Practice Manager using NT Authentication can allow users with Windows 98SE on their local workstations or laptops to use PMRemote.	PM87 SP1
13734 and 13827	PMRemote Download and Upload now allows you to select what kind of Authentication to use to connect to the remote database. • NT Authentication, which uses your network login credentials for accesing the database.	PM87 SP2A

PCR	Description	In Version
	• SQL Authentication, which requires you to enter a user name and password for logging into the remote SQL server. Note that this user must be a user setup in your SQL server, and is not necessarily your active user account in Practice Manager or your network user account, but is specifically a user created in SQL server. In most deployments, every effort is made to keep all these login credentials the same. The default selection is based on the Login option in System Settings. For SQL Authentication, the user name and password is not saved. This is for security purposes. You will need to enter this information each time.	
13859 and 13867	When you start the Download or Upload process, either from the menu item OR by clicking the Download Now or Upload Now buttons, PMRemote checks to make sure the remote database is the same version as the network database that you are downloading from or uploading to. If the versions are the same, no messages appear. If the versions are not the same, that is, the remote version is older than the network version, a dialog box appears advising you of this condition. You can proceed as follows: • Choose Update Now, which launches the PMRemote upgrade start page, allowing you to first upgrade your remote version of Practice Manager. Note that the Download/Upload window will close. You will need to start the Download/Upload process again from the File – PMRemote menu item. • Choose No, which allows you to select a different remote database. • Choose Cancel, which terminates the download/upload process.	PM87 SP2A
13998	The database link message has been changed 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." For PMRemote Download, it is necessary to be part of the sysadmin server role on the Target SQL Server because PMRemote needs to (1) link the two servers together, (2) need to be able to create logins on the Target SQL server,	PM87 SP2A

PCR	Description	In Version
	and (3) needs to be able to create users on the Target Database. For PMRemote Upload, it is necessary to be part of the sysadmin server role on the Source SQL Server because PMRemote needs to link the two servers together.	

Palm Integration

There are 36 Palm Integration-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
7724 and 8520	Palm integration respects Site and Matter Security implementation for Entity and Workflow records.	PM87
7725	Records are imported from Palm into the user’s active site, determined at Login.	PM87
7752	Unscheduled workflow items in Practice Manager are exported to Palm as un-timed events, and vice versa.	PM87
7753	Palm synchronization options have been updated to use “Synchronize all Workflow items where I'm assigned” and not just the responsible entity.	PM87
7808, 7818 and 8523	Palm now synchronizes Court Events as Date Items, and Phone Calls and Critical Dates as To Do Items. Palm Date Items are synchronized as Practice Manager appointments, and Palm To Do Items are synchronized as Practice Manager tasks.	PM87
8525	Entity and Workflow listings are now refreshed after synchronizing with Palm if Auto-refresh Listings is enabled.	PM87
8702	Palm synchronization now respects international date formatting.	PM87
12144 and 12220	Practice Manager must be running in order to use Palm Sync.	PM87 SP1

Additional Support for Third-party Applications

There are 24 PCRs addressed for third-party application in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
8279	Microsoft Word XP is now an available Engine for document assembly design and merging.	PM87
8298	Textbridge Millennium Edition	PM87
8559	In addition, the timeslip export module is no longer internal to Practice Manager. Instead, it has been turned into a separate product, allowing for the release of new export formats without the need to update Practice Manager. If your firm needs an export format that is currently not supported by Practice Manager, you should contact your RealLegal account manager.	PM87
8930	Juris – Note that this is the same integration that was added in Practice Manager version 8.0	PM87
12605, 12624, 12640, 12641, 12642, 12643, 12645, 12646, 12647, 12648, 12650, 12746, 12890	The release of Practice Manager has been certified for use with LegalVision v11.	PM87 SP2
12986	The RightFax select entity listing has been updated to support type-searching and sorting.	PM87 SP2

PM Desktop Views

PCRs 8524, 9114, 9115, 9116, 9117, 9118, 9119, 9309, 9365, 9367, and 9368, 9371, 9373, 9382, 9384, 9448, 9485, 9527, 9558, 9811 and 12294

New in PM87 are PM Desktop Views. There are three views which provide different “snap shots” of the information in Practice Manager as it relates to your work. The objective is to give you a quick place to go where you can view all that needs to be done, as well as all you have worked on, in a given time period. These views also provide a quick way of accessing those records – simply click on the description, just as you would any hypertext link on a Web site, and the record or list of records corresponding to the Desktop View entry opens.

There are a total of 50 Desktop View-related PCRs addressed in these releases of Practice Manager.

System Settings

Desktop Views are a firm-wide option with respect to enabling and disabling. This was implemented as follows:

A new option – Enabled Desktop Views – has been added to the Global Settings option group on the System Settings:General tab.

When enabled:

- The “Open Desktop Views” security is available for assignment.
- The “Desktop View” toolbar icon appears.
- The "File-Open-Desktop" menu item appears.
- The Preferences-Views-Default PM View-PM Desktop option appears.
- The Preferences- Views-Default PM Desktop group appears.
- The Preferences-Views-Default PM Desktop Time Period group appears.
- The Preferences-Views-Default PM Desktop Week Type group appears.
- The Preferences-Views-Predefined Party appears.
- Tracking of items worked on is activated.

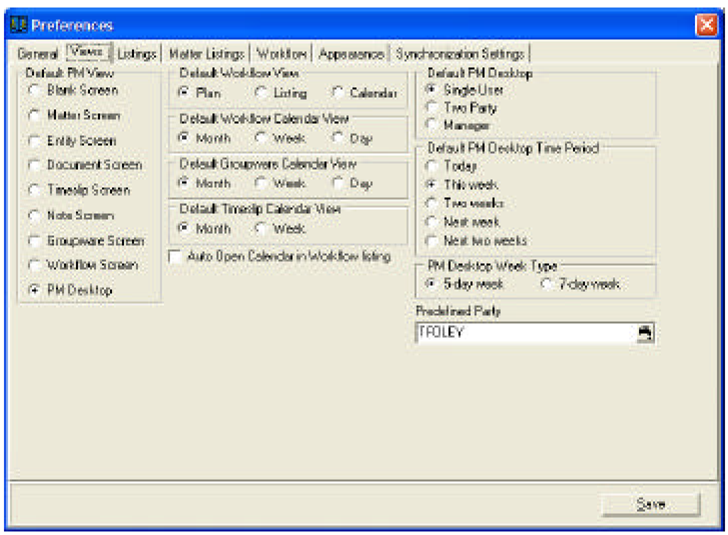
If you are using Desktop Views and then disable them, the above items will be deactivated, and previous history tracking will be cleared.

Enabling Desktop Views begins historical tracking on the day that the views are enabled, which means items worked on prior to the time of enabling the option will not be included in listings, counts and links.

A new option, Max Items in Desktop Sections, has been added to limit the number of items that can appear in each section of the new PM Desktop Views (see "PM Desktop Views" beginning on page 2-27).

Configuring the Desktop Views

All configuration is done through the View tab in Edit – Preferences.



For more information, see "View Preferences" beginning on page 2-17.

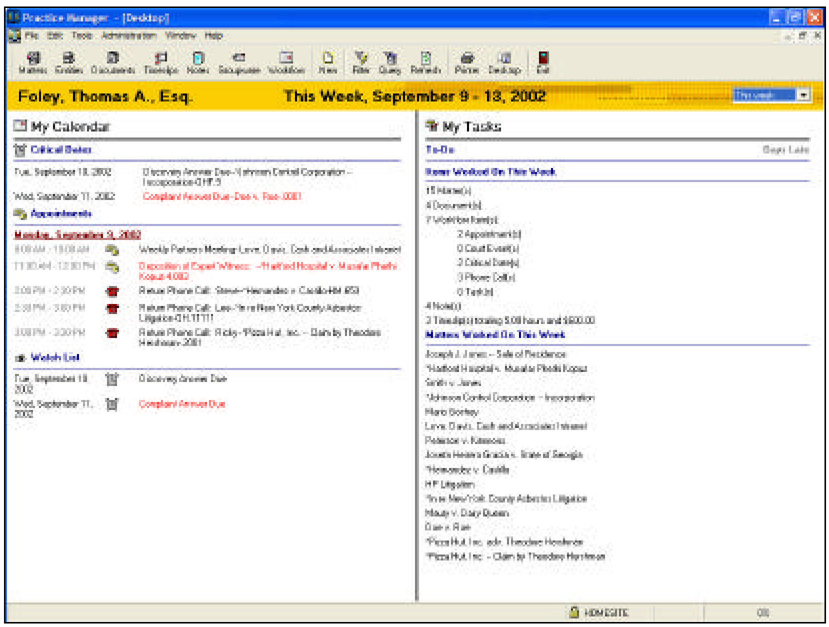
Understanding the Desktop Views

Types of Desktop Views

There are three Desktop Views. Which view you have access to is determined by the functionality security role assignment at the Active Site.

- Single User

  This view is intended to give a single user a "snapshot" of their upcoming and completed work.



The banner at the top of the window identifies you based on your active login. It also indicates the time range for which the view is current. You can change the view range by selecting a different value from the drop-down list located on the right side of the banner:

View	Definition
Today	Shows all items for today. If today is Monday, September 9, the values shown would be for that same day.
This week	Shows all items for this week. If today is Monday, September 9, the days covered would be September 9 through 13.

View	Definition
Two weeks	Shows all items that are this week and next week. If today is Monday, September 9, the days covered would be September 9 through 20.
Next week	Shows all items that are for next week. If today is Monday, September 9, the days covered would be September 16 through 20.
Next two weeks	Shows all items that are for next week. If today is Monday, September 9, the days covered would be September 16 through 27.

The window is divided into two panels:

1 The left panel is a snapshot of your calendar for the selected range:

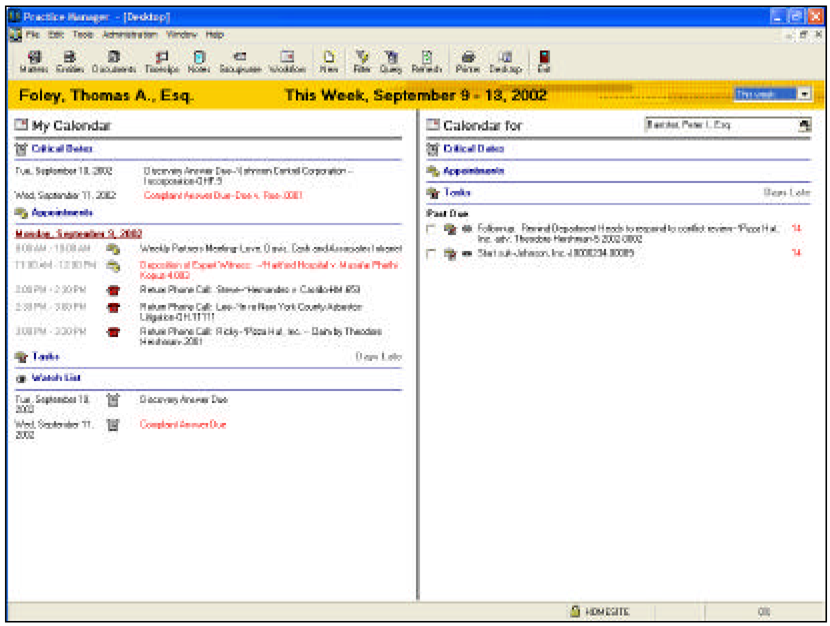
- Critical Dates are listed first
- Appointments are listed second
- A Watch List, items where the Tickler dates have been achieved, are listed last
- Workflow items that are marked complete or cancelled are not included on these listings.

2 The right panel lists completed and upcoming tasks:

- To Do are tasks that are current due
- Items worked on [period] lists each Practice Manager record type with counts next to each, indicating how many of each you have worked on in the selected period.
- Matters work on [period] lists all Practice Manager matter records you have accessed or created records for in the selected period.

- Two Party

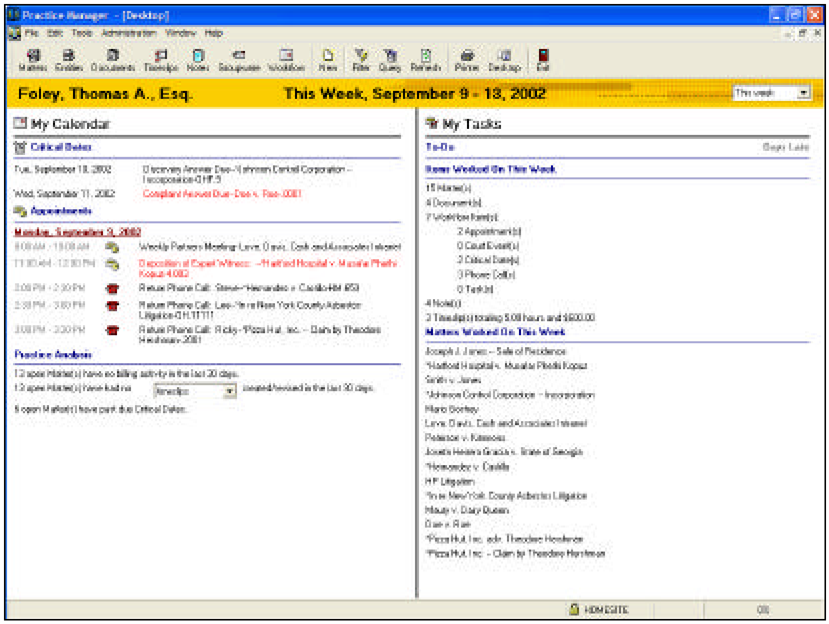
The Two Party view allows you to see the calendar for two entities: yourself and another selected Staff member. This view is particular convenient if you are attempting to schedule an appointment or task for someone, or you need to compare the workload of another staff member with your own for task loading.



The Calendar for field is pre-populated with the Value from the Predefined Party field on Preferences – Views. To change the party, simply choose a different party from the drop-down list.

- Manager

The Manager View is the same as the Single User View, only it adds a Practice Analysis Section.



The Practice Analysis section reviews all records in Practice Manager and provides counts for the following:

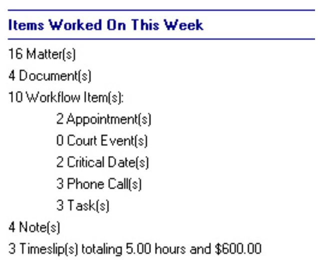
- A count of matters that have had no billing activity in the last 30 days.
- A count of matters that have had no activity – that is, certain types of records from a select list – have not been created or revised for a matter in the last 30 days.
- A count of matters that have past due Critical Dates.

Working with the Desktop View

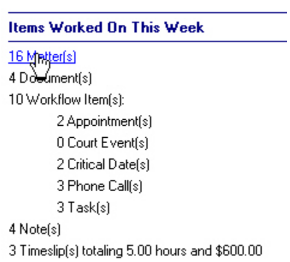
While the desktop views provide a nice snapshot of your calendar and tasks, as well as some nice statistical analysis, the "power" comes from the fact that all items are actually hyper-links into Practice Manager records and listings.

When you move the mouse point over an item, notice that the mouse pointer changes shape, and the text color and becomes underlined:

➢ Before…



➢ After…



When you click on the link, one of two things will happen, depending on the type of link:

➢ If the item references a specific record in Practice Manager, such as a workflow item or matter, that record is opened.

➢ If the item references a count of records in Practice Manager, such as the number of matters work on this week, the appropriate listing appears with the records matching the count displayed. In the above example, the 16 matters that were worked on this week would be listed.

This provides a quick and easy way to access the records you have recently worked on in Practice Manager.

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Matters

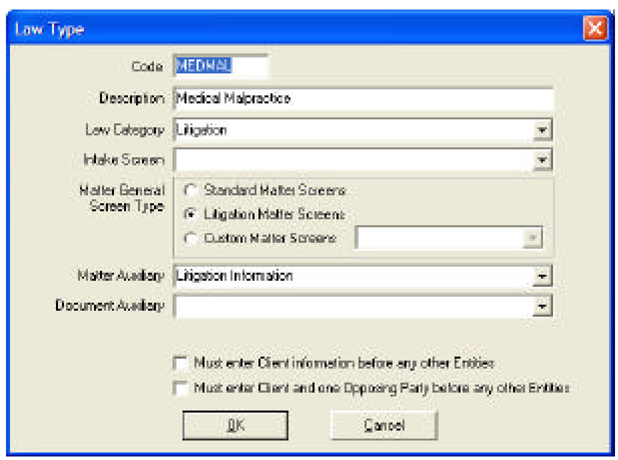
Summary of Changes to the Matters

There are 288 Matter-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
4026	Show History View has been change to Timeline to allow more space for other filter fields.	PM87
4741	All Address windows now auto-refresh for entities on the Litigation Matter forms.	PM87
4746	The grid on the Matter-Overview-Negations listing now supports sorting.	PM87
5973	The first column of the assign window, opened from the Matter TreeView, is now in focus to simplify type search on the Name/Description column.	PM87
6834 and 9328	Law Type now requires a Code. For versions of Practice Manager where there was no Code field, a conversion program has been included in the upgrade to create a unique set of Law Codes based on the Law Category of the Law Type (see . Once populated by the upgrade program, the values in Code fields can be changed as needed.	PM87
6950, 6952 and 6953	For litigation matters, the Related tabs for all entities on the Overview, Plaintiff and Defendant tabs have been updated to support 800 x 600 resolution.	PM87
7453, 9129, 9622, and 9659	Matter auxiliaries now respect site security based on the site of the parent matter record. • If the Active Site is the same site as the matter, the user can view and edit the auxiliary information from the listing or the matter data entry form.	PM87

PCR	Description	In Version
	• If the Active Site is not the same site as the matter but the user is included in that matter site, the user can view the auxiliary information from the listing or the matter data entry form. • If the Active Site is not the same site as the matter and the user is excluded from that matter site, the user cannot edit or view the auxiliary information from the listing.	
7458	Matter TreeView now auto-refreshes, if enabled, when notes or documents are added.	PM87
7470	In the Plaintiff-Guardian/Estate data entry form, checking the box Is Contact automatically add the entity as an Entity Contact and a Matter-specific Entity Contact for the selected Plaintiff.	PM87
7679	Auxiliary fields are now auto-refreshed on the matter listing if that option is selected.	PM87
7844	Adding an issue through the Related tab for an entity in a litigation matter relates that issue to both the entity and the matter.	PM87
8152, 8159, and 8160	Creating a new record from the Matter TreeView now respects selecting of record templates if Use templates is selected in Preferences.	PM87
8262	The Time of Incident field does not appear on the litigation Matter – Overview – Incidents/Facts forms until a Date of Incident is entered.	PM87
8282	Matter Security tab respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8512	Timeslips now pass the time from the timer, even if it has been paused, regardless of how long the matter record has been opened.	PM87
8529	Matter Listing respects new All Filter/Query Access Functional Security Option.	PM87
8581	The size of the following fields have been increased so that can contain more characters: • Litigation Matter -> Defendant -> Cars -> Comments • Litigation Matter -> Defendant -> Role Details • Litigation Matter -> Overview -> Billing -> File Disposition • Litigation Matter -> Overview -> Billing -> File Disposition-> Comments	PM87

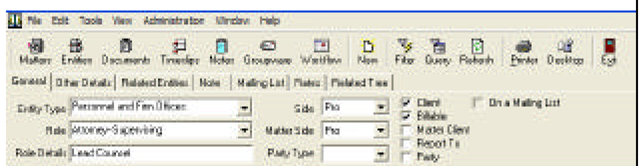
PCR	Description	In Version
	• Litigation Matter -> Overview -> Billing -> Overview -> Audit Criteria • Litigation Matter -> Overview -> Billing -> Overview -> Payment Information • Litigation Matter -> Overview -> Negotiations -> Special Damages • Litigation Matter -> Overview -> Source • Litigation Matter -> Plaintiff -> Cars -> Comments • Litigation Matter -> Plaintiff -> Employment -> Lost Wages -> Comments • Litigation Matter -> Plaintiff -> Liens -> Comments • Litigation Matter -> Plaintiff -> Liens -> Denial -> Comments • Litigation Matter -> Plaintiff -> Medicals -> Treatment • Litigation Matter -> Plaintiff -> No Fault Submission & Denial -> Comments • Litigation Matter -> Plaintiff -> Role Details • Litigation Matter -> Plaintiff -> School -> Special Activities field • Litigation Matter -> Plaintiff -> Special Damages -> Comments • Litigation Matter -> Source -> Source Data Entry-> Comments	
8582	The Plaintiff-Award-Payment data entry form no longer requires a Defendant Attorney Firm and an Insurance Carrier in order to save the record, as many times settlement is made without a defendant attorney or insurance carrier.	PM87
8620	Matter TreeView and Litigation Related Trees respect new All Filter/Query Access Functional Security Option.	PM87
8710	The matter timer can now be paused on any matter tab.	PM87
9102	If matter numbers are generated in interactive mode (i.e., there is a Next button next to the matter number field), the button is enabled, regardless of whether or not the user has functional security permission to create matter numbers.	PM87

PCR	Description	In Version
	If matter numbers are generated in automatic mode (i.e., the field is populated by the system when a matter is created), the field is populated automatically, regardless of whether or not the user has functional security permission to create matter numbers. The matter number field only respects Create Matter Number functional security permission when matter numbers are generated manually. If the user does not have permission to create matter numbers, they cannot enter a value in this field if it is empty. This applies, even if the user is creating a new matter or editing an existing matter.	
9108	Hard returns in the Long Matter Name now appear as spaces in the Long Matter Name field on listings.	PM87
9196	In Matter TreeView, Entity Relationships to Show only appears when the Entity branch is selected.	PM87
9326	The Matter General Screen Type Section has been updated as follows:  • Standard Matter Screens – These are the screens currently in version Practice Manager PM80 and higher. • Litigation Matter Screens – These are the new set of matter information screens added in PM85. • Custom Matter Screens – This allows you to select from any existing custom matter screens that have been added to Practice Manager through Auxiliary Settings.	PM87
9424	Matter TreeView now respects the Disable Save Grid Layout in System Settings.	PM87

PCR	Description	In Version
9461	The Status Age field on the Overview – General form of Litigation Matters now updates when you type a date in the Status Date field, not just when you select a value from the calendar.	PM87
9496	The Matter Search Name has been added to the “Do you want to create a timeslip” dialog box that appears when you close a matter with Generate timeslips in matter selected in Preferences. This was done because, if you exit Practice Manager with multiple matters open, you will get multiple prompts. In previous versions of Practice Manager, there was no indicator as to which matter you were being prompted to create timeslips for. Now you will be able to tell which matters you are being prompted for, and can decided whether you need to create a timeslip for that matter or not before leaving Practice Manager.	PM87
9565	The Generate timeslip in matter Preference now supports custom Practice Manager date entry forms.	PM87
10020	Add multi-select functionality to the Matter Listing. • To select matters in a non-contiguous block, click on the first matter you want to select, then press and hold the Control key, and continue clicking on matters until you have highlighted all matters you want to select. To unselect records in that block, click on the record again while holding down the Control Key.. • To select matters in a contiguous clock, click on the first or last matter in the block you want to select, then press and hold the Shift key, and click on the last or first matter in the block you want to select. All matters in that block are highlighted. Please note that the Open, Delete, and Auxiliary functions are not available when more than one matter is selected. The reason multi-select was added to the matter listing was to support integrations and modules that can take advantage of selecting more than one matter at a time.	PM87
Multiple	General updates to the Matter Listing (see "Changes to Matter Listing – Available Columns" beginning on page 3-10).	PM87
Multiple	General updates to the Matter Listing Query (see "Changes to Matter Listing – Query Fields" beginning on page 3-11)	PM87

PCR	Description	In Version
Multiple	Populating the Client/Billable field has been updated for consistency and data integrity (see "Updates for Client/Billable Field Values" beginning on page 3-13)	PM87
4655	When the Matter Listing quick filter is set to ALL for Status, unselecting ALL advances the cursor to the Status look-up field.	PM87 SP1
11170	Client Phone has been added to the Matter Listing as an available field.	PM87 SP1
11355	The Matter OCX form data can now be printed.	PM87 SP1
11561	Multi-select on the Matter Listing now supports delete functionality as follows: • Select one or more records on of the listing, and choose Delete. • The Delete Confirmation message appears • Click No to keep the selected record(s) or Yes to proceed with deleting the selected record(s). The system then begins deleting items. When a condition exists that does not allow the record to be deleted, the appropriate message appears once. The answer is then applied to all like conditions. For example, if the record is from another site other than your active site, a message appears advising you that you cannot delete records from that site. This message only appears once during the delete operation, and not each time a record is encountered. • When complete, the listing refreshes if Auto refresh is enabled.	PM87 SP1
11699	The Matter TreeView has been updated as follows: Matter branch • Uses the global matter listing filter form. • Default for the filter is read from Preferences – Listings – Matter. • Preferences – Listings – Matters – Undefined uses the same defaults as the global matter listing. Entity branch • Uses the matter-entity listing filter form. • Default for the filter is read from Preferences – Matter Listings – Entity. • Preferences – Matter Listings – Documents – Undefined uses the same defaults as the matter-entity listing.	PM87 SP1

PCR	Description	In Version
	<u>Document branch</u> • Uses the matter-document listing filter form. • Default for the filter is read from Preferences – Matter Listings – Documents. • Preferences – Matter Listings – Documents – Undefined uses the same defaults as the matter-document listing, including ALL for Author. <u>Timeslip</u> • Uses the matter-timeslips listing filter form. • Default for the filter is read from Preferences – Matter Listings – Timeslips. • Preferences – Matter Listings – Timeslips – Undefined uses the same defaults as the matter-timeslip listing, including ALL for Timekeeper. <u>Note</u> • Uses the matter-note listing filter form. • Default for the filter is read from Preferences – Matter Listings – Notes. • Preferences – Matter Listings – Notes – Undefined uses the same defaults as the matter-note listing, including ALL for Author. <u>Groupware</u> • Uses the matter-groupware listing filter form. • Default for the filter is read from Preferences – Matter Listings – Groupware. • Preferences – Matter Listings – Groupware – Undefined uses the same defaults as the matter-groupware listing, including ALL for Sender. <u>Issues</u> • Does not have a filter. • The filter button is disabled. • The default listing should be the same as the Matter-Issue listing.	

PCR	Description	In Version
	<u>Workflow</u> • Uses the matter-workflow listing filter form. • Default for the filter is read from Preferences – Matter Listings – Workflow. • Preferences – Matter Listings – Workflow – Undefined uses the same defaults as the matter-workflow listing, including ALL for Staff.	
11710	The set of fields at the top of the Entity – General data entry form has been updated to include the Matter Client field from the assignment window.  The full set of fields is as follows: • Entity Type – The type selected when the entity was first created. • Role – The role selected when the entity was assigned to the matter. This value can be changed. The list of available roles excludes those already used for the entity in the selected matter. • Role Details – These are the role details entered for the entity when the entity was assigned to the matter. • Side – This is the entity's firm-level side. • Matter Side – This is the entity's matter-level side. • Party Type – If the entity is a party in the matter, this is the party type. • Client – This indicates whether the entity is a client at the firm-level. • Billable – This indicates whether the entity is billable for services rendered. • Matter Client – This indicates whether the entity is a client in the matter. • Report To – This indicates that reports for the matter should be submitted to this entity. • Party – This indicates the entity is a party in the matter. Select the Party Type in the corresponding field.	PM87 SP1

<table>
<tr><th>PCR</th><th>Description</th><th>In Version</th></tr>
<tr><td>12275</td><td>There are two settings in Practice Manager for matter intake – Enable Intake Wizard in System Settings and Use Intake Sheet in Preferences. These are applied as follows:

<u>Enable Intake Wizard and Use Intake Sheet are checked</u>
• Create new matter. Intake wizard opens.
• Select a Law Type.
• An form opens in the panel below the Law Type field if a matter-specific intake form is assigned.
• Click OK. The appropriate matter information forms appear for the selected law type.

<u>Enable Intake Wizard is checked but Use Intake Sheet is not checked</u>
• Create new matter. Intake wizard opens.
• Select a Law Type.
• An form opens in the panel below the Law Type field if a matter-specific intake form is assigned.
• Click OK. The appropriate matter information forms appear for the selected law type.

<u>Enable Intake Wizard is not checked but Use Intake Sheet is checked</u>
• Choose create new matter. Practice Manager checks to see if an IntSheet.exe file exists.
• If yes, the intake sheet is opened.
• If no, a message displays. Clicking OK opens the standard matter information forms. Clicking Cancel terminates creating the matter.

<u>Enable Intake Wizard and Use Intake Sheet are not checked</u>
• Choose create new matter. The standard matter information forms appear.</td><td>PM87 SP1</td></tr>
<tr><td>13918</td><td>Jurisdiction Code has been added to the Matter Listing as an available column</td><td>PM87 SP2A</td></tr>
</table>

Changes to Matter Listing – Available Columns

PCR 7260, 8682, and 13918

The following fields were added to the Matter Listing as available fields.

Field Label	Data Source
Jurisdiction Code	This is the Code from the Jurisdiction form.
Jurisdiction Court	This is the Court (entity name) from the Jurisdiction form.
Last Reviewed By	This is the entity name of the last user to review the matter record.
Law Type Code	This is the Code of the Law Type selected for the matter.
Location Of Incident: City	This is the City from the Location of Incident field group on the Matter – Overview – Incident/Facts page (litigation matters only).
Location Of Incident: State	This is the State from the Location of Incident field group on the Matter – Overview – Incident/Facts page (litigation matters only).
Matter Type Code	This is the Code of the Matter Type selected for the matter.
Site Type Code	This is the Code of the Site Type associated with the Site where the matter record was created.
Site Type Description	This is the Description of the Site Type associated with the Site where the matter record was created.
Record ID	This is the ID for the matter record.

The following fields were renamed on the list of Available Fields for the Matter Listing:

Original Field Label	New Field Label
Case Group 1	Matter Group 1
Case Group 1 Date	Matter Group 1 Date
Case Group 2	Matter Group 2
Case Group 2 Date	Matter Group 2 Date
Case Group 3	Matter Group 3
Case Group 3 Date	Matter Group 3 Date
Matter	Record ID

Note

Client Phone No. was inadvertently removed from the list of Available Fields for the Matter Listing. It will be added back in Service Pack 1.

Changes to Matter Listing – Query Fields

PCR 7260, 8682

The following fields were added to the Matter Listing Query as available field on which to search.

Field Label	Data Source
Creator Code	This is the entity code of the user who created the matter.
Creator Name	Entity Name of the last user to review the matter.
Jurisdiction City	This is the City from the Jurisdiction form.
Jurisdiction Code	This is the Code from the Jurisdiction form.
Jurisdiction County	This is from the County from the Jurisdiction form.
Jurisdiction Court	This is the Court (entity name) from the Jurisdiction form.
Jurisdiction State	This is from the State from the Jurisdiction form.
Last Review By Code	Entity Code of the last user to review the matter.
Last Update By Code	Entity Name of the last user to update the matter.
Law Type Code	This is the Code of the Law Type selected for the matter.
Location Of Incident: City	This is the City from the Location of Incident field group on the Matter – Overview – Incident/Facts page (litigation matters only).
Location Of Incident: Country	This is the Country from the Location of Incident field group on the Matter – Overview – Incident/Facts page (litigation matters only).
Location Of Incident: County	This is the County from the Location of Incident field group on the Matter – Overview – Incident/Facts page (litigation matters only).
Location Of Incident: State	This is the State from the Location of Incident field group on the Matter – Overview – Incident/Facts page (litigation matters only).
Location Of Incident: Street	This is the Street from the Location of Incident field group on the Matter – Overview – Incident/Facts page (litigation matters only).

Field Label	Data Source
Location Of Incident: Zip	This is the Zip from the Location of Incident field group on the Matter – Overview – Incident/Facts page (litigation matters only).
Matter Type Code	This is the Code of the Matter Type selected for the matter.
Reviser Code	This is the entity code of the user who last revised the matter record.
Reviser Name	This is the entity name of the user who last revised the matter record.
Site Type Code	This is the Code of the Site Type associated with the Site where the matter record was created.
Site Type Description	This is the Description of the Site Type associated with the Site where the matter record was created.
User Defined Date1	This is User Defined Date 1 field from the Matter – Overview – Incident/Facts page (litigation matters only).
User Defined Date2	This is User Defined Date 2 field from the Matter – Overview – Incident/Facts page (litigation matters only).

The following fields were renamed in the Matter Listing Query as available field on which to search:

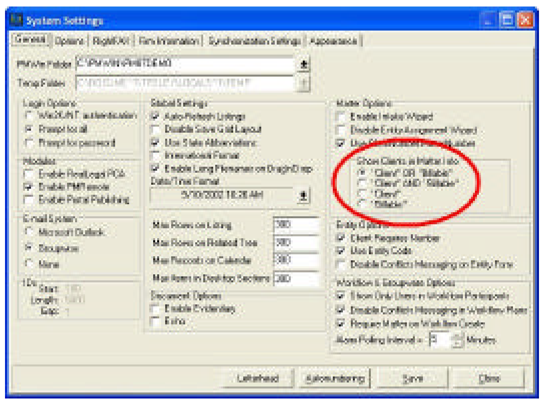
Original Field Label	New Field Label
Case Group 1	Matter Group 1
Case Group 1 Date	Matter Group 1 Date
Case Group 2	Matter Group 2
Case Group 2 Date	Matter Group 2 Date
Case Group 3	Matter Group 3
Case Group 3 Date	Matter Group 3 Date
Matter	Record ID

Updates for Client/Billable Field Values

PCRs 6421, 7653, 8478, 8479, and 8940

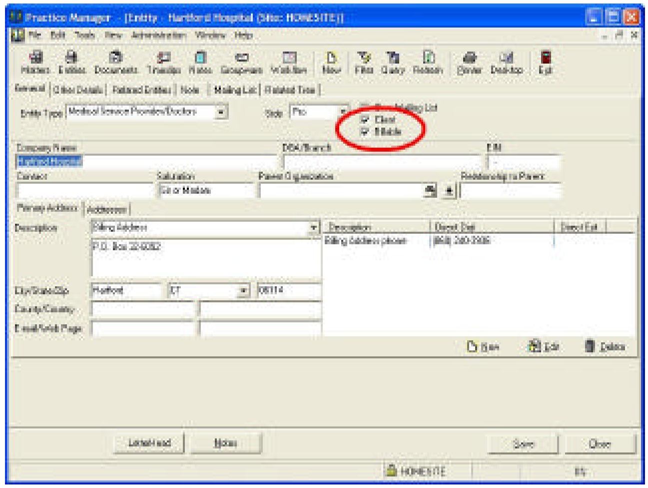
The entities that can be used in the Client/Billable field in a matter are determined by a setting in System Settings, and the options selected in the Client Entity Record.

- In system settings, there are four options for the Client/Billable field:



Option	Definition
Client OR Billable	This means that entities that have either the Client, Billable, or both fields checked in their entity record can be used in the Client/Billable field in a matter.
Client AND Billable	This means that only entities with both the Client and Billable fields checked in their entity record can be used in the Client/Billable field in a matter.
Client	This means that entities that have the Client field checked in their entity record can be used in the Client/Billable field in a matter, regardless of whether or not the Billable field is also checked.
Billable	This means that entities that have the Billable field checked in their entity record can be used in the Client/Billable field in a matter, regardless of whether or not the Billable field is also checked.

➢ On the Entity – General tab, there are two check boxes that determine whether an entity can appear in the Client/Billable field:



Option	Definition
Client	If this field is checked, the entity can be used in the Client/Billable field for a matter under the following conditions: • Client OR Billable is selected in System Settings • Client AND Billable is selected in System Settings, and the Billable field is also checked in the entity record • Client is selected in System Settings.
Billable	If this field is checked, the entity can be used in the Client/Billable field for a matter under the following conditions: • Client OR Billable is selected in System Settings • Client AND Billable is selected in System Settings, and the Client field is also checked in the entity record • Billable is selected in System Settings.

Confusions sometimes occurs if the value in System Settings is changed. Sometimes, a change in this value can cause the values in the Client/Billable field to no longer be valid for that field.

For example, if Client was originally selected and lots of matters were created with Clients populating the Client/Billable field, and then the setting was changed to Billable, only Client entities that also had the Billable checked are now valid to be used in this field.

The impact would be as following:

- If you open a matter after the setting is changed to Billable, and the entity populating the Client/Billable field does, in fact, have both the Client and Billable fields checked, the entity will continue to be selected and populate the Client/Billable field.
- If you open a matter after the setting is changed Billable, and the entity populating the Client/Billable field only has the Client field checked, the entity will no longer populate the Client/Billable field because they don't have the Billable field checked.

Changing the System Setting in any of the following combinations will have a similar result as the above example:

If this is the Change in System Settings…	Impact on Existing Values in the Client/Billable Field..
Client OR Billable => Client AND Billable	• If the entity only had the Client field checked, they will no longer be a valid selection. • If the entity only had the Billable field checked, they will no longer be a valid selection. • If the entity had both the Client and Billable field checked, they will continue be a valid selection.
Client OR Billable => Billable	• If the entity only had the Client field checked, they will no longer be a valid selection. • If the entity had the Billable field checked, they will continue be a valid selection.
Client OR Billable => Client	• If the entity only had the Billable field checked, they will no longer be a valid selection. • If the entity had the Client field checked, they will continue be a valid selection.
Client AND Billable => Client OR Billable	All selected entities continue to be valid selections.
Client AND Billable => Billable	All selected entities continue to be valid selections.
Client AND Billable => Client	All selected entities continue to be valid selections.
Billable => Client OR Billable	All selected entities continue to be valid selections.
Billable => Client AND Billable	• If the entity only had the Billable field checked, they will no longer be a valid selection. • If the entity had both the Client and Billable field checked, they will continue be a valid selection.

If this is the Change in System Settings…	Impact on Existing Values in the Client/Billable Field..
Billable => Client	• If the entity only had the Billable field checked, they will no longer be a valid selection. • If the entity had both the Client and Billable field checked, they will continue be a valid selection.
Client => Client OR Billable	All selected entities continue to be valid selections.
Client => Client AND Billable	• If the entity only had the Client field checked, they will no longer be a valid selection. • If the entity had both the Client and Billable field checked, they will continue be a valid selection.
Client => Billable	• If the entity only had the Client field checked, they will no longer be a valid selection. • If the entity had both the Client and Billable field checked, they will continue be a valid selection.

With this release of Practice Manager, there is an automatic update that can be run by your System Administrator when the value in System Settings are changed. The update logic is based on the following:

If this is the Change in System Settings…	This is the Update on the Entity Records Selected Entities for the Client/Billable Field…
Client OR Billable => Client AND Billable	• If the entity only had the Client field checked, the update can also go through and check the Billable field so existing selections are still valid. • If the entity only had the Billable field checked, the update can also go through and check the Client field so existing selections are still valid.
Client OR Billable => Billable	If the entity only had the Client field checked, the update can also go through and check the Billable field so existing selections are still valid.
Client OR Billable => Client	If the entity only had the Billable field checked, the update can also go through and check the Client field so existing selections are still valid.
Client AND Billable => Client OR Billable	No update is required.
Client AND Billable => Billable	No update is required.
Client AND Billable => Client	No update is required.

If this is the Change in System Settings…	This is the Update on the Entity Records Selected Entities for the Client/Billable Field…
Billable => Client OR Billable	No update is required.
Billable => Client AND Billable	If the entity only had the Billable field checked, the update can also go through and check the Client field so existing selections are still valid.
Billable => Client	If the entity only had the Billable field checked, the update can also go through and check the Client field so existing selections are still valid.
Client => Client OR Billable	No update is required.
Client => Client AND Billable	If the entity only had the Client field checked, the update can also go through and check the Billable field so existing selections are still valid.
Client => Billable	If the entity only had the Client field checked, the update can also go through and check the Billable field so existing selections are still valid.

Please keep in mind that this change only occurs if the System Administrator chooses to carry out the update because the firm decides to do this. If the firm does not choose to update the existing entity selections in the Client/Billable field, there are two possible courses of action you, as a user, can carry out to make sure the selections in the Client/Billable field are valid:

1. Open the record of selected entity from the Client/Billable field, and manually check the box that will now make the entity valid for the field based on the value selected in System Settings.

2. Choose a different entity that is now valid for the field based on the value selected in System Settings.

In addition, the Select Entities window for the Client/Billable field has been updated to only support the rule selected in System Settings, and cannot be overwritten.

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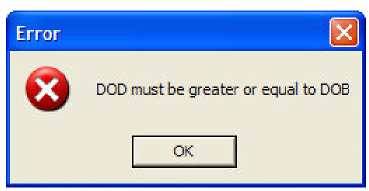
Chapter

4

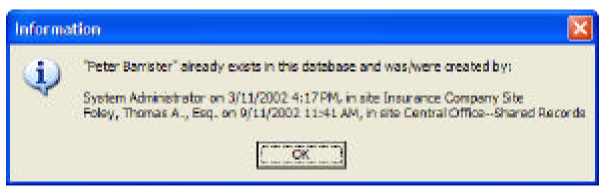
Entities

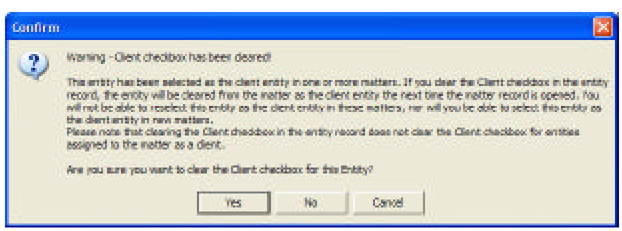
Summary of Entity Changes

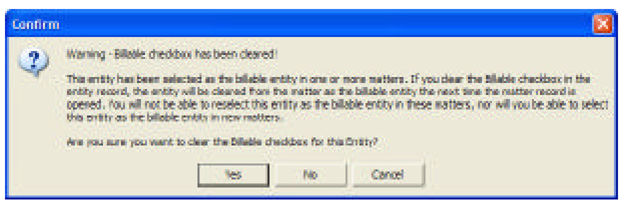
There are 186 Entity-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
3781, 8048, 8228, 8682, and 8923	The list of Available Fields for the Entity Listing Query has been updated (see "Changes to the Query Fields for the Entity Listing" beginning on page 4-15).	PM87
6049	On saving an entity record, Practice Manager checks to make sure the Date of Death is later than the Date of Birth. If it is not, a warning appears.  Clicking OK returns the user to the Other details tab, where they can correct either the Date of Birth or Date of Death value.	PM87
6191	Copying and pasting now respects field masks on the entity data entry forms.	PM87
7205	Creating a client security has been updated so that, if Client Requires Number is select in System Settings and the user does not have Create Client Number in their security role for the active site, the Client checkbox is disabled so they user can't check it and create a client.	PM87
7353	On the global entity listing, you can now preview the auxiliary information from the auxiliary assigned to the entity type, as well as the individual/organization auxiliary. In previous versions of Practice Manager, you could only preview the information from the entity type auxiliary. On the matter-entity listing, you can now preview the	PM87

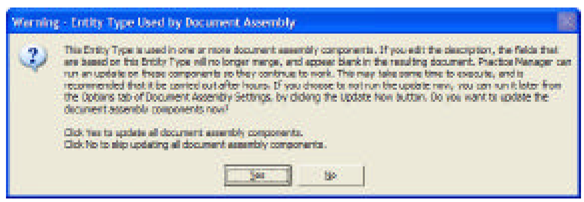
PCR	Description	In Version
	auxiliary information from the auxiliary assigned to the entity type and the entity role, as well as the individual/organization auxiliary. In previous versions of Practice Manager, you could only preview the information from the entity role auxiliary.	
7454, 9413, and 9658	Entity auxiliaries now respect site security in the same way it is respected by the parent entity record.	PM87
7507	Entity auxiliary fields are now auto-refreshed in the entity listing if Auto-Refresh Listings is selected in System Settings.	PM87
7652	The mask for the SSN/EIN field has been updated as follows: • If the entity is an individual, the mask is ## – ### – #####. • If the entity is an organization, the mask is ## – ########. • If International Format is checked in System Settings, there is no mask. Keep in mind that, if the field is empty, pressing Ctrl+F in the field removes the mask.	PM87
7730	Spaces can no longer be used as the only value in a required field.	PM87
8048, 8226, 8682, and 9443	The list of Available Columns for the Entity Listing has been updated (see "Changes to the Available Columns for the Entity Listing" beginning on page 4-13).	PM87
8227 and 8682	The Entity Listing filters have been updated (see "Changes to the Entity Listing Filter" beginning on page 4-18).	PM87
8318	The Mailing Lists tab on the Entity form respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8319	The Bar Number window, opened from the Entity – Other Details – Bar Number window, respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8491, 8758, 8759, 8766, 8771, 8883, 8897, and 10254	There has been a major update in this release of how Practice Manager handles related entities. For more information, see "Changes Specific to Related Entities" beginning on page 4-20.	PM87

PCR	Description	In Version
8497	The Department field has been added to the Entity - General tab. This field originally appeared on the Related Entities tab, but a user could only be in one department value, so it was moved to this tab for consistency.	PM87
8530	Entity Listing respects new All Filter/Query Access Functional Security Option.	PM87
8620	Entity TreeView respects new All Filter/Query Access Functional Security Option.	PM87
8758, 8759, 8766, 8771, 8883, 8897, 10254	Related Entities functionality was updated. For more information, see "Changes Specific to Related Entities" beginning on page 4-20.	PM87
8760	If you start creating an entity that appears to be a duplicate of an existing entity in Practice Manager, a dialog box has always appeared advising you that the entity may be a duplicate. If this release of Practice Manager, we have made the message more informative, by telling you the user that created the entity, when they created the entity, and on what site the entity was created.  The site information is especially helpful when Site Security is enabled and you cannot see the sites where those records exist. Keep in mind, however, that PCR 9265 now provides the ability to limit the scope of duplicate checking if Site Security is enabled (see "Configuring Duplicate Entity Checking" beginning on page 11-24), as well as the entry for 9265 in this table.	PM87
8888	All phone fields have been expanded to display up to 25 characters when International Format is enabled. This was implemented due to changes in international long distance dialing to many countries.	PM87
8936	If you assign any non-Client entity to a matter and check the Client box for that assignment, the entity record is automatically updated so that the Client field is now checked. If autonumbering for Clients is enabled, then a Client Number is also generated. If you unassign a client from a matter or you change the matter-specific role definition such that Client is no longer checked for the matter, the entity record is not updated.	PM87

PCR	Description	In Version
8938	A new filtering option has been added to the Entity Listing to allow you to show only Matter Clients (i.e., those entities that are assigned to a matter where Client is checked in their role definition). The existing filtering option – Client – shows all entities where Client is checked in the entity record. The Entity – General tab, opened from a matter Entity listing, now includes the following fields from the Role details window: • Matter Side (lookup) • Party (checkbox) • Report To (checkbox)	PM87
8942	If you uncheck the Client field on the Entity – General tab, Practice Manager carries out an integrity check upon saving the record based on the value selected in System Settings for Show Clients in the Matter Info field based on either of the conditions listed below. If necessary, a warning is displayed advising you that changing the value will result in the entity no longer being a valid select for the Client/Billable field or assigned client entity. • If Client is selected and the entity is used in at least one matter in the Client/Billable field, the warning is displayed. • If Client AND Billable is selected and the entity is used in at least one matter in the Client/Billable field, the warning is displayed. • If the entity is assigned as a Client entity in at least one matter, then the warning is displayed. The warning reads as follows:  • Click Yes to continue saving the record with the Client checkbox cleared. • Click No to continue saving the record, however, the Client checkbox will be restored to checked.	PM87

PCR	Description	In Version
	• Click Cancel to return to the Entity – General tab without saving the record.	
8943	If you uncheck the Billable field on the Entity – General tab, Practice Manager carries out an integrity check upon saving the record based on the value selected in System Settings for Show Clients in the Matter Info field based on either of the conditions listed below. If necessary, a warning is displayed advising you that changing the value will result in the entity no longer being a valid select for the Client/Billable field or assigned billable entity. • If Billable is selected and the entity is used in at least one matter in the Client/Billable field, the warning is displayed. • If Client AND Billable is selected and the entity is used in at least one matter in the Client/Billable field, the warning is displayed. • If the entity is assigned as a Billable entity in at least one matter, then the warning is displayed. The warning reads as follows:  • Click Yes to continue saving the record with the Billable checkbox cleared. • Click No to continue saving the record, however, the Billable checkbox will be restored to checked. • Click Cancel to return to the Entity – General tab without saving the record.	PM87
8991	There is now the option, through System Settings, to disable the conflicts checking module in Practice Manager as it relates to Entities. You can still capture information about the Side of an entity – Pro, Con or Neither – but your firm can choose to disable any warnings that may appear as a result of a conflict that may exist between the current entity and the parent organization of that entity.	PM87
9183, 9374, 9412, and 9414	Entity Merge has been updated to better handle merging an individual and an organization.	PM87

PCR	Description	In Version
9265	There is now an option in Security Settings to limit entity duplicate checking to just those sites you have permission to access. This only impacts firms that have Site Security enabled. For example, if you permission to access the Atlanta and Denver sites, but not the New York site, and an entity you are creating exists on the New York site, you will not get a message advising you the entity already exists if this setting is selected in Security Settings. If the entity exists at either the Atlanta or Denver site, you will get the message.	PM87
9288	On the Entity – Other Details tab, the Judge checkbox only appears if the entity is of an Entity Type where the category is associated with Judges.	PM87
9491	Matter, entity and document auxiliaries now respect the same security settings as their parent records, including Site Security.	PM87
9624	Entity auxiliaries now respect functional security in the same way it is respected by the parent entity record.	PM87
9658	Opening the auxiliary from the Entity Listing now respect site security assignments.	PM87
9775	The order of fields for organization entities on the General tab have been rearranged to be more logical in terms of how the information is traditionally entered.	PM87
9775	The fields on the General tab for an organization entity have been rearranged to be more logical with respect to how information is entered.	PM87
4656	When the Entity Listing quick filter is set to ALL for Type, unselecting ALL advances the cursor to the Type look-up field.	PM87 SP1
10952 and 10959	The upgrade scripts now remove all unnecessary spaces and punctuation from the address fields, thereby improving the quality of document assembly merge: • If Address Line 3 contains only spaces or punctuation, clear the contents of the field. • If Address Line 2 contains only spaces or punctuation and Line 3 is blank, clear the contents of the field. • If Address Line 2 contains only spaces or punctuation and Line 3 is not blank, move the value from Address Line 3 to Address Line 2, overwriting the contents (spaces and punctuation) of 2 and leaving Address Line 3 blank.	PM87 SP1

PCR	Description	In Version
	• If Address Line 1 contains only spaces or punctuation and Line 2 is blank, clear the contents of the field. • If Address Line 1 contains only spaces or punctuation and Address Line 2 is not blank, move the value from Address Line 2 to Address Line 1, overwriting the contents (spaces and punctuation) of Address Line 1. And, if Address Line 3 is blank, clear the contents of Address Line 2, else move the contents of Address Line 3 to Address Line 2, as well.	
11057 and 11175	Editing an Entity Type Description or Entity Role Description now checks to see if that Entity Type or Entity Role is used by one or more document assembly components. If yes, a dialog box appears, giving you the option to automatically run the document assembly component field name conversion utility (pmtemplate.exe), thereby updating the merge field labels as needed:  • Click Yes to run the utility. • Click No to not run the utility. The changes will be queued and applied the next time the utility is manually run.	PM87 SP1
11340	When assigning an entity to a matter, if you choose a role with which the entity is already assigned to that matter, message appears advising you that the entity is already assigned with that role. You cannot assign a matter more than once with the same role. If you edit the entity from within a matter and click on the Roles listing, you will see all roles that are available for use with the entity. Roles that have already been used for the entity are excluded from the list.	PM87 SP1
11664	The preview panel for auxiliaries may not be wide enough for some auxiliary forms, cutting off fields on the right side of the form. Horizontal scrollbars will be added in an upcoming releases of Practice Manager to resolve this issue. If the ability to preview auxiliary information is critical, it is recommended that the dimensions of the forms be adjusted such that they will comfortably fit in the area provided. The option is to increase the resolution of your	PM87 SP1

PCR	Description	In Version
	monitor (e.g., from 800x600 to 1024x768), which allows for a larger preview area.	
11712	The Entity TreeView filters have been updated to default as follows: Matter branch • Uses the global matter listing filter form. • The default for the filter is read from Preferences-Listings-Matter. • Preferences-Listings-Matters-Undefined uses the same defaults as the global matter listing. • The matters listed are those where the current entity is either assigned to the matter OR the matter-client. Entity branch • Looks to entity-specific or matter-specific entity relationships. Document branch • Uses the global document listing filter form. • The default for the filter is read from Preferences-Listings-Documents. • Preferences-Listings-Documents-Undefined uses the same defaults as the document listing, only with ALL authors selected. • The documents listed are those where the current entity is related to the document. Timeslip branch • Uses the global timeslip listing filter form. • The default for the filter is read from Preferences-Listings-Timeslips. • Preferences-Listings-Timeslips-Undefined uses the same defaults as the timeslip listing. • The timeslips listed are those where the current entity is the timekeeper OR the matter.client. Note • Uses the entity notes listing filter form. • The default for the filter is read from Preferences-Listings-Notes. • Preferences-Listings-Notes-Undefined uses the same defaults as the note listing, only with ALL authors selected.	PM87 SP1

PCR	Description	In Version
	• The notes listed are those where the current entity is related to the note. <u>Groupware</u> • Uses global groupware listing filter form. • The default for the filter is read from Preferences-Listings-Groupware. • Preferences-Listings- Groupware-Undefined uses the same defaults as the groupware listing, only with ALL senders selected. • The groupware items listed are those where the current entity is related to the groupware item (From, To, CC, or BCC). <u>Issues</u> • Does not have a filter. • The filter button is disabled. <u>Workflow</u> • Uses the global workflow listing filter form. • The default for the filter is read from Preferences-Listings-Workflow. • Preferences-Listings-Workflow-Undefined uses the same defaults as the workflow listing, only with ALL staff/users selected. • The workflow items listed are those where the current entity is related to the workflow item (Responsible, Notify, Meet/Speak With, Related To, Assigned By).	
11860	Multi-select on the Entity Listing now supports delete functionality as follows: • Select one or more records on of the listing, and choose Delete. • The Delete Confirmation message appears • Click No to keep the selected record(s) or Yes to proceed with deleting the selected record(s). The system then begins deleting items. When a condition exists that does not allow the record to be deleted, the appropriate message appears once. The answer is then applied to all like conditions. For example, if the record is from another site other than your active site, a message appears advising you that you cannot delete records from that site. This message only appears once during the delete operation, and not each time a record is encountered.	PM87 SP1

PCR	Description	In Version
	When complete, the listing refreshes if Auto refresh is enabled.	
11877	When you edit an entity from the matter-entity listing, where both the entity and the matter are from a site other than your active site, the only fields available for editing are the assignment fields: Role, Role Details, Matter Side, Party Type, Matter Client, Report To and Party fields. This is because assignment is not site-specific.	PM87 SP1
12138	The Code field is no longer impacted by the “Change Staff Information” security when the entity is not staff.	PM87 SP1
12250	In Practice Manager v8.0, an entity could only have one auxiliary form. With the release of Practice Manager v8.5, entities could now have up to three auxiliary forms: • One auxiliary based on the Entity Type • One auxiliary based on whether the entity was an individual or organization • One auxiliary based on their role assignment in a matter. This now means that, when you right-click on an entity in a listing and choose Auxiliary, up to three forms may open, one on top of the other.	PM87 SP1
12283	Date of Death (DOD) has been added to the entity listing and query.	PM87 SP1
12892	With Practice Manager v8.1, the Address Description for an entity address became a required field. This was not the case in v8.0 and earlier. This means that it is necessary to populate this field for all addresses. Also, there have been requests to designate one Address Description as the default. This PCR resolved both issues: First, to the Entity Settings - Address Description grid... • To the right-click menu (yes, it has one for some reason), the option Set as Default was added. • A Set as Default button was also added. • A Is Default column to the right of the Description field on the listing. • When Set as Default is selected, the highlighted Address Description becomes the default. Second, to the Address Description DE form, a Default check box was added. When checked, this Address Description becomes the default.	PM87 SP2

PCR	Description	In Version
	Third, when you close the Entity Settings form… Practice Manager checks to see if an Address Description was set as the default. • If no, the following message appears: ------------------------------------- You have not selected one of the Address Descriptions to be the default description used for creating new entities. Do you want to select on now? ------------------------------------- Clicking Yes returns the user to the Entity Settings window with the Address Descriptions tab active. Clicking No continues to close the window. • If yes, Practice Manager checks to see if any Addresses have Description fields that have not been populated from an earlier upgrade. if no, the window continues to close. If yes, the following message appears: ------------------------------------- In Practice Manager v8.0, you were allowed to create addresses for entities without a Description. In Practice Manager v8.5, this was changed, making Descriptions required for all addresses. This means that users are required to select an Address Description every time they open then close an entity record or edit and existing address record. Practice Manager can now go through and update all existing addresses to use the [description] Address Description for all addresses that currently do not contain an address. This process may put a temporary higher than normal load on the database server. Do you want to proceed? * Click Yes to proceed with the update. * Click No to not update existing record. This dialog will continue to appear each time you close the Entity Settings window until the update has been executed. * Click Cancel to return to the Entity Settings window if you want to choose a different default Address Description to use for this update. -------------------------------------	

PCR	Description	In Version
	And finally, when the user creates a new entity and/or address, the default Address Description is pre-selected in the lookup field. This way, the user does not have to remember to pick one every time.	
12945	If System Settings:Client Requires Number is checked and the user checks Client on the Entity Details - General tab, then switches to the Other Details tab, the contents of the Code field is validated as follows: • If populated, no action is required. • If not populated, the state of the form is set to edited so that if you try to Close, you will be prompted to Save changes. If you choose Yes, the message advising you to enter a Code will be displayed. If you choose No, the record will be closed and the Client field cleared – this is basically assuming you have chosen not to make the entity a client because you didn't enter a code.	PM87 SP2
13837 and 13869	The Require Bar Numbers and Bar Numbers button is now available on the Entity–General tab for all individual entities. This allows bar numbers to be entered for individual entities, other than Staff or Judges. This field only appears if Allow General Bar Numbers is assigned to the user’s active security role through functional security. The Require Bar Numbers and Bar Numbers button continue to appear on the Entity–Other Details tab for Staff or Judges, regardless of whether or not Allow General Bar Numbers is assigned to the user’s active security role.	PM87 SP2A

Changes Specific to the Entity Listing

The following sections described changes specific to the Entity Listing, and supporting filter and query functionality.

Changes to the Available Columns for the Entity Listing

PCR 8048, 8226, 8682, and 9443

The following fields were added to the list of Available fields for the Entity Listing:

Field Label	Data Source
Default Site Type Code	Other Details tab – User: This is the Code for the Site Type associated with the user's Default Site.
Default Site Type Description	Other Details tab – User: This is the Description for the Site Type associated with the user's Default Site.
Department	General tab: This is the entity's department.
Entity Type Category	General tab: This is the Category of the Entity Type.
Gender	General tab: This is the entity's gender.
Home Site Code	Other Details tab – User: This is the Code for the user's Home Site (this is the same as the Site for the entity record.
Home Site Description	Other Details tab – User: This is the Description for the user's Home Site (this is the same as the Site for the entity record).
Home Site Type Code	Other Details tab – User: This is the Code for the Site Type associated with the user's Home Site (this is the same as the Site for the entity record).
Home Site Type Description	Other Details tab – User: This is the Description for the Site Type associated with the user's Home Site (this is the same as the Site for the entity record).
Is Expert	Other Details tab (individual): This indicates whether or not the entity is an Expert.
Is Judge	Other Details tab (individual): This indicates whether or not the entity is a Judge.
Is Matter Client	General tab (from Matter): This indicates whether or not the entity is assigned to a matter as the Client.

Field Label	Data Source
Is Report To	General tab (from Matter): This indicates whether or not the entity is assigned to a matter as the Report To entity.
Login Name	Other Details tab – User: This is the user's Login Name.
Maiden Name	Other Details tab (Individual): This is the entity's Maiden Name.
Marital Status	Other Details tab (Individual): This is the entity's Marital Status.
Record ID	Other Details tab: This is the ID of the entity record in the database.
Religion	Other Details tab (Individual): This is the entity's religion.
Role Category	General tab (from Matter): This is the category of the role for the user in the matter.
Security Level	Other Details tab – User: This is the user's security level at the Default Site.
Side	General tab: This is the user's side with respect to the firm.
Timekeeper Level Code	Other Details tab – Staff/User: This is the staff/user's timekeeper level.

The following fields were renamed on the list of Available Fields for the Entity Listing:

Original Field Label	New Field Label
Site Code	Default Site Code
Site Description	Default Site Description
WP initials	Initials
Billable	Is Billable
Client	Is Client
Person	Is Person
Personnel	Is Staff
User	Is User
Ext.	Phone Ext
Timekeeper Level	Timekeeper Level Description

Changes to the Available Fields for the Address Listing

PCR 8682

The following fields were added to the Entity Address Listing as available fields (* indicates this field is also available from the right-click menu):

Field Label	Data Source
Phone 2 *	This is Phone 2 of the address.
Phone 2 Description *	This is the Description of Phone 2 in the address.

Changes to the Query Fields for the Entity Listing

PCR 3781, 8048, 8228, 8682, and 8923

The following fields were added to the Entity Listing Query as available field on which to search:

Field Label	Data Source
Creator Code	This is the Code of the entity record creator.
Creator Name	This is the Name of the entity record creator.
Default Site Type Code	Other Details tab – User: This is the Code for the Site Type associated with the user's Default Site.
Default Site Type Description	Other Details tab – User: This is the Description for the Site Type associated with the user's Default Site.
Department	General tab: This is the entity's department.
DOD	Other Details tab (Individual): This is the entity's Date of Death.
Entity Type Category	General tab: This is the Category of the Entity Type.
Gender	General tab: This is the entity's gender.
Home Site Code	Other Details tab – User: This is the Code for the user's Home Site (this is the same as the Site for the entity record.
Home Site Description	Other Details tab – User: This is the Description for the user's Home Site (this is the same as the Site for the entity record).
Home Site Type Code	Other Details tab – User: This is the Code for the Site Type associated with the user's Home Site (this is the same as the Site for the entity record).

Field Label	Data Source
Home Site Type Description	Other Details tab – User: This is the Description for the Site Type associated with the user's Home Site (this is the same as the Site for the entity record).
Is Deceased	Other Details tab (Individual): This indicates whether or not the entity is Deceased.
Is Expert	Other Details tab: This indicates whether or not the entity is an Expert.
Is Incompetent	Other Details tab (Individual): This indicates whether or not the entity is Incompetent.
Is Infant	Other Details tab (Individual): This indicates whether or not the entity is an Infant.
Is Judge	Other Details tab (individual): This indicates whether or not the entity is a Judge.
Is Matter Client	General tab (from Matter): This indicates whether or not the entity is assigned to a matter as the Client.
Is Report To	General tab (from Matter): This indicates whether or not the entity is assigned to a matter as the Report To entity.
Is Resident	Other Details tab (individual): This indicates whether or not the entity is a Resident.
Language	Other Details tab (individual): This is the Language of the entity.
Maiden Name	Other Details tab (Individual): This is the entity's Maiden Name.
Marital Status	Other Details tab (Individual): This is the entity's Marital Status.
Nationality	Other Details tab (individual): This is the Nationality of the entity.
Needs Translator	Other Details tab (individual): This indicates the entity needs a translator.
Occupation	Other Details tab (individual): This is the entity's occupation.
Record ID	Other Details tab: This is the ID of the entity record in the database.
Registration No.	Other Details tab (individual): This is the entity's registration number.
Religion	Other Details tab (individual): This is the entity's religion.
Reviser Code	This is the Code of the last revisor of the entity record.
Reviser Name	This is the Name of the last revisor of the entity record.

Field Label	Data Source
Role Category	General tab (from Matter): This is the category of the role for the user in the matter.
Security Level	Other Details tab – User: This is the user's security level at the Default Site.
Side	General tab: This is the user's side with respect to the firm.
Timekeeper Level Code	Other Details tab – Staff/User: This is the staff/user's timekeeper level.

The following fields were renamed in the Entity Listing Query as available field on which to search:

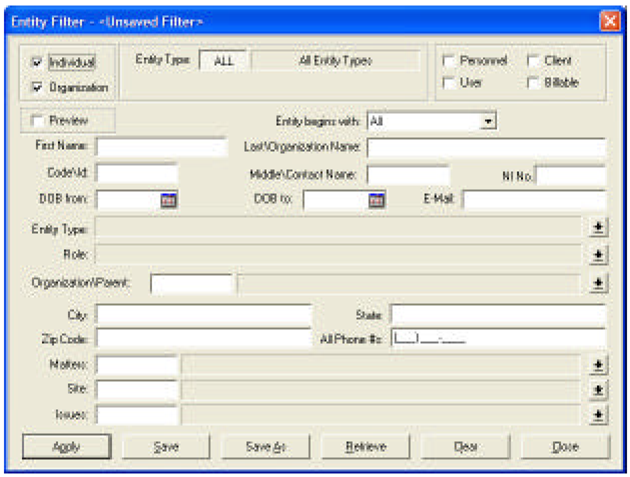
Original Field Label	New Field Label
Site Code	Default Site Code
Site Description	Default Site Description
WP initials	Initials
Billable	Is Billable
Client	Is Client
Person	Is Person
Personnel	Is Staff
User	Is User
Mailing List Lookup	Mailing List
Ext.	Phone Ext
Timekeeper Level	Timekeeper Level Description

Changes to the Entity Listing Filter

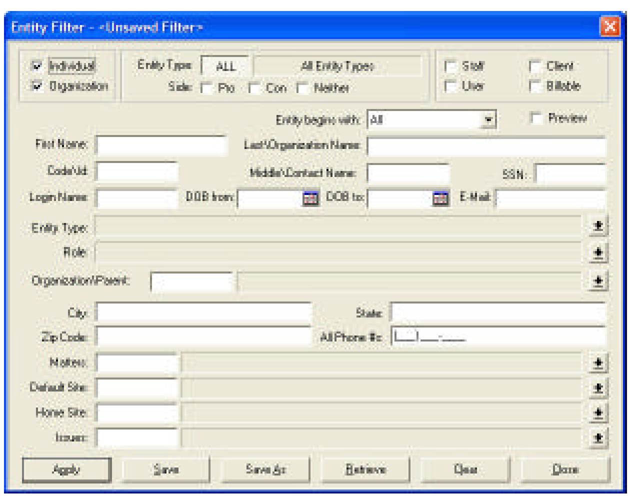
PCR 8227 and 8682

Global Entity Listing Filter

The Global Entity Listing filter appeared as follows in Practice Manager 8.6 SP2:

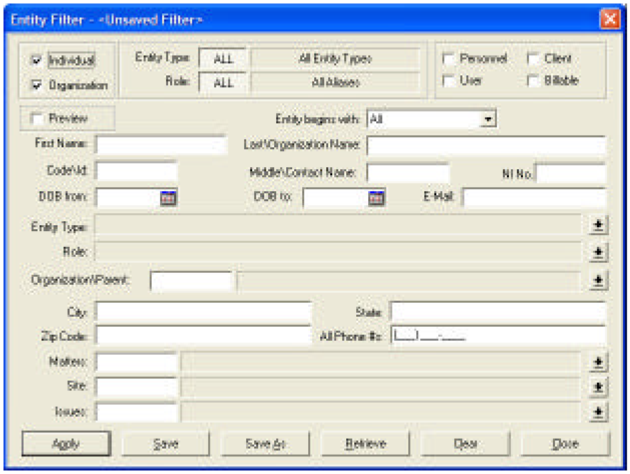


The Global Entity Listing filter appears as follows in the latest release of Practice Manager:

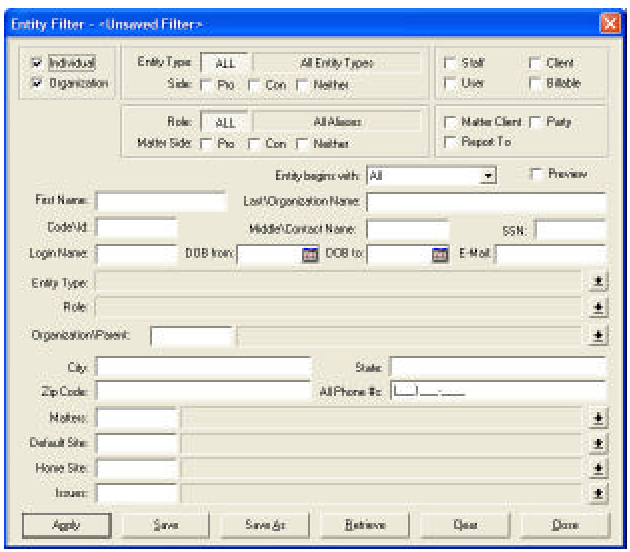


Matter-Entity Listing Filter

The Matter-Entity Listing filter appeared as follows in Practice Manager 8.6 SP2:



The Matter-Entity Listing filter appears as follows in the latest release of Practice Manager:



Changes Specific to Related Entities

PCR 8491, 8758, 8759, 8766, 8771, 8883, 8897, and 10254

There has been a major update in this release of how Practice Manager handles related entities. The following sections guide you through these changes.

What are relationships?

Related Entities are two entities that have been manually related to each other, and the nature of their relationship definition defined.

Relationships can be entity-specific (global) or matter-specific.

Only one global relationship can exist between two entities.

Each matter can have only one matter-specific relationship between two assigned entities – both entities must be assigned to the matter in order to establish a relationship, based on the role of the entities. The matter-specific Related Entity listing, however, will combine these assignments into a consolidated view so that all relationships for an entity can be viewed (see Section 3).

Two entities can have relationships defined for one or more matters.

For the purposes of clarity, the term "Entity 1" is used to define the currently active or selected entity, and "Entity 2" is used to define the entity being related to Entity 1. This terminology does not, however, suggest that one entity is superior to the other, as in a parent-child relationship. The relationship is completely reciprocal. If focus were reversed, so would the relationships.

What does reciprocal mean?

Basically, reciprocal means the relationship goes both ways. When a relationship is established, each entity appears on the other's related entity listing.

Continuing the reciprocal nature of the relation, it is necessary in some cases to define the relationship for each entity from the perspective of the other. For example, if Entity 1 is the father and Entity 2 is the daughter, then two relationships need to be established – Entity 2's relationship to Entity 1, and Entity 1's relationship to Entity 2. This way, when viewed, the relationship descriptions are appropriate. When the user is viewing the Related Entities for the father (Entity 1), they will see the daughter (Entity 2) listed with the appropriate relationship description, and vice versa.

Indirect Relationships

Indirect Relationships are those relationships where two entities are related to a common record, but not necessarily to each other. For example, two entities may be related to the same matter, entity, document, note or workflow item, a direct entity relationship has not been established between the two.

There have been several requests to include functionality within Practice Manager that would list or somehow represent these relationships, other then through the common record, itself. This specification does not attempt to address that functionality at this time. This functionality may be addressed in a future release of Practice Manager as demand warrants its inclusion.

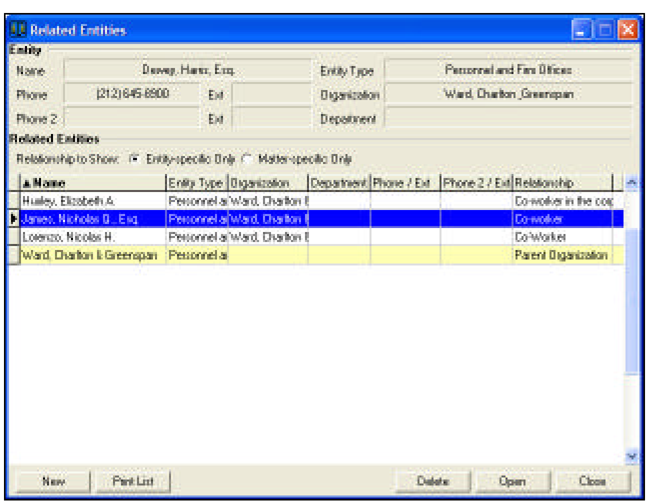
Working with Entity Relationships

Entity relationships are maintained through either the Global Entity Listing or Matter Entity Listing. Relationships maintained through the Matter Entity Listing are assumed to be specific to the current matter unless otherwise specified.

To List Entity Relationships

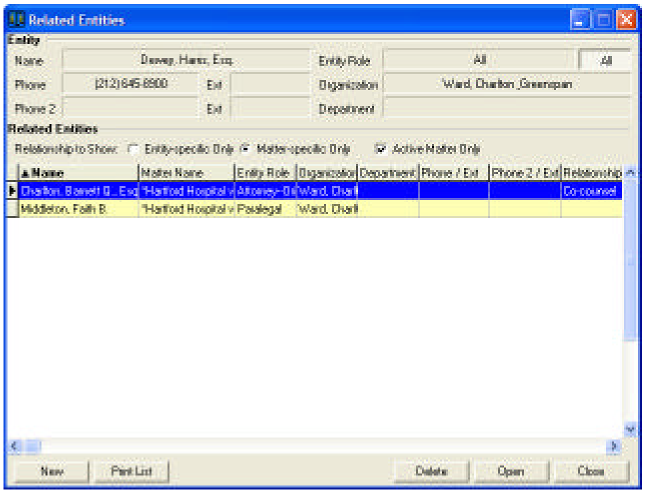
To display a list of relationships for an entity, highlight the entity on an entity listing, and choose Related Entities. The appropriate Related Entities window appears:

➢ From the Global Entity Listing...



- Clicking Entity-specific Only filters the listing to show only those relationships that are not matter-specific.
- Clicking Matter-specific Only filters the listing to show only those relationships that are matter-specific.

➢ From the Matter-Entity Listing...



- Clicking Entity-specific Only filters the listing to show only those relationships that are not matter-specific.
- Clicking Matter-specific Only filters the listing to show only those relationships that are matter-specific.
- Checking Active Matter Only filters the listing to show only those matter-specific relationships in the active matter.
- In the Entity Role field, you can view the relationships for all Roles of the select entity, or just the relationship for the selected Entity Role.

These are the fields that appear at the top of the Related Entity Listing window:

Field Label	Data Source
Department	Other Details tab (Individual): This is the department of the selected entity from the listing.
Entity Role	General tab: This is the Entity Role for the selected entity from the entity listing (only appears when opened from the Matter-Entity Listing).
Entity Type	General tab: This is the Entity Type for the selected entity from the entity listing (only appears when opened from the Global Entity Listing).

Field Label	Data Source
Name	General tab: This is the name of the selected entity from the listing.
Organization *	This is the Parent Entity for the selected entity from the entity listing.
Phone / Ext *	This is the Phone number for the selected entity from the entity listing.
Phone 2 / Ext *	This is the second Phone number for the selected entity from the entity listing.

The list of Available fields for the Related Entities Listing was revised to be as follows (* indicates this field is also available from the right-click menu):

Field Label	Data Source
Creation Date	This is the date the Entity Relationship was created.
Creator Code	This is the Code of the Creator of the Entity Relationship record.
Creator Name	This is the Name of the Creator of the Entity Relationship record.
Department *	Other Details tab (Individual): This is the related entity's department.
Entity Role *	General tab: This is the Role with which the related entity was assigned to the matter (for matter-specific relationships only).
Entity Type *	General tab: This is the Entity Type for related entity.
Matter Name *	This is the name of the matter for which the relationship was created (for matter-specific relationships only).
Name *	This is the name of the related entity.
Organization *	This is the organization of the related entity.
Phone / Ext *	This is the Phone number and Extension of the related entity.
Phone 2 / Ext *	This is the Alternate Phone number and Extension of the related entity.
Relationship *	This is the related entity's relationship with the active entity.
Revision Date	This is the date the Entity Relationship was last revised.
Revisor Code	This is the Code of the last user to revise the Entity Relationship record.
Revisor Name	This is the Name of the last user to revise the Entity Relationship record.

To Maintain Entity Relationships

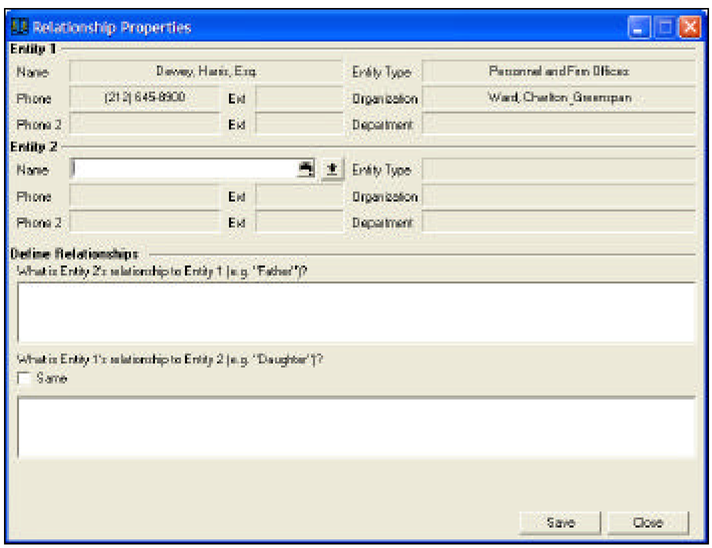
Entity Relationships are maintained from the Related Entities window:

- If the window was opened from the Global Entity Listing, the relationship is Entity-specific.
- If the window was opened from the Matter-Entity Listing, the relationship is Matter-specific

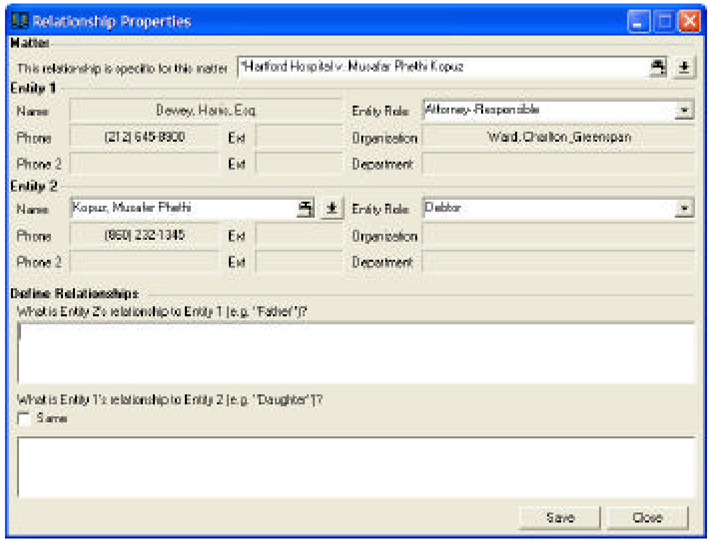
Creating New Relationships

1. Clicking New displays a blank Relationship Properties window with the current entity pre-selected in the Entity 1 fields (this cannot be changed from this window).

   - If the window was opened from the Global Entity Listing, it appears as follows:



- If the window was opened from the Matter Entity Listing, it appears as follows:



2 Choose the Matter for which you are defining the relationship.

- This field only appears for matter-specific entity relationships.
- The default value is the active matter; however, you can choose any matter, keeping in mind that you won't see that relationship until you open that matter listing.

3 Choose Entity 2.

4 Enter Entity 2's relationship to Entity 1.

5 Enter Entity 1's reciprocal relationship to Entity 2 (check same if the relationship is the same, such as "co-worker").

6 Save the record and Close the window as needed.

Modifying Relationships

1 On the related Entity listing, highlight the relationship you want to modify, and click Open. The Relationship Properties window pre-populated with the current entity pre-selected in the Entity 1 fields and the selected entity in the Entity 2 fields.

2 Modify the fields as needed.

3 Save the record and Close the window as needed.

Deleting Relationships

1 On the related Entity listing, highlight the relationship you want to delete, and click Delete. The Delete Confirmation window appears.

2 Proceed as follows:

- Click Yes to delete the relationship.
- Click No to keep the relationship.

You can also delete entity relationship from the Relationship Properties window.

Documents

Summary of Document Changes

There are 390 Document-related PCRs addressed in these releases of Practice Manager for the following areas:

- 168 PCRs for the Document Profile, Listing, Filter and Query
- 178 PCRs for Document Assembly
- 22 PCRs for Mail Merge
- 22 PCRs for Imaging

This includes, but is not limited to the following:

PCR	Description	In Version
4084	Merging of Entity Auxiliary fields has been updated as follows: • For Entity Type Aux fields: In the Aux table, locate the first record where the EntityID is an Entity assigned to the document parent matter (from ASSIGN table), and populate the fields with that AUX data. This ignores any querying on Entity Type as the only way a record can exist in the AUX table for an Entity is if the AUX is assigned to an Entity Type, and the Entity with the record in the AUX table is of that Entity Type. • For Entity Assign Aux fields: In the Aux table, locate the first record where the ASSIGNID is for an assignment to the document parent matter, and populate the fields with that AUX data. As with Entity Type, this ignore any querying on Entity Role or Entity as the only way a record can exist in the AUX table for an Entity is if the AUX is assigned to a Law Type and Entity Role, and the Entity with the	PM87

PCR	Description	In Version
	record in the Aux table is assigned to a matter of the Law Type with that Entity Role.	
6214	You can no longer create a Profile Only document record for a file that has been dragged into Practice Manager.	PM87
6672	Author, creator, reviewer and reviser are now related to the document and cannot be manually unassigned.	PM87
6748	In earlier versions of Practice Manager, users were instructed to add commas to the Suffix and Professional Suffix fields so they would be properly listed and merged. This requirement has been removed; however, many old records still contain those commas in these fields. As part of the upgrade, any commas found at the end of the Suffix and Professional Suffix fields are removed, along with any spaces. Document assembly merging now handles the placement of those commas in the generated document.	PM87
7370	You can now always create a Profile Only document, regardless of what your User Preferences are for Default Document Incoming/Outgoing: • If Always Ask is selected, you choose whether the Profile Only document record is incoming or outgoing. • If Always Incoming is selected, Profile Only document records will always be incoming (the selection fields are disabled). • If Always Outgoing is selected, Profile Only document records will always be outgoing (the selection fields are disabled). • If Inc-scanned/Out-generated is selected, new documents will always be outgoing and scanned documents will always be incoming (the selection fields are disabled).	PM87
7455, 9727	Document auxiliaries now respect the Site and Matter Security of the parent document record.	PM87
7896 and 8232	Macro is no longer available as a Document Assembly Component Type.	PM87
7897	The Component Type list is now sorted alphabetically.	PM87
7995 and 8181	With the new Full Text Searching integration installed, a “% Match” column is now available after you carry out a full text search, indicating the relevance of the matching for the words entered.	PM87

PCR	Description	In Version
8218	Macros have been developed for converting the Civil Action No. field (mat_civactno) in document assembly components to (mat_caseno). If you need to run these macros on your components so they continue merge properly, please contact Practice Manager Application Support.	PM87
8279	Microsoft Word XP is now an available engine for merging document applications.	PM87
8284	The Related Matters tab on the Document Profile respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8284	The Assign Entities window, opened from the Related Entities tab on the Document Profile, respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8299	On the Addressee/CC/BCC, Plaintiff/Defendant, Cert Entity and Subject pick windows, the functionality of the assign and unassign buttons has been updated: • Assign (>) selects the highlighted records. • Assign All (>>) selects all records, ignoring the Max Rows value in System Settings (this should be used with caution when working with the Global Entity Listing). • Unassign (<) removes the highlighted records. • Unassign All (<<) removes all records from the active panel, ignoring the Max Rows value in System Settings. • Clear All (<<<) removes all records from all panels of a multi-panel pick window, such as /CC/BCC or Plaintiff/Defendant.	PM87
8401	The following engines are no longer available for document assembly design or merging: • WordPerfect 6.0/6.1 for Windows • Corel WordPerfect 7.0 • Microsoft Word 6.0/6.1 for Windows • Microsoft Word 95	PM87
8402 (related to 8279 and 8401)	Microsoft Word XP is now an available engine for designing document assembly components.	PM87

PCR	Description	In Version
8403 (related to 8401)	Corel WordPerfect 2002 is now an available engine for designing document assembly components.	PM87
8502 and 8587	Drag'n'drop of HTM/HTML files is now fully supported in the Document module.	PM87
8531	Document Listing respects new All Filter/Query Access Functional Security Option.	PM87
8682	The list of available columns for the document listing has been updated with new fields, and some fields have been renamed (see "Changes to the Document Listing" beginning on page 5-15) The list of available fields on which to query the document listing has been updated with new fields, and some fields have been renamed (see "Query Fields for the Document Listing" beginning on page 5-16). The list of available fields for inclusion in Document Assembly Components and Merging has been updated with new fields and some fields have been renamed (see "Changes to Fields in Document Assembly" beginning on page 5-19)	PM87
8708	Copy documents functionality now respects Max Files in Directory setting.	PM87
9130 and 9659	Matter, entity and document auxiliaries now respect the same security settings as their parent records, including Site Security.	PM87
9317	All fields that once had a pound sign (#) in the description have been updated with "No."	PM87
9338	If an entity is assigned to a matter with more than one role, and Block or String fields are included in the document assembly component for the Entity Type matching that entity, the entity information will only populate the document once.	PM87
9556	When Entity Notes selection screen is invoked during merge, the Entity Name now appears on the pick window so you know which entity you are selecting a note for.	PM87
9557	If an entity is used by more than one field group (e.g., creator, author, etc.), the Entity Note pick window is now invoked for each instance so you can choose a different entity note for use with each field group.	PM87
9598	In earlier versions of Practice Manager, it was possible for Entity Type and Entity Role fields to be populated with the wrong information because their description text was the same. To make the fields more unique, Entity Type fields are now prefixed with "ET_" and Entity Role fields are now	PM87

PCR	Description	In Version
	prefixed with “ER_”. Both are then followed by the Description and the merge field.	
9623	The Auxiliary menu item on the Document Listing now respect Open Document Profile security.	PM87
9623	Document auxiliaries now respect the functional security of the parent document record.	PM87
10004	Drive Mappings are respected at all times, regardless of whether or not Site Security is enabled.	PM87
10005	Document versions are now stored in the same location as the original document, and now respect Drive Mappings.	PM87
10132	TIFF Viewer and Image Viewer now respect Drive Mappings.	PM87
10148	If the user does not have a Drive Mapping for the document site, the following items are disabled for documents of that site: • Open on the Document Profile and Document Listing shortcut menu • Groupware on the Document Profile and Document Listing shortcut menu • New Version and Version Listing on the Document Profile and Document Listing shortcut menu	PM87
10591	Document Assembly merging respects the updated Site Security model for Entity Type and Entity Role fields.	PM87
4654	When the Document Listing quick filter is set to ALL for Author, unselecting ALL advances the cursor to the Author look-up field.	PM87 SP1
6481, 7047 and 11013	Support for Corel 2002 was introduced in Practice Manager v8.7 and formally certified in this service pack.	PM87 SP1
9941, 10931, 10933, 11349, 11388, 11390, 11397, 11399, and 11605	A new Field Name Conversion utility (PMTemplate.exe) has been added for Document Assembly. For more information, see "PMTemplate.exe" beginning on page 11-41.	PM87 SP1
10994	In Practice Manager v8.6 and higher, you can assign one or more templates and boilerplates, in any combination, to a Law Type/Document Type combination, optionally designating one combination as the default that always is selected on the Document Profile. In previous versions of Practice Manager, you could only assign one template/boilerplate combination to a Law	PM87 SP1

PCR	Description	In Version
	Type/Document Type combination; therefore, the default designation was not needed. When you convert from Practice Manager v8.5 or lower to Practice Manager v8.6 or higher, there is still only one template/boilerplate combination assignment for each Law Type/Document Type combination, by default. If you make other assignments to the Law Type/Document Type combination. The need to designate a template/boilerplate combination assignment as the Default assignment is only necessary if you assign addition template/boilerplate combinations to a Law Type/Document Type combination.	
11011	The document assembly merge progress indicator now reads “Merging Document.”	PM87 SP1
11179, 11181, and 11381	Document assembly merge fields for Entity Type and Entity Role now include the Entity Type ID or Entity Role ID to insure total uniqueness when creating the merge field. This results in a merge field that uses the following format: • ET####Description_FieldLabel • ER####Description_FieldLabel If the length of the Entity Type or Entity Role Description field exceeds 21 characters, the following message appears, indicating the Description text will be modified and truncated in order to produce a field that can be used in Microsoft Word and Corel WordPerfect. 	PM87 SP1
11326 and 11359	The merge field list for newly created templates now includes vertical and horizontal scroll bars to make it easier to ready the merge field labels.	PM87 SP1
11379, 11449 and 11632	Some document assembly merge label fields have been renamed in order to maximize the number of characters that can be displayed for Entity Type and Entity Role fields. For more information, see "Renamed Merge Fields" beginning on page 5-26.	PM87 SP1

PCR	Description	In Version
11510	The following were removed from the document listing as available fields: • Entity • Issue • Issue Code You can still query on values in these fields, you just cannot display them as available columns on the listing as they caused documents to be listed more than once if multiple values were selected.	PM87 SP1
11521	When working with document assembly and Word97, the error 'Failed to load Win32CMI.dll' may appear. This file must exist on your computer if you are using document assembly with Word97. It is typically installed in the <winversion>\System32\ folder as part of the Word97 installation. If this file does not exist on your computer, you should reinstall Word97. Note, if you use Word2000 or WordXP to open an existing component that was created with Word97, and Word97 is no longer installed on your computer, you may also receive this error. The component should be converted to a Word2000 or WordXP component before attempting to use it.	PM87 SP1
11598 and 12058	Documents can now be opened Read Only. This change resulted in the following: • A new option for Document Applications – Allow files to be opened as read-only. • When Allow files to be opened as read-only is checked, files that are in use can be opened as read-only files IF the application supports such functionality (some applications do not). • When Allow files to be opened as read-only is not checked, files that are currently in use cannot be opened, and a message appears advising you of this. For more information, see "Allowing Documents to be Opened as Read Only" beginning on page 5-17. Note that when Allow files to be opened as read-only is not checked, the Open button is still enabled for files on the listing and document profile, even if the file is in use. The checking only occurs after you choose this option. This is because you may open the profile of a document that is in use, then the person using the file closes it, and then you choose open.	PM87 SP1

PCR	Description	In Version
11624	When creating a document assembly component in Word97, you must check OleInsertMerge.dot on the Tools – Templates and Add-ins window, then go to Tools – Macros – run OleDesign.	PM87 SP1
11701	Application and Index fields are no longer populated on Profile Only documents created from a Document Template.	PM87 SP1
11892	Multi-select on the Document Listing now supports delete functionality as follows: • Select one or more records on of the listing, and choose Delete. • The Delete Confirmation message appears • Click No to keep the selected record(s) or Yes to proceed with deleting the selected record(s). The system then begins deleting items. When a condition exists that does not allow the record to be deleted, the appropriate message appears once. The answer is then applied to all like conditions. For example, if the record is from another site other than your active site, a message appears advising you that you cannot delete records from that site. This message only appears once during the delete operation, and not each time a record is encountered. • When complete, the listing refreshes if Auto refresh is enabled.	PM87 SP1
11948	If you create a document assembly component, choosing the component type as Common, Law Category-specific or Law Type-specific, and then change the type, an error message appears the next time you design the document that reads “Method 'DesignMerge' not supported by automation object'”. Clicking OK closes the dialog with no adverse effects on Practice Manager or the component, itself. We have seen this happen where users have created Law Type- or Law Category-specific components, and then changed them to Common so they could be assigned to more than one Law Type. This is because they wanted to be able to use Entity Role fields which are specific to Law Types. The only “down” side of this approach is that the selected entity role may not be assigned to the Law Type to which the component is assigned, and then merge will not work successfully.	PM87 SP1

PCR	Description	In Version
12002	A new Security button has been added to the Document Profile. This button is visible when some form of Document Security is installed, other than Site Security or Matter-Document Security. For more information on the functionality of this button, refer to the documentation for the security module(s) you have installed.	PM87 SP1
12064	If a user attempts to delete a document profile for a document that is opened by another user, there is no checking in these three releases of Practice Manager. The profile is deleted, but the file remains because the file is locked by the user that has it open.	PM87 SP1
12246	Problems with merging fields from auxiliaries where auxiliary fields were being truncated, has been resolved. Components created in PM86 SP2 or earlier should now merge correctly. Components created with PM87 or PM87 SP1 (beta) will need to be recreated, or have the merge fields manually corrected in the component. If there is a large number of components that need to be corrected, contact Practice Manager Application Support, and they can arrange for an update of the PMTemplate.exe utility which will resolve this problem automatically.	PM87 SP1
12268	Practice Manager requires that the document assembly merge field length should not exceed 39 characters. It was discovered that a limitation exists with Word Perfect. WP states that it can handle merge field names over 40 characters long, but in fact it successfully merges only those that are less or equal to 39 characters. While total length of the field must not exceed 39 characters, further limitations are on Field Suffix-must be not longer than 25 characters.	PM87 SP1
12302 and 12304	Default is no longer an option when designing a document assembly component, nor is it an option on the Document Assembly Settings – Options tab for Word Processor. After upgrading, you should check to see that the appropriate Default Word Processor for Assembling has been selected for your organization. As part of the upgrade, any component with Default selected as the Engine was updated to use the default engine selected on the Document Assembly Settings – Options tab.	PM87 SP1

PCR	Description	In Version
12425 and 12505	A new utility – MSWDAFIX.EXE – has been added. It is recommended that this utility be run on all installation where the organization is also upgrading from Microsoft Word97 to Microsoft Word2000 or WordXP. We have found, through testing, that Word97 components can have their macro storage corrupted in such a way that they will not work with PM87 or higher, especially for Word2000 and WordXP. This is because we have changed to using OLE for all our merge calls, and while that method is far superior, it is also more sensitive with respect to corruption in the component files. This utility basically carries out the following on each component where the engine is Microsoft Word: • It creates a backup of the FRM file. • It then creates a new document. • From the FRM file, it inserts the original FRM (this also brings over the styles) and copies the Page Setup. • It then saves the new document with the DOC extension. • It then deletes the original FRM file. • It then renames the DOC file to match that of the FRM file. • For more information, see "MSWDAFIX.EXE" beginning on page 11-42.	PM87 SP1
12469	Document Assembly Settings : Assignment : Doc Types with No Defaults displays all Law Type / Doc Type combinations where no component or component combination has been designated as the default.	PM87 SP1
12477	When upgrading from a previous release of Practice Manager, if a Law Type / Doc Type combination has component or component combination assignments, but no assignment is designated as the default, the first assignment is automatically designated as the default.	PM87 SP1
12557	Some organization have reported a “defect” in which NestForm fields are not merging correctly. Upon investigation, it was found that these fields include a hard return (paragraph mark), which was preventing the merge from occurring. This is not a defect with Practice Manager or the NestForm command. The problem is with how the original field was selected. If you insert any of the following fields, you will need to wrap them with the NestForm command in order to produce the desired results:	PM87 SP1

<table>
<tr><th>PCR</th><th>Description</th><th>In Version</th></tr>
<tr><td></td><td>Field {(“Doc_BoilerPlate”)}

Field {(“Doc_Letterhead”)}

Field {(“Firm_Letterhead”)}

Field {(“Matter_Caption”)}

Field {(“Matter_COS”)}

Typically these fields are the only fields on that line, which means they are immediately followed by a paragraph mark. You should first select the field, and then Insert the NestForm command. This is where the problem occurs. In Microsoft Word 2000 and Word XP, as well as Corel 2000 and 2002, select the entire contents of a line also selects the paragraph mark. This can easily be confirmed by carrying out the following:

• Insert any one of the above fields in a document on a line by itself with only a paragraph mark immediately after it.

• Place the cursor to the immediate left of the field, which should be the beginning of the line.

• Hold the Shift key down and press the right arrow to select the field. Note that the paragraph mark is automatically selected. If you were to now Insert the NestForm command, the paragraph mark would be included within the NestForm code, causing the merge to fail for this field.

The solution is to make sure the paragraph mark is not selected when inserting the NestForm command.

In future updates of Practice Manager, we will be looking to update our PMTemplate utility to remove these unwanted paragraph marks, as well as combining the insert functionality for these fields along with the NestForm command.</td><td></td></tr>
<tr><td>12433</td><td>In Document Assembly Settings, if you change the Default Word Processor in any of the following combinations…

• Word97 to Word2000

• Word97 to WordXP

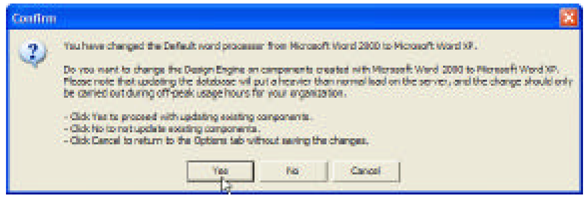
• Word2000 to WordXP

• WordPerfect 8 to WordPerfect 2000 (9)

• WordPerfect 8 to WordPerfect 2002 (10)

• WordPerfect 2000 (9) to WordPerfect 2002 (10)

A dialog appears, giving you the option of converting the Design Engine for your components as well.</td><td>PM87 SP2</td></tr>
</table>

PCR	Description	In Version
	 • Clicking Yes changes the Design Engine for you components, where the current engine is the one you changed from and the new engine is the one you have selected. • Clicking No does not change the components, but does change the Default Word Processor for creating new components. • Clicking Cancel returns you to the Options tab without saving the changes. You can actually carry out this conversion multiple times, simply by selecting and reselecting new word processors. For example, you have components created using Word97, Word2000 and WordXP. Your Default Engine was previously set to WordXP for new components, but now you want all your existing components converted to WordXP. • Choose Word97, and switch to another tab (e.g., Components). There will be no prompt. • Switch back to Options. Choose WordXP, and switch to another tab. You will be prompted to convert the existing components. Click Yes. • Switch back to Options. Choose Word2000, and switch to another tab. There will be no prompt. • Switch back to Options. Choose WordXP, and switch to another tab. You will be prompted to convert the existing components. Click Yes. The same can be carried out for WordPerfect. You cannot, however, convert from Word to WordPerfect, or vice versa.	
12895	Word now opens maximized during document assembly merge.	PM87 SP2
12900	Issues with Keyboard Prompts disappearing behind a Word during merge have been resolved. This was only occurring with some versions of Word.	PM87 SP2

PCR	Description	In Version
13293	The issue with the file path changing for document when they were copied, even if no field values had changed, have been resolved.	PM87 SP2
13379	In PM87, it was possible to generate document without a Document Type when only a Document Category was selected on the Tree, resulting in a document assembly failure. This has been corrected.	PM87 SP2
13453, 13457, 13361, 13392, 13510, and 13573	'RPC Server Unavailable' and WINWORD program errors have been resolved. These were the results of a conflict between the Note SpellChecker and Document Assembly.	PM87 SP2

13505	Drive mapping functionality has been updated as follows:
	Is the Document Site ID the same as the User's Active Site ID?
	• If YES, does the file exist at the location stored in the database?
	  • If yes, proceed with the selected action.
	  • If no, display the File Not Found error message and proceed with the selected action as follows:
	    • If trying to open the file, return to the window from which the message appeared.
	    • If trying to open the profile, open it as read only, with Description, Comments, List Versions, Timeslip, Groupware, Issues, Matters, Entities, Save and Close active.
	    • If trying to open the Versions from the listing, display the Version listing.
	    • If trying to open Auxiliary from the listing, display it.
	    • If trying to open Groupware from the listing, display the Groupware listing.
	    • If trying to Fax the document, return to the Document listing.
	• If NO, is there a mapping for the Document Drive?
	  • If yes...
	    • Replace the Document Drive with the User Drive from the mapping.
	    • Does the file exist at the mapped location?
	      • If yes, proceed with the selected action.
		PM87 SP2

PCR	Description	In Version

	• If no, display the File Not Found error message and proceed with the selected action as follows:
	  • If trying to open the file, return to the window from which the message appeared.
	  • If trying to open the profile, open it as read only, with Description, Comments, List Versions, Timeslip, Groupware, Issues, Matters, Entities, Save and Close active.
	  Note, if Site Security is enabled, Description, Comments and Save are disabled.
	  • If trying to open the Versions from the listing, display the Version listing.
	  • If trying to open Auxiliary from the listing, display it.
	  • If trying to open Groupware from the listing, display the Groupware listing.
	  • If trying to Fax the document, return to the Document listing.
	• If no, does the file exist at the location stored in the database?
	  • If yes, proceed with the selected action.
	  • If no, display the File Not Found error message and proceed with the selected action as follows:
	  • If trying to open the file, return to the window from which the message appeared.
	  • If trying to open the profile, open it as read only, with Description, Comments, List Versions, Timeslip, Groupware, Issues, Matters, Entities, Save and Close active.
	  Note, if Site Security is enabled, Description, Comments and Save are disabled.
	  • If trying to open the Versions from the listing, display the Version listing.
	  • If trying to open Auxiliary from the listing, display it.	

PCR	Description	In Version
	• If trying to open Groupware from the listing, display the Groupware listing. • If trying to Fax the document, return to the Document listing.	
13608	As a clarification, the Max Files in Directory field on the Document Settings – Options tab, only recognizes 8 digits even though you can enter more.	PM87 SP2

Changes to the Document Listing

Document Listing - Available Fields

PCR 8682

The following fields were added to the list of Available fields for the Document Listing:

Field Label	Data Source
Author Name	This is the full name of the Author.
Creator Name	This is the full name of the Creator.
Employer Name	This is the full name of the Employer
Entity	This is the full name of the related Entities. If you include this column, each document will be listed as many times as it takes to list all related entities.
Issue	This is the Description of the related issue for the document. If you include this column, each document will be listed as many times as it takes to list all issues.
Issue Code	This is the Code of the related issue for the document. If you include this column, each document will be listed as many times as it takes to list all issues.
Revisor Name	This is the full name of the last revisor.

The following fields were added to the list of Available fields for the Document Version Listing:

Field Label	Data Source
Date Revised	This is the date the document profile was last revised.

The following fields were renamed on the list of Available Fields for the Document Listing:

Original Field Label	New Field Label
Incoming	Is Incoming
Locked	Is Locked
Profile Only	Is Profile Only
Versions Required	Version Control

The following fields were renamed on the list of Available Fields for the Document Version Listing:

Original Field Label	New Field Label
Incoming	Is Incoming
Locked	Is Locked
Profile Only	Is Profile Only
Versions Required	Version Control

Query Fields for the Document Listing

PCR 8682

The following fields were added to the Document Listing Query as available field on which to search:

Field Label	Data Source
Author Name	This is the full name of the Author.
Creator Name	This is the full name of the Creator.
Employer Name	This is the full name of the Employer
Entity	This is the full name of the Related Entities.
Entity's Code	This is the Code of the Related Entities.

Field Label	Data Source
Issue	This is the Description of the related issue for the document.
Issue Code	This is the Code of the related issue for the document.
Issue Lookup	This is a lookup on related issue for documents.
Matter ID	This is the ID of the parent matter for the document.
Primary Matter No.	This is the Matter No. of the parent matter for the document.
Revisor Name	This is the full name of the last revisor.
Type (Relationship)	This is the Relationship of the Related Entity to the document. It allows you to find documents based on how entities are related to the document.

The following fields were renamed on the Document Listing Query as available field on which to search:

Original Field Label	New Field Label
Incoming	Is Incoming
Locked	Is Locked
Profile Only	Is Profile Only
Versions Required	Version Control

Allowing Documents to be Opened as Read Only

PCRs 11598 and 12058

The ability to open documents that are in use as “read-only” documents has been added to Practice Manager. This functionality is handled in part by Practice Manager, and in part by the application used for opening the file. If the application does not support opening in-use files as “read-only”, then this functionality is not available for files that use the application.

To the Application DE form, a checkbox option was a label of "Allows files to be opened as read-only." When checked, this setting is respect as follows:

Opening the File from the Document Listing

Practice Manager checks to see if the file is in use.

- If Yes, Practice Manager checks to see if the application supports read-only.
  - If Yes, Practice Manager opens the file, allowing the application to handle the read-only state (some applications display a message first).
  - If No, a message displays, advising the user the file is in use.
- If Not, the file opens.

Opening the Profile from the Document Listing

Practice Manager checks to see if the file is in use.

- If Yes, Practice Manager checks to see if the application supports read-only.
  - If Yes, the Document Profile form opens with the Description and Date fields active, as well as the Open, New Version, List Versions, Timeslip, Groupware, and Issues buttons enabled. All other fields and buttons are read-only/disabled.
  - If No, a message appears, and then the Document Profile form opens with the Description and Date fields active, as well as the New Version, List Versions, Timeslip, Groupware, and Issues buttons enabled. All other fields and buttons, including the Open button, are read-only/disabled.
- If No, Practice Manager opens the Document Profile with all fields and buttons enabled.

Opening the File from the Document Profile

Practice Manager checks to see if the file is in use.

- If Yes, Practice Manager checks to see if the application supports read-only.
  - If Yes, Practice Manager opens the file, allowing the application to handle the read-only state (some applications display a message first).
  - If No, a message displays, advising the user the file is in use.
- If Not, the file opens.

Changes to Fields in Document Assembly

New Merge Fields

PCR 8682

The following fields have been renamed in document assembly:

Field Label	Merge Field	Data Source	In Version
Field Groups: Addressee, Author, BCC, CC, Certificate Entities, Client, Creator, Defendant, Entity Type, Entity Role, Plaintiff, and Subject			
Addr1 Phone2 Description	(ent)_Addr1Phone2Desc	Entity Record – Primary Address – Phone 2 Description.	PM87
Addr2 Phone2 Description	(ent)_Addr2Phone2Desc	Entity Record – Secondary Address – Phone 2 Description.	PM87
Default Site Code	(ent)_DefSiteCode	Entity Record – Other Info – User – Default Site Code	PM87
Default Site Description	(ent)_DefSiteDesc	Entity Record – Other Info – User – Default Site Description	PM87
Default Site Type Code	(ent)_DefSiteTypeCode	Entity Record – Other Info – User – Default Site – Site Type Code	PM87
Default Site Type Description	(ent)_DefSiteTypeDesc	Entity Record – Other Info – User – Default Site – Site Type Description	PM87
Department	(ent)_Department	Entity Record – General – Department	PM87
DOD	(ent)_DOD	Entity Record – Other Info – Date of Death	PM87
Entity Role Details	(ent)_EntRoleDetails	Entity Record – Matter Assignment – Role Details	PM87
License No.	(ent)_ExpLicense	Entity Record – Other Info – Expert – License Expiration Date	PM87

Field Label	Merge Field	Data Source	In Version
Rating	(ent)_ExpRating	Entity Record – Other Info – Expert – Rating	PM87
Specialty Code	(ent)_ExpSpecCode	Entity Record – Other Info – Expert – Specialty Code	PM87
Specialty Description	(ent)_ExpSpecDesc	Entity Record – Other Info – Expert – Specialty Description	PM87
Sub-specialty Code	(ent)_ExpSubSpecCode	Entity Record – Other Info – Expert – Subspecialty Code	PM87
Sub-specialty Description	(ent)_ExpSubSpecDesc	Entity Record – Other Info – Expert – Subspecialty Description	PM87
Expert Type Description	(ent)_ExpTypeDesc	Entity Record – Other Info – Expert – Expert Type Description	PM87
Home Site Code	(ent)_HomeSiteCode	Entity Record – Other Info – User – Home Site Code	PM87
Home Site Description	(ent)_HomeSiteDesc	Entity Record – Other Info – User – Home Site Description	PM87
Home Site Type Code	(ent)_HomeSiteTypeCode	Entity Record – Other Info – User – Home Site – Site Type Code	PM87
Home Site Type Description	(ent)_HomeSiteTypeDesc	Entity Record – Other Info – User – Home Site – Site Type Description	PM87
Login Name	(ent)_LoginName	Entity Record – Other Info – User – Login Name	PM87
Maiden Name	(ent)_MaidenName	Entity Record – Other Info – Maiden Name	PM87
Marital Status	(ent)_MaritalStatus	Entity Record – Other Info –Matter Status	PM87
Matter Side	(ent)_MatterSide	Entity Record – Matter Assignment – Side	PM87
Occupation	(ent)_Occupation	Entity Record – Other Info –Occupation	PM87

Field Label	Merge Field	Data Source	In Version
Part No.	(ent)_Part	Entity Record – Other Info – Judge – Part No	PM87
Party Type	(ent)_PartyType	Entity Record – Matter Assignment – Party Type	PM87
Registration No.	(ent)_RegNumber	Entity Record – Other Info –Registration Number	PM87
Religion	(ent)_Religion	Entity Record – Other Info –Religion	PM87
Room No.	(ent)_Room	Entity Record – Other Info – Judge – Room No	PM87
Security Level	(ent)_SecurityLevel	Entity Record – Other Info – User – Security Level	PM87
Timekeeper Level Code	(ent)_TimeKeepLevelCode	Entity Record – Other Info – Staff – Timekeeper Level Code	PM87
Timekeeper Level Description	(ent)_TimeKeepLevelDesc	Entity Record – Other Info – Staff – Timekeeper Level Description	PM87
Timekeeper Number	(ent)_TimeKeepNumber	Entity Record – Other Info – Staff – Timekeeper Number	PM87
Field Group: Matter			
Audit Criteria	Mat_Billing_AuditInfo	Matter – General – Billing – Audit Information	PM87
Contingency (amount)	Mat_Billing_Contingency	Matter – General – Billing – Contingency	PM87
Payment Information	Mat_Billing_PmtInfo	Matter – General – Billing – Payment Information	PM87
Closed File Location	Mat_Closed_FileLocation	Matter – General – Closed File Location	PM87
Liability	Mat_Eval_Liability	Matter (Litigation) – Overview – Evaluation – Liability	PM87

Field Label	Merge Field	Data Source	In Version
Total Coverage	Mat_Eval_TotalCover	Matter (Litigation) – Overview – Evaluation – Total Coverage	PM87
Total Demand	Mat_Eval_TotalDeman d	Matter (Litigation) – Overview – Evaluation – Total Demand	PM87
Total Offer	Mat_Eval_TotalOffer	Matter (Litigation) – Overview – Evaluation – Total Offer	PM87
Total Settlement	Mat_Eval_TotalSettle	Matter (Litigation) – Overview – Evaluation – Total Settlement	PM87
Value High	Mat_Eval_ValueHigh	Matter (Litigation) – Overview – Evaluation – Value High	PM87
Value Low	Mat_Eval_ValueLow	Matter (Litigation) – Overview – Evaluation – Value Low	PM87
Facts	Mat_Facts	Matter (Litigation) – Overview – General – Facts	PM87
Farmed Out	Mat_FarmedOut	Matter (Litigation) – Overview – General – Farmed Out	PM87
Matter Group 1	Mat_Grp1	Matter (Litigation) – Overview – General – Group 1	PM87
Matter Group 1 Date	Mat_Grp1Date	Matter (Litigation) – Overview – General – Group 1 – Date	PM87
Matter Group 2	Mat_Grp2	Matter (Litigation) – Overview – General – Group 2	PM87
Matter Group 2 Date	Mat_Grp2Date	Matter (Litigation) – Overview – General – Group 2 – Date	PM87
Matter Group 3	Mat_Grp3	Matter (Litigation) – Overview – General – Group 3	PM87
Matter Group 3 Date	Mat_Grp3Date	Matter (Litigation) – Overview – General – Group 3 – Date	PM87

Field Label	Merge Field	Data Source	In Version
DOI	Mat_Incident_Date	Matter (Litigation) – Overview – General – Date of Incident Matter (Litigation) – Overview – Incident/Facts – Date and Time of Incident	PM87
Incident Description In Pleadings	Mat_Incident_Desc	Matter (Litigation) – Overview – Incident/Facts – Incident Description for Pleadings	PM87
Details	Mat_Incident_Details	Matter (Litigation) – Overview – Incident/Facts – Incident Details	PM87
Location Of Incident: City	Mat_Incident_LocCity	Matter (Litigation) – Overview – Incident/Facts – Location of Incident – City	PM87
Location Of Incident: Country	Mat_Incident_LocCountry	Matter (Litigation) – Overview – Incident/Facts – Location of Incident – Country	PM87
Location Of Incident: County	Mat_Incident_LocCounty	Matter (Litigation) – Overview – Incident/Facts – Location of Incident – County	PM87
Location Of Incident: State	Mat_Incident_LocState	Matter (Litigation) – Overview – Incident/Facts – Location of Incident – State	PM87
Location Of Incident: Street	Mat_Incident_LocStreet	Matter (Litigation) – Overview – Incident/Facts – Location of Incident – Street	PM87

Field Label	Merge Field	Data Source	In Version
Location Of Incident: Zip	Mat_Incident_LocZip	Matter (Litigation) – Overview – Incident/Facts – Location of Incident – Zip Code	PM87
User Defined Date1	Mat_IncidentDate1	Matter (Litigation) – Overview – Incident/Facts – User Defined Date 1	PM87
User Defined Date2	Mat_IncidentDate2	Matter (Litigation) – Overview – Incident/Facts – User Defined Date 2	PM87
Jurisdiction Court	Mat_JurCourt	Matter – General – Jurisdiction – Court	PM87
Last Review	Mat_LastReview	Matter (Litigation) – Overview – General – Last Review Date	PM87
Last Review By Code	Mat_LastReview_Code	Matter (Litigation) – Overview – General – Last Reviewed By Code	PM87
Last Review By	Mat_LastReview_Name	Matter (Litigation) – Overview – General – Last Reviewed By Name	PM87
Last Update	Mat_LastUpdate	Matter (Litigation) – Overview – General – Last Update Date	PM87
Last Update By Code	Mat_LastUpdate_Code	Matter (Litigation) – Overview – General – Last Update By Code	PM87
Last Update By	Mat_LastUpdate_Name	Matter (Litigation) – Overview – General – Last Update By Name	PM87
Law Type Code	Mat_LawTypeCode	Matter – General – Law Type Code	PM87
Matter Type Code	Mat_MatterTypeCode	Matter – General – Matter Type Code	PM87
Quick Notes	Mat_QuickNotes	Matter (Litigation) – Overview – General – Quick Notes	PM87

Field Label	Merge Field	Data Source	In Version
Settlement/Award Amount	Mat_Settle_Amount	Matter (Litigation) – Overview – Billing – File Disposition – Settlement/Award Amount	PM87
Comments	Mat_Settle_Comments	Matter (Litigation) – Overview – Billing – File Disposition – Settlement/Award Comments	PM87
Settlement/Award Date	Mat_Settle_Date	Matter (Litigation) – Overview – Billing – File Disposition – Settlement/Award Date	PM87
Final Payment Date	Mat_Settle_FinalPayDate	Matter (Litigation) – Overview – Billing – File Disposition – Settlement/Award Final Payment Date	PM87
Unsettled Case Disbursements	Mat_Settle_UnsetCaseDisb	Matter (Litigation) – Overview – Billing – File Disposition – Unsettled Case Disbursements	PM87
Unsettled Liens	Mat_Settle_UnsetLiens	Matter (Litigation) – Overview – Billing – File Disposition – Unsettled Case Liens	PM87
Unsettled Plaintiff Disbursements	Mat_Settle_UnsetPlaDisb	Matter (Litigation) – Overview – Billing – File Disposition – Unsettled Plaintiff Disbursements	PM87
Site Code	Mat_SiteCode	Matter – Site Code	PM87
Site Description	Mat_SiteDesc	Matter – Site Description	PM87
Site Type	Mat_SiteType	Matter – Site – Site Type Description	PM87
Site Type Code	Mat_SiteTypeCode	Matter – Site – Site Type Code	PM87
Status Age	Mat_StatusAge	Matter (Litigation) – Overview – General – Status Age	PM87

Field Label	Merge Field	Data Source	In Version
Substituted	Mat_Substituted	Matter (Litigation) – Overview – General – Substitued	PM87

Renamed Merge Fields

PCR 8218, 8682, 9317, 11379, 11449 and 11632

The following fields have been renamed in document assembly:

Original Field Label Original Merge Field	Original Field Label Original Merge Field	Reason for Change	In Version
Addr1 Data (ent)_Addr1Data	Addr1 Phone2 (ent)_Addr1Phone2	Updated to reflect changes in the entity data entry form.	PM87
Addr2 Data (ent)_Addr2Data	Addr2 Phone2 (ent)_Addr2Phone2	Updated to reflect changes in the entity data entry form.	PM87
Civil Action No Mat_CivilActNo	Case Number Mat_CaseNo	Updated to reflect changes in the matter data entry form.	PM87
Extension (ent)_Extension	Suffix (ent)_Suffix	Updated to reflect changes in the entity data entry form.	PM87
How Linked (ent)_HowLinked	Relationship to Parent (ent)_ParentOrgRel	Updated to reflect changes in the entity data entry form.	PM87
JurCourt Mat_JurCourt	Jurisdiction CourtType Mat_JurCourtType	Updated to reflect changes in the jurisdiction data entry form.	PM87
Linked To (ent)_LinkedTo	Organization (ent)_ParentOrg	Updated to reflect changes in the entity data entry form.	PM87
Prof Ext (ent)_ProfExt	Prof. Suffix (ent)_ProfSuffix	Updated to reflect changes in the entity data entry form.	PM87
SSN (ent)_SSN	SSN (ent)_SSN_EIN	Updated to reflect changes in the entity data entry form.	PM87
Title (ent)_Title	Prefix (ent)_Prefix	Updated to reflect changes in the entity data entry form.	PM87
BoilerPlate	BoilerPlate	Document – BoilerPlate	PM87 SP1

Original Field Label Original Merge Field	Original Field Label Original Merge Field	Reason for Change	In Version
Addr1Country	Addr1Cntry	Entity – Addr1 Country	PM87 SP1
Addr1PhonExt	Addr1PhExt	Entity – Addr1 Phone Ext	PM87 SP1
Addr1Phone2	Addr1Ph2	Entity – Addr1 Phone2	PM87 SP1
Addr1Phone2Desc	Addr1Ph2De	Entity – Addr1 Phone2 Description	PM87 SP1
Addr2Country	Addr2Cntry	Entity – Addr2 Country	PM87 SP1
Addr2County	Addr2Cnty	Entity – Addr2 County	PM87 SP1
Addr2PhonExt	Addr2PhExt	Entity – Addr2 Phone Ext	PM87 SP1
Addr2Phone2	Addr2Ph2	Entity – Addr2 Phone2	PM87 SP1
Addr2Phone2Desc	Addr2Ph2De	Entity – Addr2 Phone2 Description	PM87 SP1
Addr2ZipCode	Addr2Zip	Entity – Addr2 Zip Code	PM87 SP1
DefSiteTypeCode	DefSiteTypC	Entity – Default Site Type Code	PM87 SP1
DefSiteTypeDesc	DefSiteTypD	Entity – Default Site Type Description	PM87 SP1
EMailAddress	EMail	Entity – E-Mail Address	PM87 SP1
EntRoleDetails	EntRoleDet	Entity – Entity Role Details	PM87 SP1
HomeSiteCode	HomeSiteCod	Entity – Home Site Code	PM87 SP1
HomeSiteDesc	HomeSiteDes	Entity – Home Site Description	PM87 SP1
HomeSiteTypeCode	HomeSiteTyC	Entity – Home Site Type Code	PM87 SP1
HomeSiteTypeDesc	HomeSiteTyD	Entity – Home Site Type Description	PM87 SP1
MaritalStatus	MaritalStat	Entity – Marital Status	PM87 SP1
ParentOrg	ParntOrg	Entity – Organization	PM87 SP1
ParentOrgRel	ParntOrgRel	Entity – Relationship to Parent	PM87 SP1
SecurityLevel	SecLevel	Entity – Security Level	PM87 SP1
ExpSubSpecCode	ExpSubSpecC	Entity – Sub-specialty Code	PM87 SP1
ExpSubSpecDesc	ExpSubSpecD	Entity – Sub-specialty Description	PM87 SP1
TimeKeepLevelCode	TKeepLevCod	Entity – Timekeeper Level Code	PM87 SP1
TimeKeepLevelDesc	TKeepLevDes	Entity – Timekeeper Level Description	PM87 SP1

Original Field Label Original Merge Field	Original Field Label Original Merge Field	Reason for Change	In Version
TimeKeepNumber	TKeepNo	Entity – Timekeeper Number	PM87 SP1
Billing_AuditInfo	Bill_Audit	Matter – Audit Criteria	PM87 SP1
Closed_FileLocation	ClsdFileLoc	Matter – Closed File Location	PM87 SP1
Settle_Comments	StlComm	Matter – Comments	PM87 SP1
Billing_Contingency	Bill_Cont	Matter – Contingency (amount)	PM87 SP1
Incident_Details	IncdDetails	Matter – Details	PM87 SP1
Incident_Date	IncdDate	Matter – DOI	PM87 SP1
Settle_FinalPayDate	StlFnlPyDat	Matter – Final Payment Date	PM87 SP1
Incident_Desc	IncdDesc	Matter – Incident Description In Pleadings	PM87 SP1
JurCourtType	JurCourtTyp	Matter – Jurisdiction CourtType	PM87 SP1
LastReview	LastRev	Matter – Last Review	PM87 SP1
LastReview_Name	LastRevName	Matter – Last Review By	PM87 SP1
LastReview_Code	LastRevCode	Matter – Last Review By Code	PM87 SP1
LastUpdate	LastUpd	Matter – Last Update	PM87 SP1
LastUpdate_Name	LastUpdName	Matter – Last Update By	PM87 SP1
LastUpdate_Code	LastUpdCode	Matter – Last Update By Code	PM87 SP1
Eval_Liability	EvalLiab	Matter – Liability	PM87 SP1
Incident_LocCity	IncdLoCty	Matter – Location Of Incident: City	PM87 SP1
Incident_LocCountry	IncdLoCntry	Matter – Location Of Incident: Country	PM87 SP1
Incident_LocCounty	IncdLoCnty	Matter – Location Of Incident: County	PM87 SP1
Incident_LocState	IncdLoSt	Matter – Location Of Incident: State	PM87 SP1
Incident_LocStreet	IncdLoStr	Matter – Location Of Incident: Street	PM87 SP1
Incident_LocZip	IncdLoZip	Matter – Location Of Incident: Zip	PM87 SP1
MatterType	MatType	Matter – Matter Type	PM87 SP1

Original Field Label Original Merge Field	Original Field Label Original Merge Field	Reason for Change	In Version
Billing_PmtInfo	Bill_Pmt	Matter – Payment Information	PM87 SP1
Settle_Amount	StlAmount	Matter – Settlement/Award Amount	PM87 SP1
Settle_Date	StlDate	Matter – Settlement/Award Date	PM87 SP1
SiteTypeCode	SiteTypeCod	Matter – Site Type Code	PM87 SP1
Eval_TotalCover	EvalTtlCvr	Matter – Total Coverage	PM87 SP1
Eval_TotalDemand	EvalTtlDem	Matter – Total Demand	PM87 SP1
Eval_TotalOffer	EvalTtlOffr	Matter – Total Offer	PM87 SP1
Eval_TotalSettle	EvalTtlStle	Matter – Total Settlement	PM87 SP1
Settle_UnsetCaseDisb	StlUnstDisb	Matter – Unsettled Case Disbursements	PM87 SP1
Settle_UnsetLiens	StlUnstLien	Matter – Unsettled Liens	PM87 SP1
Settle_UnsetPlaDisb	StlUnstPlaD	Matter – Unsettled Plaintiff Disbursements	PM87 SP1
IncidentDate1	IncdDate1	Matter – User Defined Date1	PM87 SP1
IncidentDate2	IncdDate2	Matter – User Defined Date2	PM87 SP1
Eval_ValueHigh	EvalValHigh	Matter – Value High	PM87 SP1
Eval_ValueLow	EvalValLow	Matter – Value Low	PM87 SP1
MatterTypeCode	MatTypeCode	Matter Type Code	PM87 SP1

All Entity Type fields are now appended with ET_ to differentiate them from Entity Role fields, which are now appended with ER_.

Note

An upgrade utility is provided as part of the practice Manager upgrade program for upgrading the mat_civilactno field and mat_caseno.

It can be run manually to update your document assembly components. You can contact your RealLegal Account Manager or Practice Manager Application Support for assistance in running this utility.

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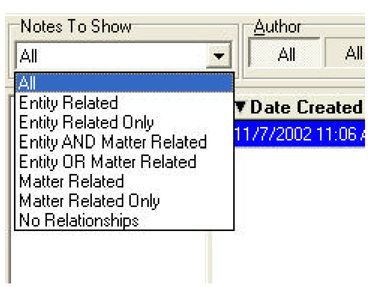
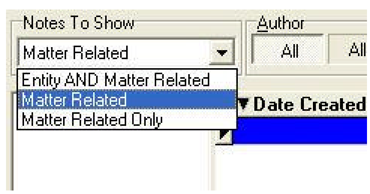
Notes

Summary of Note Changes

There are 92 Note- and Phone Call-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
6957 and 8240	Notes can be printed from the Note Listing. For more information, see "Printing Note Contents from the Note Listing" beginning on page 6-5.	PM87
8186	Note authors can only be entities marked as “Staff” on the Entity – Other Details tab.	PM87
8285	The Related Matters tab the Note form respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8286	The Related Entities tab the Note form respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8290	The Related Issues tab the Note form respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8534	Note Listing respects new All Filter/Query Access Functional Security Option.	PM87
9090	So that Notes now appear on the Related TreeView for Entities, the Author, Creator, and Revisor are automatically assigned to the note as Related Entities. They cannot be manually unassigned.	PM87
10052	Related Matters now respects Matter and Site Security.	PM87
4657	When the Note Listing quick filter is set to ALL for Author, unselecting ALL advances the cursor to the Author look-up field.	PM87 SP1
8640	When the Other Party is assigned to a Phone Call note, they are automatically assigned to the note under Related Entitles. This occurs whether the Phone Call note is new	PM87 SP1

PCR	Description	In Version
	or being edited. If you change the value in the Other Party field, the newly selected entity is assigned to the note under Related Entities. The previously selected Other Party remains assigned, as well. You must manually remove that entity if you no longer want them related to the note.	
9668 and 10265	In order to preview notes from the note listing, the entity must have Edit Notes in their security role for their active site.	PM87 SP1
9751	The tab order has been adjusted on the Note Listing as follows: • Grid (this is active upon opening) • Filter pane (if open) • New • Open • New Phone Call • Close • Notes to Show • Author (if ALL is not selected) • Note Type (if ALL is not selected) • Days	PM87 SP1
11066 and 11068	On the Global-Note listing quick filter and hot filter, the "Show Notes for" field has been changed from radio buttons to a drop-down list that shows all possible combinations of matter-notes:  • All (default) – These are all notes, regardless of related entities or matters. • Entity Related – These are notes that have an entity related to them. • Entity Related Only – These are notes that have an entity related to them, but not matters.	PM87 SP1

PCR	Description	In Version
	• Entity AND Matter Related – These are notes that have both an entity and matter related to them. • Entity OR Matter Related – These are notes that have either an entity or matter related to them, or both. • Matter Related – These are all notes that have a matter related to them. • Matter Related Only – These are notes that have a matter related to them, but no entities (this would only apply to existing notes, as all notes now have the Author and Creator related to them). • No Relationships – These are notes that do not have matters or entities related to them (this would only apply to existing notes, as all notes now have the Author and Creator related to them).	
11070 and 11072	On the Matter-Note listing quick filter and hot filter, the “Show Notes for” field has been changed from radio buttons to a drop-down list that shows all possible combinations of matter-notes:  • Matter Related (default) – These are all notes related to the matter, regardless of whether or not they are related to other matters or entities. • Entity AND Matter Related – These are all notes related to the matter that are also related to an entity. • Matter Related Only – These are notes that are only related to the matter, and not to other entities.	PM87 SP1
11437 and 11440	When a note is created, the Author and Creator are automatically assigned to the Note on the Related Entities tab. This means that it is no longer possible to save a note without related entities. And you cannot unassign these entities. Therefore, the save checking has been updated to skip checking for Related Entities. Saving a note still checks to see if any matters have been related to the note. If not, a message appears.	PM87 SP1
11666	Notes are only deleted automatically if the author is deleted. Deleting the creator, revisor or any other related entity will not automatically delete the notes related to those entities.	PM87 SP1

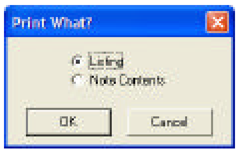
PCR	Description	In Version
12227	On Phone Calls, the phone fields may not refresh if you replace the selection in the Other Party field with a party of the same name. For example, if John Smith was selected and then you pick a different John Smith, the phone numbers from the first John Smith remain. The current solution is to clear the field and then re-pick the entity, or use the “cowboy hat” lookup control.	PM87 SP1
12239	When opening an existing note, you may be prompted to save changes upon close, even if no changes were made. Clicking No closes the window.	PM87 SP1
12455	Notes can now contain tab characters.	PM87 SP1
13013	Matter Name and Matter No have been added to the Note Listing. This field only displays the first note assigned to the matter based on when that matter was assigned. This may not be the same matter that appears at the top of the listing on the Related Matters tab. There are several issues that should be considered: • If the user is assigning more than one matter and they want a particular matter listed as the searchable matter on the listing, they should assign it first – there is no way in this release to designate one of the matters as primary or searchable. • Some confusion could exist in that a user may search for notes for a matter and actually see matters on the listing that are not the searched on matter – this is because matter searching looks at all assigned matters, not just the first matter, so a record could be returned because the searched for matter is one of the assigned matters, but not the first one. • In the Matter:Note listing, the matter column may contain a matter other than the active matter for the same reason as listed in the previous bullet-point.	PM87 SP2

Printing Note Contents from the Note Listing

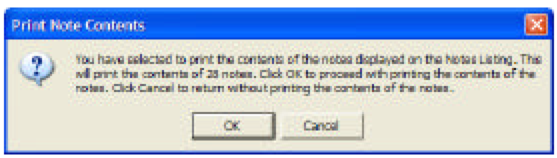
You can now print note contents from the note listing.

1. Filter the Note Listing to include just those notes with contents you want to print (you can print more than one at a time).

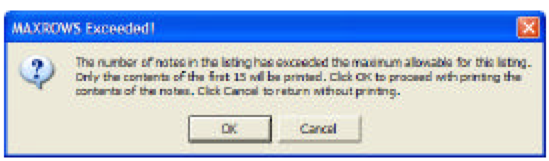
2. On the Note Listing, choose print. A dialog box appears:



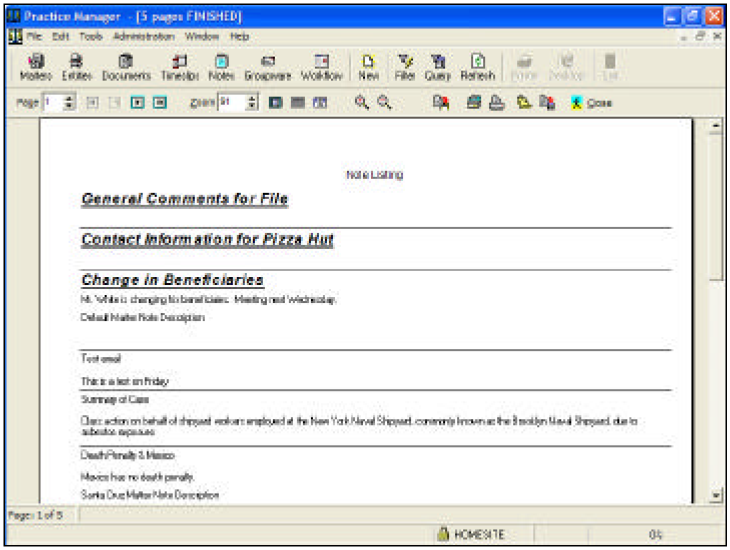
3. Choose Note Contents and click OK. A confirmation dialog box appears.



If the number of records on the listing exceeds the Max Rows values in System Settings, a dialog box appears advising you that Max Rows has been excited and only the first number of records equal to the Max Rows value will be printed:



4 Click OK. The Print Preview window appears with the contents of the selected notes separate by the Note Description.



From this window, you can view or print the notes as needed. Refer to the User's Guide for more information on working with the Practice Manager Print Preview window.

Groupware

Summary of Groupware Changes

There are 64 Groupware- and Groupware Settings-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
7254	When adding a Groupware item from outside of a matter, you can now select the matter for which the Groupware item is being created.	PM87
7890	The Matter-Groupware listing has been updated to default to items created for the matter in the last 30 days for All senders.	PM87
8291	Mail To, CC, and BCC respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8535	Groupware Listing respects new All Filter/Query Access Functional Security Option.	PM87
9072	Executing Projects respects the updated Site Security model.	PM87
9157	The Select Caller screen now respects Matter Security.	PM87
9159	Date Created has been added to Groupware items, and can be used in the Groupware Listing and Query.	PM87
4658	When the Groupware Listing quick filter is set to ALL for Sender, unselecting ALL advances the cursor to the Sender look-up field.	PM87 SP1
10755	Multi-select drag'n'drop into Groupware does not work with OutlookXP due to changes in the OutlookXP code base. You can continue to drag'n'drop individual items into Practice Manager from OutookXP. Multi-select drag'n'drop does work properly with Outlook97 and Outlook2000.	PM87 SP1

PCR	Description	In Version
11351 and 11849	The e-mail system selected in System Settings must be installed on the workstation, or the user will receive an error message when working with Groupware.	PM87 SP1
11905	Groupware only supports plain text and RTF formatted e-mails. If you drag'n'drop RTF formatted e-mails into Practice Manager, the formatting will be lost in the Practice Manager copy.	PM87 SP1
13853	The Subject line constrction options have been modified as follows: • You can now enable or disable including the Matter No. in the Subject line. • There is a new option for including the File No. in the Subject line. When either option is checked, a second option appears allowing you to place the number at the end of the line. Matter Name can still be enabled or disabled, and is always placed at the beginning of the Subject line. The construction of the Subject line has also been update as follows: • The Matter No. now has a label. The label and number are enclosed in brackets "{}" to separate them from other values. The number, itself, remains inside of square brackets "[]" in case the user has rules for auto-filing such e-mails that include the brackets in the rules. • The File No. has a label. The label and number are enclosed in brackets "{ }" to separate them from other values. The number, itself, is inside of square brackets "[]" just as it is with the matter number. • With numbers placed at the beginning of the line, the construction is as follows: {Matter No.[####]}{File No.[####]}{MatterName}SubjectText • With numbers placed at the end of the line, the construction is as follows: {MatterName}SubjectText{Matter No.[####]}{File No.[####]} It is possible for the matter number and file number in different locations on the Subject line, such as: {Matter No.[####]}{MatterName}SubjectText{File No.[####]} {File No.[####]}{MatterName}SubjectText{Matter No.[####]} When creating rules for processing e-mails, it is probably best to include the number label, as it would be possible for the matter number and file number to be the same.	PM87 SP2A

Workflow

Overview of Workflow Changes

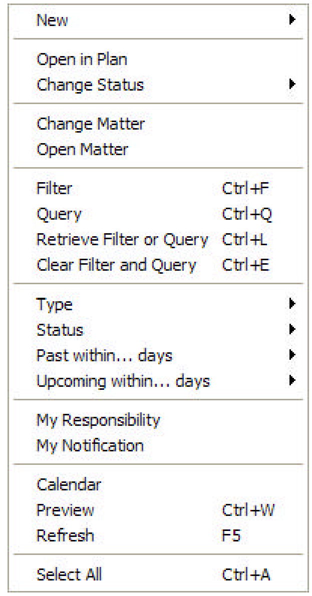
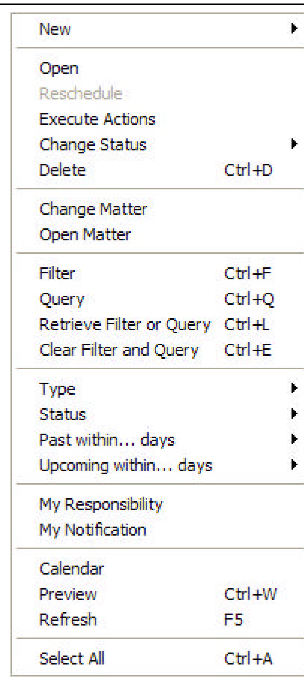
There are 247 Workflow- and Workflow Settings-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

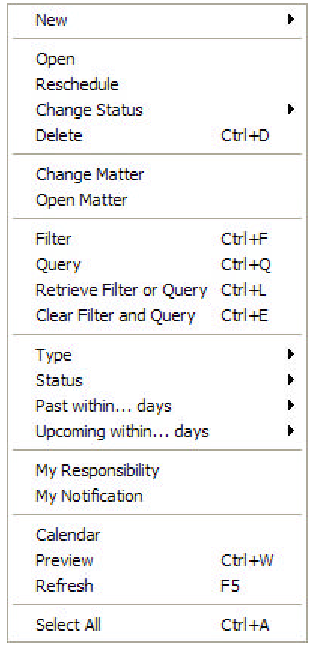
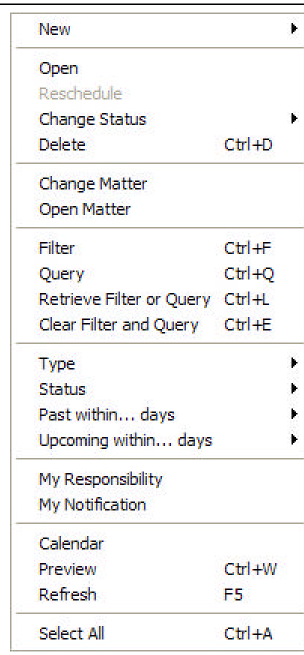
PCR	Description	In Version
7891 and 9291	The defaults for opening the Matter-Workflow listing have been set to the following: • Active Matter • All item types (Appointments, Tasks, Critical Dates, Phone Calls and Court Events) • All staff • Past Within = ALL / Upcoming Within = ALL • Scheduled • Uncompleted (Workflow Status = Not Started or In Progress) The defaults for opening the Matter-Workflow listing have been set to the following: • Matters where the status is not Closed (includes Open and Other) • All item types (Appointments, Tasks, Critical Dates, Phone Calls and Court Events) • Active user based on login, or first member of Staff if the User is not a staff member (based on System Settings) • Past Within = 30 Days / Upcoming Within = 30 Days • Scheduled • Uncompleted (Workflow Status = Not Started or In Progress)	PM87
7924	You can no longer select All personnel if "My Notification" or "My Responsibility" are checked in the workflow filter.	PM87

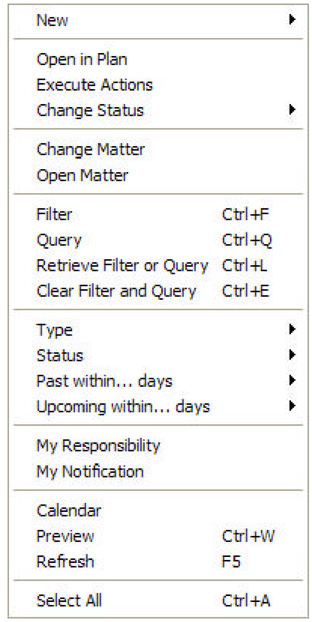
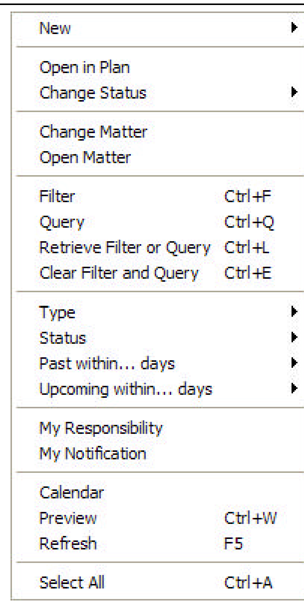
PCR	Description	In Version
8143, 8214, 9018, 9019, 9020, 9409, 9509, and 9672	This release includes general updates to Workflow Plans, as well as Workflow data entry forms, listings, filters, and queries. For more information, see "Changes Specific to Workflow Plans" beginning on page 8-34 and "General Usability Updates to Workflow Data Entry Forms" beginning on page 8-52. Postponement has been changed to Reschedule, as the wording is more appropriate because you can move up or back an Event Date. Postponement usually indicates only moving the Event Date back.	PM87
8305	The Assign Entities window, opened from the Related Entities tab on the Workflow form, respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8536	Workflow Listing respects new All Filter/Query Access Functional Security Option.	PM87
8747	When “Expand workflow plan branch after answering question” is checked in Preferences, the branch after the selected item is expanded automatically up to the next question, or the end of the branch, whichever comes first. When not checked, the branch remains collapsed and must be expanded manually.	PM87
9017	A new option, Add and Start Workflow Plans in One Step, has been has been added to Preferences for adding and starting plans in matters (see "Adding and Starting Plans" beginning on page 8-34).	PM87
9018, 9019 and 9020	You can now do Multi-select on the Workflow Listing, which allows you to change the status in bulk. For example, you can filter the listing on a Friday to show all your appointments for that week, and then select (contiguous or non-contiguous) the appointments, and change their status. So, I might have 20 appointments, of which I want to mark 14 as Held and 6 as Canceled. I can do this very quickly now. Hopefully, this will encourage you to do more "clean-up" now that it is easier. Marking items as complete is also interactive, in that it will cycle through each item, displaying the status change screen for that item, and allowing you to confirm the setting. If you pick 10 items, it will show you the first one, then the second, and so on. This was necessary, and reasonably logical, because there are so many deep-logic dependencies on marking a workflow item completed.	PM87

PCR	Description	In Version
9408	On the Workflow Listing Filter, the Save, Save As and Apply buttons are disabled until enough filter criteria is entered. This includes at least one item selected in the Schedule Group and on item in the Status group.	PM87
9438	If you mark an unscheduled item (Due Date is blank) as completed, the Complete/Held date automatically populates the Due Date field. This is to improve the quality of the data in Workflow Items so that filtering is more accurate.	PM87
9439	Meet/Speak With can now be any entity in the system.	PM87
9546	Workflow item % Complete translates as follows for statuses: • Not Held/Started = 0% • In Progress = 0%, 25%, 50%, or 75% (selectable) • Held/Completed = 100% • Cancelled = 0% If you change the status from In Progress to Not Held/Started or Cancelled, the % Complete is reset to 0%. If you change the status from Completed to Not Held/Started or Cancelled, the % Complete is reset to 0%. If you change any status to Held/Completed, the % Complete is set to 100%.	PM87
4659	When the Workflow Listing quick filter is set to ALL for Staff (Responsible/Notify), unselecting ALL advances the cursor to the Staff look-up field.	PM87 SP1
10110, 11402 and 11952	Workflow Notes and Instructions can now be printed from the Workflow Listing or Calendar. These fields print as “bands” of text below the normal workflow listing report entries. Note that, when these fields are included in the report, you cannot preview the report before printing. This is due to limitations with the report component currently implemented in Practice Manager. Also, if you only include these two fields, which is probably not logical, the report will not print due to the format requiring at least one other identifying record, such as Description.	PM87 SP1
10925	You can now show or hide branches under workflow plan answers that have not been accepted. For more information, see "Show branches for all answers" beginning on page 8-61.	PM87 SP1

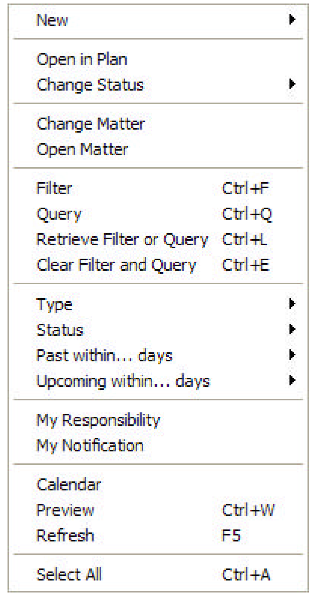
PCR	Description	In Version
10926	When you start a plan, Practice Manager only validates those workflow items in the plan that are located above answers on branches. Items on branches below answers are not validated until the answer is accepted. Note that items above an answer should never be dependent upon values after an answer, especially date fields.	PM87 SP1
11116 and 11409	“Show branches for all answers” (formerly “Show All Paths” in Practice Manager v8.0) functionality has been updated and restored for Practice Manager v8.7 SP1: • This field now appears in Preferences – Workflow and on the Workflow Plan window if the user has “Workflow: Show branches for all answers” assigned to the security role for their active site (see PCR 11120). • When checked, branches appear for all answers, regardless of whether or not they have been accepted. • When not checked, branches only appear for answers that have been accepted. Note that, when the functional security operation is not assigned to the user’s role at their active site, the field does not appear and the functionality is as if the field were not checked.	PM87 SP1
11619, 11838, 11866, and 11899	There have been numerous updates to the workflow listing and calendar filters. For more information, see "Workflow Listing and Calendar Filter Updates" beginning on page 8-26.	PM87 SP1
11482	When a workflow item in a plan does not have items underneath it on the branch, the Delete Item – Shift Branch Up menu items does not appear.	PM87 SP1
11670	When upgrading from previous versions of Practice Manager, workflow items are updated as follows: • If the workflow is marked completed and the completion date is not populated, the Event/Due date is used to populate this field. If there is no Event/Due date, the field remains blank.	PM87 SP1
11673	When an unscheduled workflow is marked as complete, the Event/Due Date is automatically populated with the Completion Date. It is possible to edit the Event/Due Date field, but it cannot be null for completed items.	PM87 SP1
11738	When a plan is marked complete and the user choose options for marking unscheduled and uncompleted items with the select status, items on branches that are hidden under unaccepted answers are automatically updated.	PM87 SP1

<table>
<tr><th>PCR</th><th colspan="2">Description</th><th>In Version</th></tr>
<tr><td rowspan="3">11746</td><td colspan="2">The Workflow Listing and Calendar menus have been updated as follows:</td><td rowspan="3">PM87 SP1</td></tr>
<tr><td>Scheduled – Not Plan Related – Linked Actions – Not Completed</td><td>
</td></tr>
<tr><td>Scheduled – Not Plan Related – Linked Actions – Completed</td><td>
</td></tr>
</table>

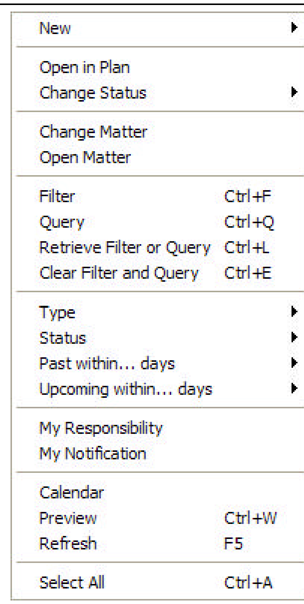
PCR	Description	In Version
	Scheduled – Not Plan Related – No Linked Actions – Not Completed 	
	Scheduled – Not Plan Related – No Linked Actions – Completed 	

PCR	Description	In Version
	Scheduled – Plan Related – Linked Actions – Not Completed 	
	Scheduled – Plan Related – Linked Actions – Completed 	

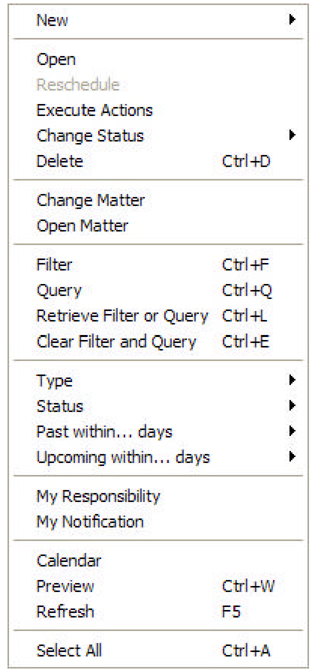
<table>
<tr><th>PCR</th><th>Description</th><th>In Version</th></tr>
<tr><td></td><td>Scheduled – Plan Related – No Linked Actions – Not Completed

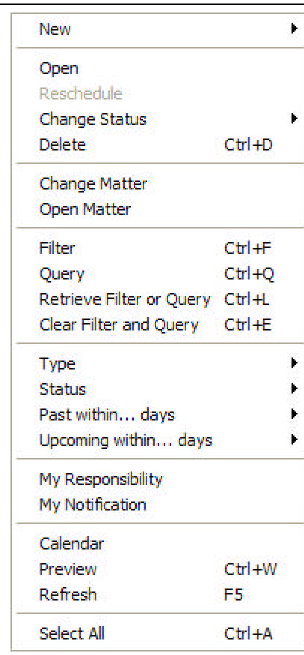


</td><td></td></tr>
<tr><td></td><td>Scheduled – Plan Related – No Linked Actions – Completed

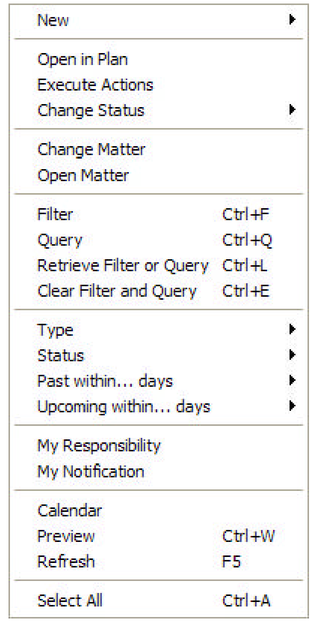
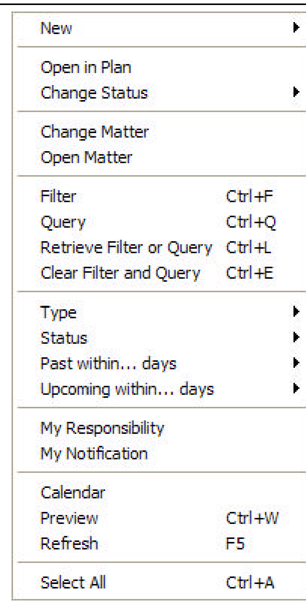


</td><td></td></tr>
</table>

<table>
<tr><th>PCR</th><th>Description</th><th></th><th>In Version</th></tr>
<tr><td></td><td>Unscheduled – Not Plan Related – Linked Actions</td><td>


</td><td></td></tr>
<tr><td></td><td>Unscheduled – Not Plan Related – No Linked Actions</td><td>


</td><td></td></tr>
</table>

PCR	Description		In Version
	Unscheduled – Plan Related – Linked Actions		
	Unscheduled – Plan Related – No Linked Actions		
	The menu functions work as follows: • New – Used for creating a new workflow item (appointment, court event, critical date, phone call, plan or task). • Open – Opens the workflow item.		

PCR	Description	In Version
	• Open in Plan – If the workflow item is part of a plan, this opens the plan with the item highlighted. • Reschedule – If the workflow item is scheduled and not completed or cancelled, this allows a new Event/Due date to be entered, along with a reason for the rescheduling. • Execute Actions – If the workflow item has linked actions, this menu option executes them. • Change Status – Used to change the status of the item, allowing the user to pick from the list of available choices, as well as enter a reason for the status change. • Delete – If the items is not part of a plan, allows the item to be deleted after a confirmation dialog box appears. • Change Matter – Allows the matter of the workflow item to be changed without actually opening the item. • Open Matter – Opens the matter associated with the workflow item. • Filter – Displays the workflow listing/calendar filter form. • Query – Displays the workflow listing/calendar filter form. • Retrieve Filter or Query – Displays a list of saved filters for the listing/calendar. • Clear Filter and Query – Clears any previously applied filter or query, and resets the list or calendar to the default defined in Preferences for the user. • Type – Filters the listing/calendar by the selected types. • Status – Filters the listing/calendar by the selected statuses. • Past within… days – Displays all items where the Event/Due Date is in the past number of days selected. • Upcoming within… days – Displays all items where the Event/Due Date is in the upcoming number of days selected. • My Responsibility – Lists all items where the active user is assigned as Responsible. • My Notification – Lists all items where the active user is assigned as Notify Only.	

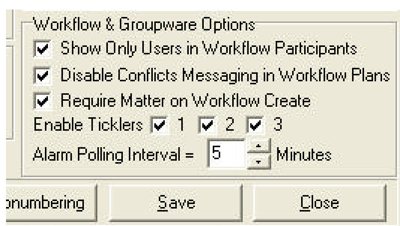
<table>
<tr><th>PCR</th><th>Description</th><th>In Version</th></tr>
<tr><td></td><td>

- Calendar – From the listing, displays the calendar.
- Preview – From the listing, displays a preview of the workflow item notes and entities.
- Refresh – Refreshes the listing/calendar.
- Select All – From the listing, selects all workflow items up to the maximum allowed in System Settings.

</td><td></td></tr>
<tr><td>11840 and 12104</td><td>

In Practice Manager v8.0, there was only one tickler for workflow items. With Practice Manager v8.5 and higher, there are three. And while these two added ticklers provide functionality that some firms need, not all want to use to 3 ticklers for their workflow items. There is also an issue with performance on large databases with a large number of workflow items – the more ticklers that are used, the longer it takes to query the database.

For this reason, new System Settings have been added for Workflow Options that allow firms to enable or disabled ticklers:



- When Ticker 1 is disabled, no tickler fields appear on the workflow data entry forms, listings, or queries. Enable Tickler 2 and 3 fields are disabled, as you must enabled Tickler 1 before enabling Tickler 2 or 3.
- When Ticker 1 is enabled, the Tickler 1 field appears on the workflow data entry, listing and query. The Ticker 2 field on the System Settings window is enabled, but Ticker 3 is disabled, as you must enable Tickler 2 before Tickler 3.

  Note, when converting from Practice Manager v8.0, Tickler 1 is enabled and populated with the ticklers from your workflow items in v8.0.
- When Ticker 2 is enabled, the Tickler 2 field appears on the workflow data entry, listing and query. The Ticker 3 field on the System Settings window is enabled.
- When Ticker 3 is enabled, the Tickler 3 field appears

</td><td>PM87 SP1</td></tr>
</table>

PCR	Description	In Version
	on the workflow data entry, listing and query. Note that, on the workflow data entry form, the ticklers appear from left to right as Tickler 3, Tickler 2 and Tickler 1 – think of this as a countdown to the Event/Due Date.  • Tickler 3 appears on the calendar the number of days entered before the Event/Due Date, but only once. For example, if you enter 14 in this field, a tickler will appear on your calendar 14 days before the Event/Due Date of the item. • Tickler 2 appears on the calendar the number of days entered before the Event/Due Date, but only once. For example, if you enter 7 in this field, a tickler will appear on your calendar 7 days before the Event/Due Date of the item. • Tickler 1 appears on the calendar the number of days entered before the Event/Due Date, and remains on the calendar until the Event/Due Date is reached. For example, if you enter 3 in this field, a tickler will appear on your calendar for each of the 3 days before the Event/Due date.	
11896	Multi-select on the Workflow Listing now supports delete functionality as follows: • Select one or more records on of the listing, and choose Delete. • The Delete Confirmation message appears • Click No to keep the selected record(s) or Yes to proceed with deleting the selected record(s). The system then begins deleting items. When a condition exists that does not allow the record to be deleted, the appropriate message appears once. The answer is then applied to all like conditions. For example, if the record is from another site other than your active site, a message appears advising you that you cannot delete records from that site. This message only appears once during the delete operation, and not each time a record is encountered. When complete, the listing refreshes if Auto refresh is enabled.	PM87 SP1
11997	You can now disable Ticklers 2 and 3 – added in Practice Manager v8.5 – in order to enhance workflow performance with respect to displaying the workflow calendar and desktop views. If your firm does not use ticklers, you can	PM87 SP1

PCR	Description	In Version
	also disable Tickler 1 for even great performance improvement. For more information, see "Enabling and Disabling Ticklers" beginning on page 8-63.	
12005	Numerous changes have been made in the database and to Practice Manager in an effort to enhance the performance of listing workflow items, displaying workflow items on the calendar, and working with workflow plans.	PM87 SP1
12026	The Completed Date cannot be left blank for workflow items where the status is Completed or Cancelled. • When the item is marked Completed or Cancelled, the Completed Date field defaults to today's date, but it can be changed to any date. • When an existing Completed or Cancelled workflow item is opened, and the Completed date is empty because this restriction did not exist in prior versions of Practice Manager, you cannot save the record without populating the Completed field.	PM87 SP1
12033	You can now edit the Status Date and By fields directly on the workflow item data entry form; however, such changes will not be logged in the history table. Only changing the status will do this, as it presents the Status Change dialog box that creates history items.	PM87 SP1
12053	There are only two conditions where a date can populate the Completed Date field: • The workflow item is marked as Completed. • The workflow item is marked as Cancelled. In Practice Manager v8.6 SP2 and earlier, there was no Cancelled status. This means, if the Completed Date field is populated, the status of the item should be completed, but it was not changed as such. As part of the upgrade conversion from Practice Manager v8.6 SP2 or earlier, any workflow item with a Completed Date where the status is not Completed, has its status automatically changed to Completed.	PM87 SP1
12203 and 12211	Assignment of entities to workflow items is controlled by the Show Only Users in Workflow Participants in System Settings. If Show only users in Workflow participants is checked in System Settings, the Assign Entity window functions as follows: • Responsible checked – Available Entities lists only users.	PM87 SP1

PCR	Description	In Version
	• Assigned By checked – Available Entities lists only users. • Meet/Speak With checked – Available Entities lists only users. • Notify Only checked – Available Entities lists only users. • Related To checked – Available Entities lists only users. If Show only users in Workflow participants is not checked in System Settings, the Assign Entity window functions as follows: • Responsible checked – Available Entities lists only users and staff. • Assigned By checked – Available Entities lists only users and staff. • Meet/Speak With checked – Available Entities lists all entities. • Notify Only checked – Available Entities lists all entities, unless Assigned By is also checked, in which case Available Entities lists only users and staff. • Related To checked – Available Entities lists all entities. The Notify Only checkbox has been moved to the right side of the Assign Entity window. The Add Entity window has been renamed as Edit Assignment. If Show only users in Workflow participants is checked in System Settings, the Notify on the workflow listing quick filter functions as follows: • Selected User shows items where the user is a Notify Entity. • All shows all items where users are a Notify Entity. If Show only users in Workflow participants is not checked in System Settings, the Notify on the workflow listing quick filter functions as follows: • Selected User or Staff shows items where the user or staff entity is a Notify Entity. • All shows all items where users or staff are a Notify Entity.	

PCR	Description	In Version
	The lookups on the Filter – Entities tab have also been updated. If Show only users in Workflow participants is checked in System Settings, the Choose Entity window functions as follows: • Responsible checked – Entities lists only users. • Assigned By checked – Entities lists only users. • Meet/Speak With checked – Entities lists only users. • Notify Only checked – Entities lists only users. • Related To checked – Entities lists only users. If Show only users in Workflow participants is not checked in System Settings, the Choose Entity window functions as follows: • Responsible checked – Entities lists only users and staff. • Assigned By checked – Entities lists only users and staff. • Meet/Speak With checked – Entities lists all entities Note that this listing used to only show entities that had been assigned to workflow items as the Meet/Speak with entity; however, we have removed this restriction as we are somewhat concerned about the performance of generating this list on large databases. If a user is not assigned to a workflow item as the Meet/Speak With entity, then no records are returned. • Notify Only checked – Entities lists all entities. Note that this listing used to only show entities that had been assigned to workflow items as the Notify Only entity; however, we have removed this restriction as we are somewhat concerned about the performance of generating this list on large databases. If a user is not assigned to a workflow item as the Notify Only entity, then no records are returned. • Related To checked – Entities lists all entities. Note that this listing used to only show entities that had been assigned to workflow items as the Related To entity; however, we have removed this restriction as we are somewhat concerned about the performance of generating this list on large databases. If a user is not assigned to a workflow item as the Related To entity, then no records are returned.	

PCR	Description	In Version
12285	The following columns have been added to the Workflow listing: • Responsible Names • Assigned By Names • Meet/Speak With Names • Related To Names • Notify Only Names These fields contain lists of those entities assigned to a workflow item with the corresponding role. The values used for the names are the composite entity names, separated by semi-colons (;).	PM87 SP1
12453	When converting workflow activity templates from PM v8.0 to this release, the Description value from the PM v8.0 template populates both the Title and Description fields in this release.	PM87 SP1
12457	If there is a failure when starting a plan, it was possible in earlier releases that some plan items are inserted, but not all. In this case, the status of the plan would still be not started, but you would be able to expand the plan and see the items that were inserted. If you then chose to start the plan, the items that had been previously inserted were duplicated. With this release, Practice Manager checks all plans when the Plan tab is displayed. If there are plans with workflow items that have not been started, those items are deleted. Starting the plan inserts all items again.	PM87 SP1
11879, 13383, and 13658	A new runtime utility has been added for that automatically deletes branches under unaccepted answers in workflow plans, thereby removing unnecessary records from the Practice Manager database. When a plan is marked complete, an additional dialog box appears after they have indicated how to handled unscheduled and in progress or not started items. This dialog box reads as follows: The plan may also contain branches of items under answers that were not accepted. Practice Manager can delete the branches under these answers if none of the items are marked complete. Choosing Yes schedules the plan to be “cleaned up” in the background. There is no additional action required on the part of the user.	PM87 SP2
1623	The Preview checkbox has been added to the Workflow Listing Filter.	PM87 SP2

PCR	Description	In Version
13274	Workflow templates now respect the same tickler options from System Settings as the workflow data entry forms.	PM87 SP2

Changes Specific to the Workflow Listing

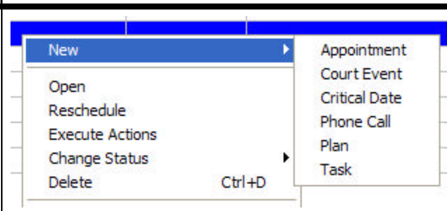
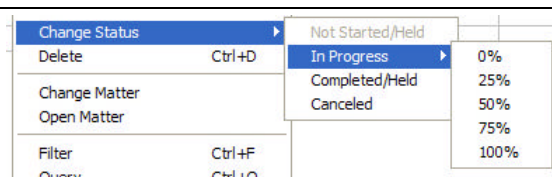
Workflow Listing Changes – Menu Updates

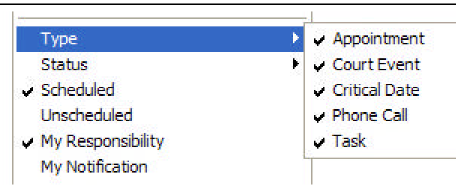
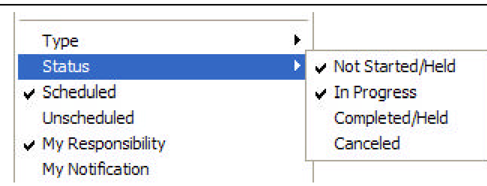
PCR 9018, 9019 and 9020

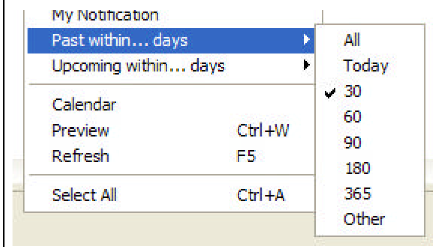
Workflow Listing menus have been updated to provide more clear and relevant options.

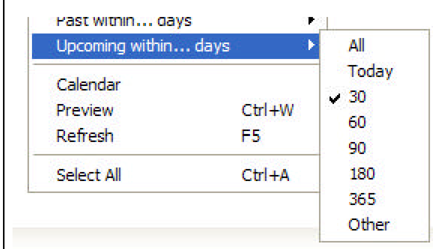
Menu Items Common to All Workflow Items

The following menu items are common to all menus:

Right-click on…	Resulting Menu
New	 Allows you to create a new workflow item of the type selected from the submenu.
Open / Open in Plan	Allows you to open the workflow item. This option is not available if more than one workflow item is selected. If the menu item is labeled Open in Plan, the plan opens with the workflow item highlighted.
Change Status	 Allows you to change the status of the workflow item from the list of values on the submenu. When you choose a new status, the Status Change dialog appears. This option is available if you select more than one workflow item. For each item you select, the Change Status dialog box will appear.

Right-click on…	Resulting Menu
Change Matter	Allows you to choose a different matter for the workflow item. This option is available if you select more than one workflow item, and will change the matter in all workflow items after confirmation.
Open Matter	Opens the parent matter for the workflow item.
Filter (Ctrl + F)	Opens the Workflow Listing Filter window.
Query (Ctrl + Q)	Opens the Workflow Listing Query window.
Retrieve Filter or Query (Ctrl + L)	Allows you to select from a list of saved filters or queries, applying the selected item to the Workflow Listing.
Clear Filter and Query (Ctrl + E)	Clears the currently applied filter/query criteria, and resets the Workflow Listing to its default set of records.
Type	 Allows you to select which types of workflow items you want to include on the Workflow Listing (this is the same functionality as the checkboxes on the quick filter). A checked menu item means it is included, and an unchecked menu item means it is not included. Clicking an item switches between checked and unchecked. You can select all values or no values.
Status	 Allows you to select which workflow item statuses you want to include on the Workflow Listing. A checked menu item means it is included, and an unchecked menu item means it is not included. Clicking an item switches between checked and unchecked. You can select all values or no values.
My Responsibility	Filters the list to include workflow items where the active user is assigned as the responsible.
My Notification	Filters the list to include workflow items where the active user is assigned as notify.
Past within… days	Allows you to select from a submenu the age, in number of days, of the oldest item you want to include on the workflow

<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td></td><td>listing, base on Due/Event Date.


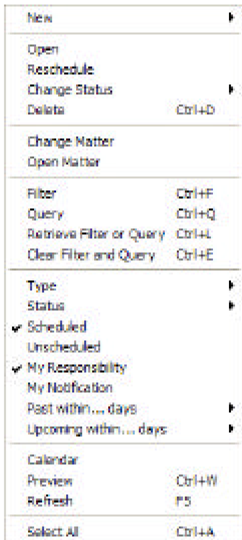
Clicking an item switches between checked and unchecked. You can select only one value.
Choosing All shows all items in the past.
Choosing Today limits the past to today.
Choosing Other allows you to enter a specific number of days into the past.
</td></tr>
<tr><td>Updating within… days</td><td>Allows you to select from a submenu the age, in number of days, of the latest item you want to include on the workflow listing, base on Due/Event Date.


Clicking an item switches between checked and unchecked. You can select only one value.
Choosing All shows all items in the future.
Choosing Today limits the future to today.
Choosing Other allows you to enter a specific number of days into the future.
</td></tr>
<tr><td>Calendar</td><td>Switches to calendar view.</td></tr>
<tr><td>Preview
(Ctrl + W)</td><td>Displays the Preview panel at the bottom of the listing where you can read the notes from the workflow item, as well as see a list of entities assigned to the item.</td></tr>
<tr><td>Refresh
(F5)</td><td>Refreshes the listing.</td></tr>
<tr><td>Select All
(Ctrl + A)</td><td>Selects all records in the listing, based on the currently applied filter.</td></tr>
</table>

Menus for Workflow Items, Not in Plans, with No Linked Actions

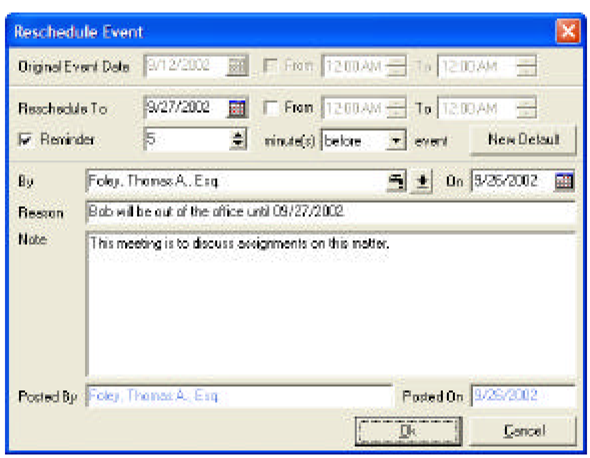
The following menu appears when you highlight a workflow item that has the following properties:

- It is not part of a plan
- It has no linked actions



The following items are unique to this menu:

- Reschedule opens up the Reschedule Event dialog, allowing you to change the Due/Event Date.



This option is not available if more than one workflow item is selected.

- Delete (Ctrl+D) allows you to delete the workflow item. This option is available if you select more than one workflow item, and will delete all items after confirmation.

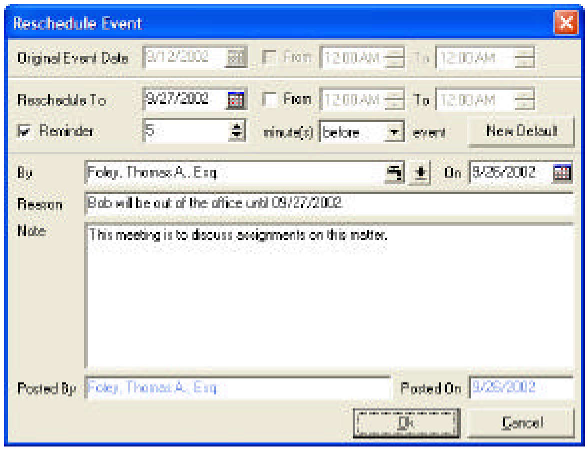
Menus for Workflow Items, Not in Plans, with Linked Actions

The following menu appears when you highlight a workflow item that has the following properties:

- It is not part of a plan
- It has linked actions

The following items are unique to this menu:

- Reschedule opens up the Reschedule Event dialog, allowing you to change the Due/Event Date.



  This option is not available if more than one workflow item is selected.

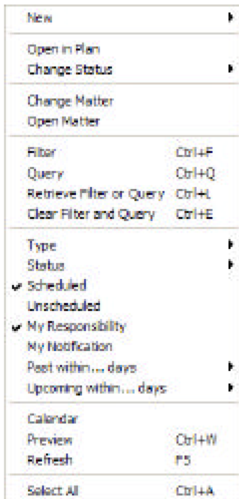
- Execute Actions executes the action linked to the workflow item. Dialogs and windows, as needed, appear for each linked action.

- Delete (Ctrl+D) allows you to delete the workflow item. This option is available if you select more than one workflow item, and will delete all items after confirmation.

Menus for Workflow Items, in Plans, with No Linked Actions

The following menu appears when you highlight a workflow item that has the following properties:

- It is part of a plan
- It has no linked actions



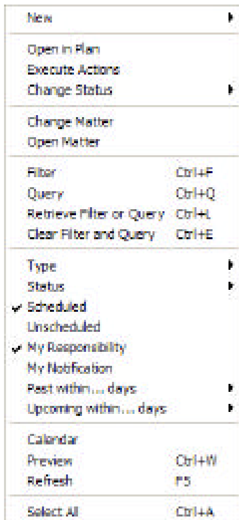
This menu has no items that are unique to it. It does not include the following items found on a menu that is not part of a plan:

- Delete
- Reschedule

Menus for Workflow Items, in Plans, with No Linked Actions

The following menu appears when you highlight a workflow item that has the following properties:

- It is part of a plan
- It has linked actions



This menu has no items that are unique to it. It does not include the following items found on a menu that is not part of a plan:

- Delete
- Reschedule

Workflow Listing Changes – Available Fields

PCR 9018, 9019 and 9020

The following fields have been added as Available Fields on the Workflow Listing (* indicates fields which are also available from the right-click menu)

Field Name	Data Source
% Complete	This is the percent complete value from the workflow item. This field is new in these three releases of Practice Manager.
Status	This is the status of the workflow item.

The following fields were renamed on the list of Available Fields for the Workflow Listing:

Original Field Label	New Field Label
Progress	Reason
Postponed	Rescheduled

Workflow Listing Update – Filter

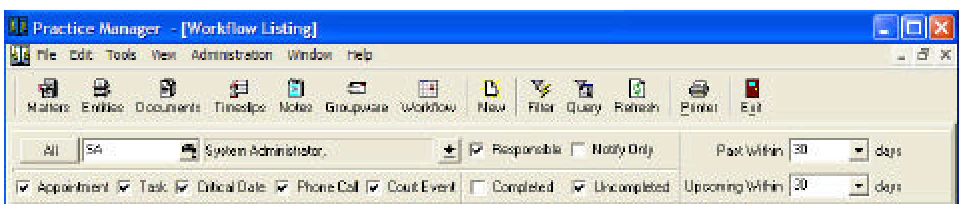
PCR 9018, 9019, 9020 and 9409

Workflow Listing and Calendar Filter Updates

There have been numerous changes to the filtering of the workflow listing and calendar, with a focus on making the usage more intuitive and reflect "real-world" usage as recommended by existing Practice Manager clients.

Quick Filter

The functionality of the Quick Filter on the Workflow Listing has been updated as follows:



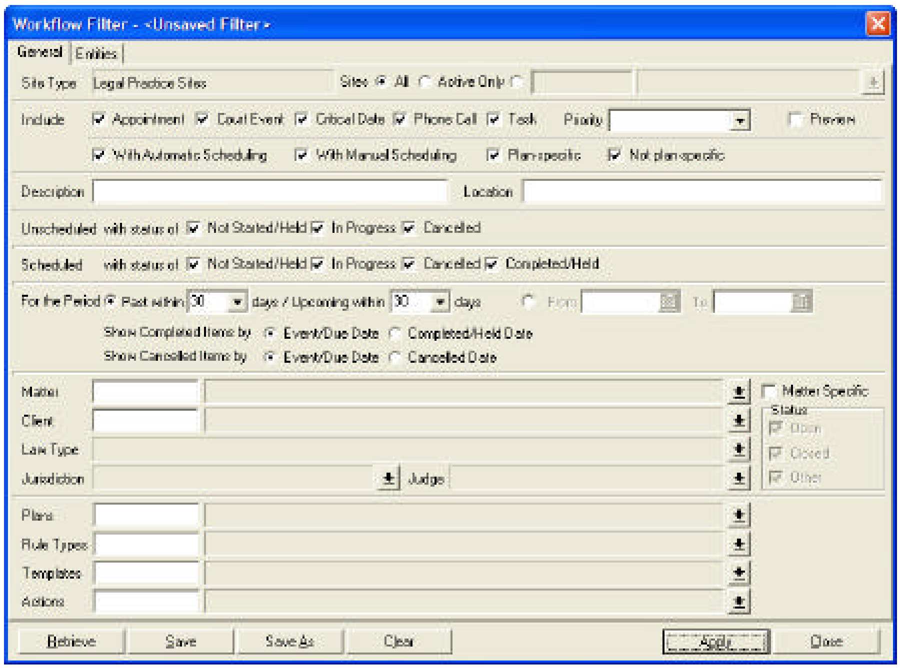
- ➢ Choose ALL shows workflow items for all Staff entities as follows:
  - If Responsible is checked, where a Staff member is a Responsible entity.
  - If Notify Only is checked, where a Staff member is a Notify Only entity.
- ➢ If no items – Appointment, Court Event, Critical Date, Phone Call and Task – are checked, the list is empty.
- ➢ Checking Completed in the Quick Filter is the same as choosing the following in the Hot Filter:
  - Scheduled – Completed/Held
- ➢ Checking Uncompleted in the Quick Filter is the same as choosing the following in the Hot Filter:

- Scheduled – Not Started/Held and In Progress

Hot Filter

We have done a complete "makeover" of the Workflow Listing Hot Filter:

➢ We have provide many more filtering options, including the ability to show items based only the following:



- Items with Automatic Scheduling (Uses would include unchecking this field when you are looking to do a mass update on your calendar for unscheduled items, as these will become scheduled when the preceding condition is met.)
- Items with Manual Scheduling
- Items that are Plan-specific (Again, when doing "clean-up" you might not want to show Plan-specific items.)
- Items that are Not Plan-specific
- Items that are matter-specific only (depends on System Setting)
- Items where the parent matter status is Closed (helps with clean-up)
- Items where the parent matter status is Open
- Items where the parent matter status is Other

- Site filtering has also been improved.
- The fields on this form impact the listing as follows:

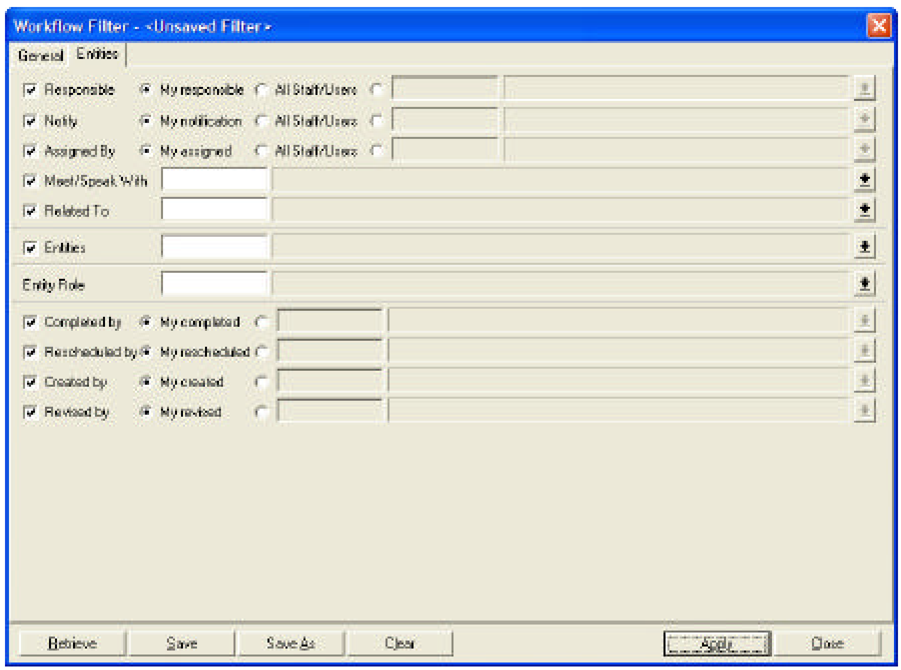
This field…	Filters the list by this workflow property…
Actions	Includes items with the selected actions (default = blank)
Client	Includes items from matters for the selected clients (default = blank)
Description	Search for items based on text entered. Accepts wildcard characters.
Include – none selected	Show no workflow items.
Include – Appointments	Includes appointments in the listing (default = checked)
Include – Court Event	Includes court events in the listing (default = checked)
Include – Critical Date	Includes critical dates in the listing (default = checked)
Include – Phone Call	Includes phone calls in the listing (default = checked)
Include – Tasks	Includes tasks in the listing (default = checked)
Include – Not plan-specific	Includes items that are not part of plans (default = checked)
Include – Plan-specific	Includes items that are part of plans (default = checked)
Judge	Includes court events for the selected judges (disabled if court event is not selected – default = blank)
Jurisdiction	Includes items from the selected jurisdictions (disabled if court event is not selected – default = blank)
Law Type	Includes items from matters of the selected law types (default = blank)
Location	Search for items based on text entered. Accepts wildcard characters.
Matter	Includes items for the selected matters (default = blank from global / default = active matter from matter-workflow listing)
Matter-specific	Only includes items that have a parent matter (default = unchecked from global / default = checked from matter-workflow listing)
Matter Status – Closed	Includes items from matters with a Closed status
Matter Status – Open	Includes items from matters with an Open status

This field…	Filters the list by this workflow property…
Matter Status – Other	Includes items from matters with an Other status
Plans	Includes items from the selected plans (enabled only if plan-specific is selected - default = blank)
Preview	Includes a preview of the item on the listing (default = none)
Priority	Includes items of the selected priority (default = none)
Rules Types	Includes items of the selected rule types (default = blank)
Scheduled with status of – Cancelled	Includes items with a status of Cancelled where the Event/Due Date field is not blank. Note that the Completed Date will be the date the item was cancelled. You can choose to list these items by Event/Due Date or by Cancelled Date.
Scheduled with status of – Completed	Includes items with a status of Cancelled where the Event/Due Date field is not blank. Note that the Completed Date will be the date the item was completed. You can choose to list these items by Event/Due Date or by Completed Date.
Scheduled with status of – In Progress	Includes items with a status of In Progress where the Event/Due Date field is not blank.
Scheduled with status of – Not Started/Held	Includes items with a status of Not Started/Held where the Event/Due Date field is not blank.
Site – Active Only	Includes items only from the active site selected at login.
Site – All	Includes items from all sites of the selected Site Type (this is the default – respects Site Security, if enabled)
Site – Selected	Allows the user to select one or more sites from the selected Site Type on which to filter the listing (respects Site Security, if enabled)
Site Type	This is the Site Type selected at login (read-only).
Templates	Includes items based on the selected templates (default = blank)
Unscheduled with status of – Cancelled	Includes items with a status of Cancelled where the Event/Due Date field is blank. Note that the Completed Date will be the date the item was cancelled. You can choose to list these items by Event/Due Date or by Cancelled Date.
Unscheduled with status of – In Progress	Includes items with a status of In Progress where the Event/Due Date field is blank.

This field…	Filters the list by this workflow property…
Unscheduled with status of – Not Started/Held	Includes items with a status of Not Started/Held where the Event/Due Date field is blank.
With Automatic Scheduling	Includes items that have automatic scheduling configured (default = checked)
With Manual Scheduling	Includes items that have manual scheduling configured (default = checked)
For the period – Past within ### days / Upcoming with ### days	This displays all items with the selected statuses in the ### days before today's days and in the upcoming ### days (the default is 30/30). • Not Held/Scheduled items are always listed by Event/Due Date. • In Progress items are always listed by Event/Due Date. • Completed/Held items can be listed by Event/Due Date (default) or Completed/Held Date. • Cancelled items can be listed by Event/Due Date (default) or Cancelled Date.
For the period – From / To	This displays all items with the selected statuses in the selected date range. • Not Held/Scheduled items are always listed by Event/Due Date. • In Progress items are always listed by Event/Due Date. • Completed/Held items can be listed by Event/Due Date (default) or Completed/Held Date. • Cancelled items can be listed by Event/Due Date (default) or Cancelled Date.
Show Completed Items by – Event/Due Date	When selected (default), completed items are listed by the Event/Due Date.
Show Completed Items by – Completed/Held Date	When selected, completed items are listed by the Completed Date. Please note that, on some systems with a large number of users and a large number of records, performance associated with displaying the listing or calendar may be less than when the Event/Due Date option is selected.
Show Cancelled Items by – Event/Due Date	When selected (default), cancelled items are listed by the Event/Due Date.

This field…	Filters the list by this workflow property…
Show Cancelled Items by – Cancelled Date	When selected, cancelled items are listed by the Cancelled Date. Please note that, on some systems with a large number of users and a large number of records, performance associated with displaying the listing or calendar may be less than when the Event/Due Date option is selected.

➢ We have placed all Entity-related filtering on a separate tab to provide room for the added options on the General page, and to add more entity filtering options.



The fields on this form impact the listing as follows:

This field…	Filters the list by this workflow property…
Assigned By	When checked, filters on assigned by entities (default = blank).
Assigned By	My Notify : Includes items where the active user is the assigned by (default Assigned By when is checked).
Assigned by	When checked, filters on assigned by entities (default = unchecked)

This field…	Filters the list by this workflow property…
Assigned By – All Staff/Users	Includes items for all staff and users based on Assigned By.
Assigned by – My completed	Includes items assigned by the active user (default, when checked)
Assigned By - selected	Includes items for selected entities based on assigned by (blank, when selected). If blank, search results include all records where there is no assign by entity.
Assigned by – selected	Includes items assigned by the selected entities (blank, when selected – staff/users only)
Completed by	When checked, filters on completed by entities (default = unchecked).
Completed by – My completed	Includes items completed by the active user (default, when checked).
Completed by – selected	Includes items completed by the selected entities (blank, when selected)
Created by	When checked, filters on created by entities (default = unchecked)
Created by - My completed	Includes items created by the active user (default, when Created by is checked)
Created by – selected	Includes items created by the selected entities (blank when selected – staff/users only)
Entities	When checked, filters on entities (default = blank). If blank, search results include all records where there are no entities assign.
Entity Role	Includes items where an entity is included with the selected role (default = unchecked).
Meet/Speak With – Selected	Includes items where the selected entities are the meet/speak with entity (default = blank). If blank, search results include all records where there is no meet/speak with entity.
Notify	When checked, filters on notify entities (default = unchecked).
Notify – All Staff/Users	Includes items for all staff and users based on notify.
Notify – My Notify	Includes items where the active user is the notify (default when Notify is checked).
Notify – Selected	Includes items for selected entities based on notify (blank, when selected). If blank, search returns all records where there is no notify entity.

This field…	Filters the list by this workflow property…
Related To – Selected	Includes items where the selected entities are the related to entity (default = blank). If blank, search results include all records where the is no related to entities.
Rescheduled by	When checked, filters on rescheduled by entities (default = not checked)
Rescheduled by – My completed	Includes items rescheduled by the active user (default, when checked)
Rescheduled by – selected	Includes items rescheduled by the selected entities (blank, when selected – staff/users only)
Responsible	When checked, filters on responsible entities (default = checked).
Responsible – All Staff/Users	Includes items for all staff and users based on responsible.
Responsible – My Responsible	Includes items where the active user is the responsible (default when Responsible is checked).
Responsible – selected	Includes items for selected entities based on responsible (blank, when selected). If blank, search returns all records where there is no responsible.
Revised by	When checked, filters on revised by entities (default = unchecked)
Revised by – My completed	Includes items revised by the active user (default, when Revised by is checked)
Revised by – selected	Includes items revised by the selected entities (blank, when selected – staff/users only)

Workflow Listing Changes – Query

PCR 9018, 9019 and 9020

The following fields have been added to the Workflow Listing Query as available fields on which to search:

Field Name	Data Source
% Complete	This is the percent complete value from the workflow item. This field is new in these three releases of Practice Manager.
Law Type	This is the Law Type from the parent matter of the workflow item.

Field Name	Data Source
Matter No.	This is the Matter Number from the parent matter of the workflow item.
Status	This is the status of the workflow item.

The following fields were renamed on the list of Available Fields for the Workflow Listing:

Original Field Label	New Field Label
Progress	Reason
Postponed	Rescheduled

Changes Specific to Workflow Plans

Adding and Starting Plans

PCR 9017

A new option, Add and Start Workflow Plans in One Step, has been has been added to Preferences.

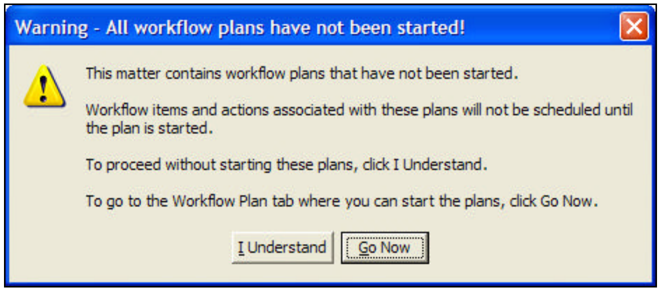
- With this option checked, workflow plans added to a matter are automatically started. This is especially convenient if you are responsible for both inserting the plans and starting them. Keep in mind that starting a plan often takes much longer than inserting one, as Practice Manager has to scan through the plan to determine if any actions should be carried out.

- When this option not check, workflow plans are not started when they are added to a matter; instead, the starting process is carried out through a right-click menu item.

Once a plan is started, a green arrow appears to the left of it as indicated in the above image.

This is especially convenient for those who are only responsible for inserting plans into a matter, and are not actually responsible for starting them.

If the matter contains plans which have been added but not started, a dialog box appears when you open the matter, warning you that this condition exists.

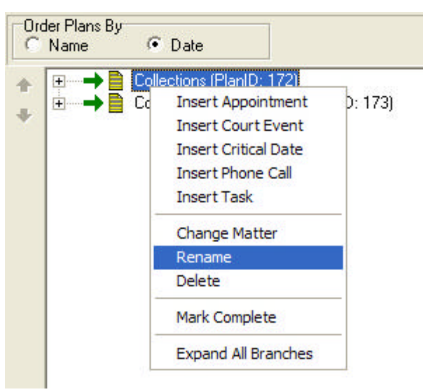


- Clicking I Understand continues to open the matter.
- Clicking Go Now opens the matters and takes you to the Workflow – Plans tab.

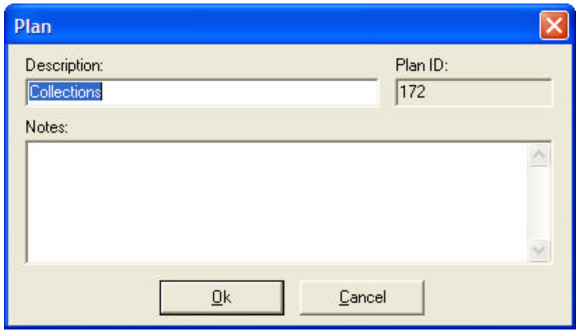
Workflow Plans Can Now Be Renamed

PCR 9007

Workflow plans can now be renamed. To carry this out, simply right-click on the workflow plan, and choose Rename from the menu.



A form appears that allows you to enter a new description, as well as notes, for the plan.

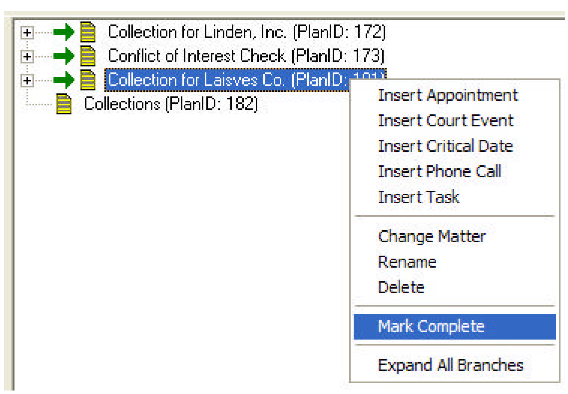


- Clicking OK renames the plan and saves the notes.
- Clicking Cancel returns you to the Plan tab without renaming the plan or saving the notes.

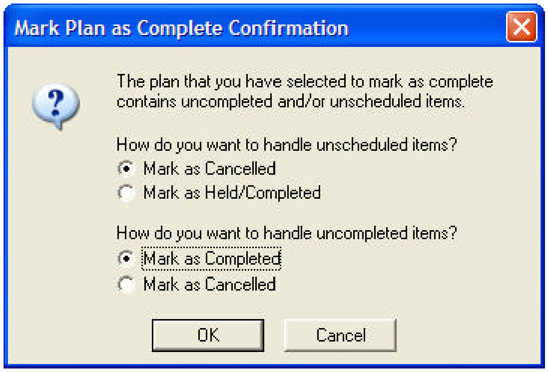
Plans Can Now Be Marked Complete

PCR 9018, 9019 and 9020

You can now Mark a Plan Complete from the right-click menu of a started plan.



When you mark a plan complete, Practice Manager asks you what status you want to use for any Unscheduled and/or Uncompleted Items, including Canceling or Marking as Complete or not changing, which would then require manual updating. This allows for a bulk updating of all the Unscheduled and/or Uncompleted items in the plans, where the items in the plan will probably never need to be completed. This greatly reduces the number of items on the Workflow listing that would appear as Overdue or Unscheduled or Not Completed.



- Unscheduled Items that are not completed can be handled in one of two ways:

  - You can have them all marked as Cancelled

    If you select this option, Practice Manager will go through all unscheduled items in the plan and change the status to Cancelled, with a % Complete of “0”.

  - You can have them all marked as Held/Completed

    If you select this option, Practice Manager will go through all unscheduled items in the plan and change the status to Held/Completed, with a % Complete of “100”.

    Note that you may be prompted to execute linked actions that are dependent upon items being completed.

- Scheduled, but uncompleted items, can be handled in one of two ways:

  - You can have them all marked as Held/Completed

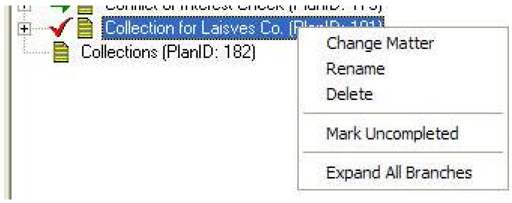
    If you select this option, Practice Manager will go through all unscheduled but uncompleted items in the plan and change the status to Held/Completed, with a % Complete of “100”.

    Note that you may be prompted to execute linked actions that are dependent upon items being completed.

  - You can have them all marked as Cancelled

    If you select this option, Practice Manager will go through all scheduled but uncompleted items in the plan and change the status to Cancelled, with a % Complete of “0”.

Once you mark a complete completed, a red checkmark appears to the left of, replacing the green arrow.



Workflow Plan Menu Updates

PCR 9018, 9019 and 9020

Workflow Plan menus have been updated to provide more clear and relevant options.

<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td>Main Plan window</td><td>

Add Plan allows you to add a plan to the matter. Whether that plan is started or not depends on the setting in Preferences.
Mark All Plans Complete allows you to mark all started plan as being complete, giving you the option of updating the status of all workflow items in the plans to cancelled or held/completed.
Expand All Plan Branches expands all branches in all plans.
Collapse All Plan Branches collapses all branches in all plans back down to just the top-level plan description.
</td></tr>
<tr><td>Inactive Plans (Not Started)</td><td>

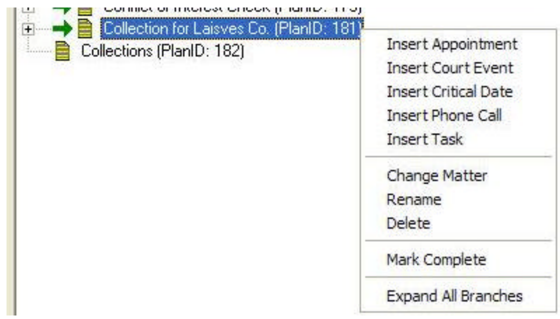
Start Plan allows you to start a plan that has been added to the matter but not started.
</td></tr>
</table>

<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td></td><td>

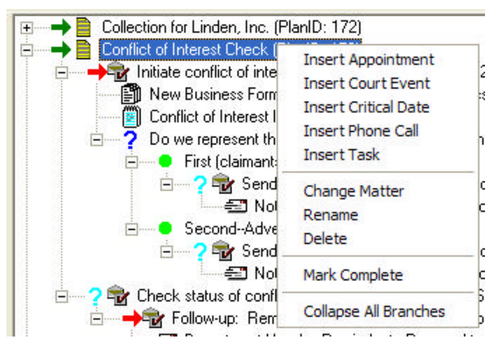
- Change Matter allows you to select a different matter for the plan, moving the plan from the active matter to the selected matter.
- Rename allows you to rename an existing plan.
- Delete allows you to delete the plan.

</td></tr>
<tr><td>Active Plans (Started)</td><td>

Menu for collapsed active plans:



Menu for expanded active plans:



- Insert Appointment is used to insert a new appointment into the plan at the top level.
- Insert Court Event is used to insert a new court event into the plan at the top level.
- Insert Critical Date is used to insert a new critical date into the plan at the top level.
- Insert Phone Call is used to insert a new phone call into the plan at the top level.
- Insert Task is used to insert a new task into the plan at the top level.
- Change Matter allows you to select a different matter for the plan, moving the plan from the active matter to the selected matter.

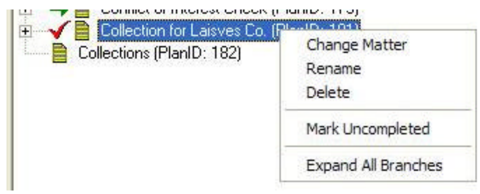
</td></tr>
</table>

<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td></td><td>

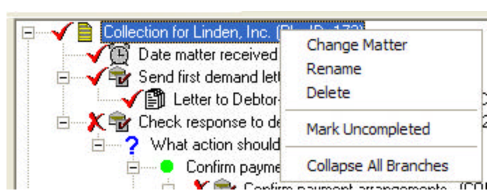
- Rename allows you to rename an existing plan.
- Delete allows you to delete the plan.
- Mark Complete allows you to mark a started plan as being complete, giving you the option of updating the status of all workflow items in the plan to cancelled or held/completed.
- Collapsed Plans – Expand All Branches expands all branches in the plan.
- Expanded Plans – Collapse All Branches collapses all branches in the plan back down to the top-level plan description.

</td></tr>
<tr><td>Completed Plans</td><td>

Menu for collapsed completed plan:



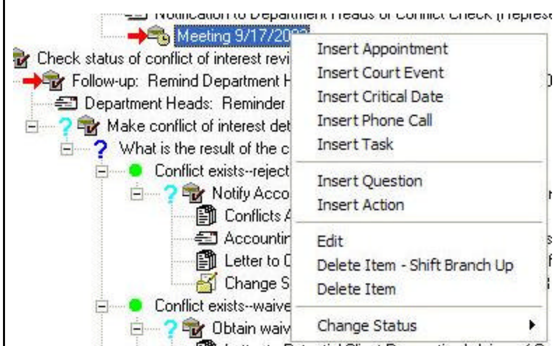
Menu for expanded completed plan:



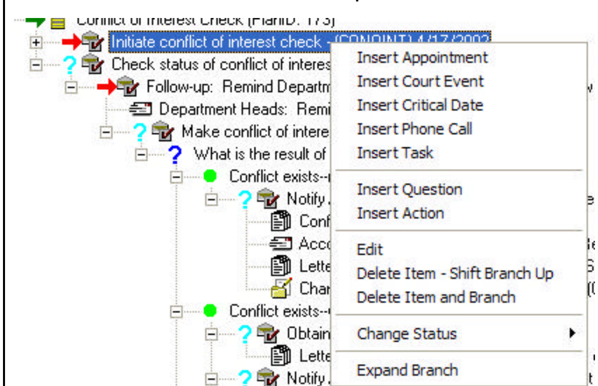
- Change Matter allows you to select a different matter for the plan, moving the plan from the active matter to the selected matter.
- Rename allows you to rename an existing plan.
- Delete allows you to delete the plan.
- Mark Uncompleted allows you to mark a completed plan as being uncompleted. Keep in mind, however, if you marked all the items in the plan as completed or cancelled or a combination of both, those will not be reversed to their original state.
- Collapsed Plans – Expand All Branches expands all branches in the plan.
- Expanded Plans – Collapse All Branches collapses all branches in the plan back down to the top-level plan description.

</td></tr>
</table>

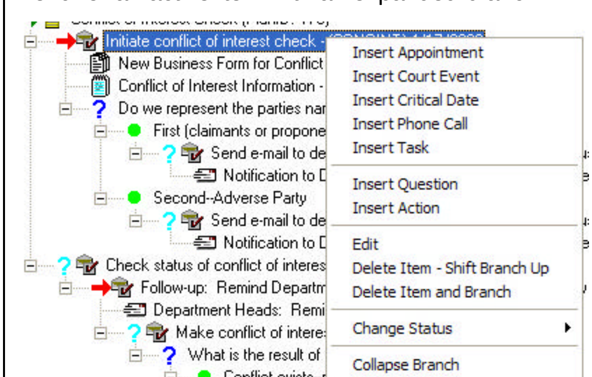
<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td>Active Workflow Items in Plans</td><td>
Menu for active item with no branch:



Menu for active item with a collapsed branch:



Menu for an active item with an expanded branch:



- Insert Appointment is used to insert a new appointment into the plan after the selected item.
- Insert Court Event is used to insert a new court event into the plan after the selected item.
</td></tr>
</table>

<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td></td><td>

Insert Critical Date is used to insert a new critical date into the plan after the selected item.
Insert Phone Call is used to insert a new phone call into the plan after the selected item.
Insert Task is used to insert a new task into the plan after the selected item.
Insert Question is used to insert a new question into the plan after the selected item.
Insert Action is used to insert a new linked action into the plan for the selected item.
Edit opens the workflow item data entry form.
Delete Item – Shift Branch Up deletes the item, as well as any linked actions for that item, and then shifts any remaining items up the branch to be linked to the item the deleted item was linked to.

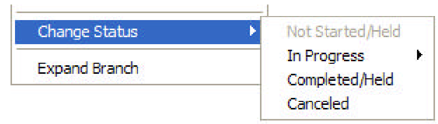
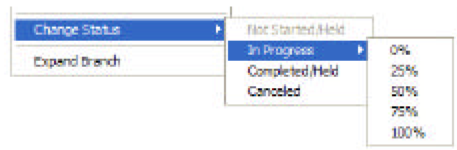
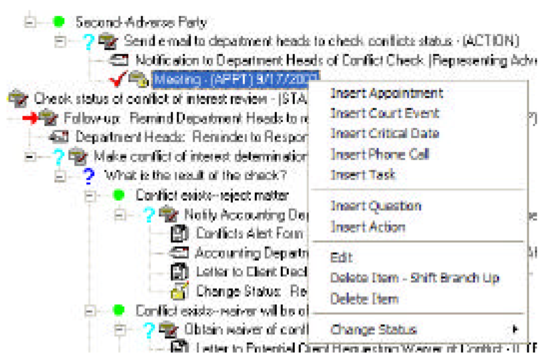
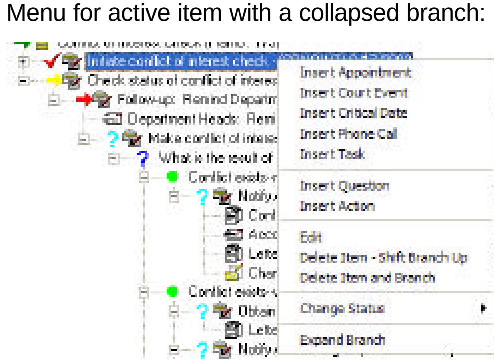
For example, if the branch appears as follows:
ItemA
– itemB
– Action1
– Action2
– itemC
– itemD

deleting ItemB would produce the following:
ItemA
– itemC
– itemD
Delete Item and Branch deletes the current item, as well as any linked actions for that item, and then deletes the branch under the item.

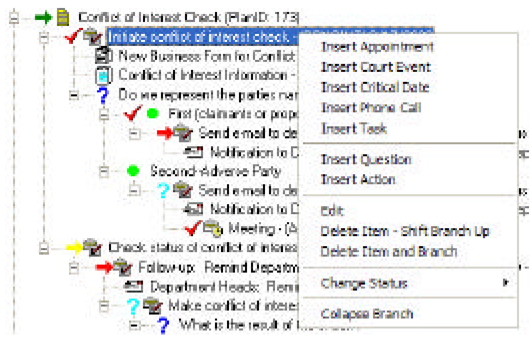
For example, if the branch appears as follows:
ItemA
– itemB
– Action1
– Action2
– itemC
– itemD

deleting ItemB would produce the following:
ItemA

</td></tr>
</table>

Right-click on…	Resulting Menu
	• Change Status allows you to change the status of the item from a submenu:  If you choose In Progress, you can also choose one of the five pre-defined % Complete values:  • Collapsed Items – Expand Branch expands the branch after the item. • Expanded Items – Collapse Branch collapses the branch down to just the selected item.
Completed Workflow Items in Plans	Menu for active item with no branch:  Menu for active item with a collapsed branch: 

Right-click on…	Resulting Menu
	Menu for an active item with an expanded branch:



- Insert Appointment is used to insert a new appointment into the plan after the selected item.
- Insert Court Event is used to insert a new court event into the plan after the selected item.
- Insert Critical Date is used to insert a new critical date into the plan after the selected item.
- Insert Phone Call is used to insert a new phone call into the plan after the selected item.
- Insert Task is used to insert a new task into the plan after the selected item.
- Insert Question is used to insert a new question into the plan after the selected item.
- Insert Action is used to insert a new linked action into the plan for the selected item.
- Edit opens the workflow item data entry form.
- Delete Item – Shift Branch Up deletes the item, as well as any linked actions for that item, and then shifts any remaining items up the branch to be linked to the item the deleted item was linked to.

  For example, if the branch appears as follows:
  ItemA
  – itemB
  – Action1
  – Action2
  – itemC
  – itemD

  deleting ItemB would produce the following:
  ItemA
  – itemC
  – itemD

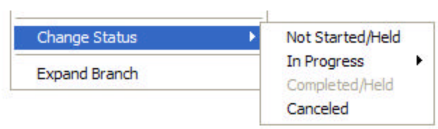
<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td></td><td>

- Delete Item and Branch deletes the current item, as well as any linked actions for that item, and then deletes the branch under the item.

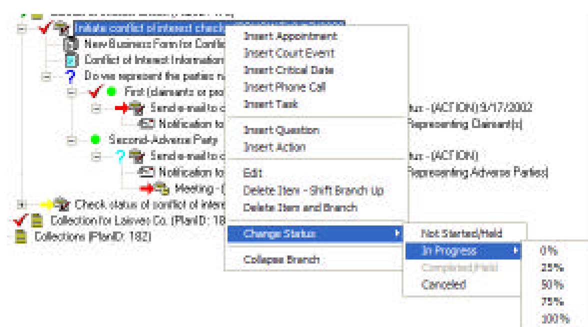
  For example, if the branch appears as follows:
  ItemA
  – itemB
  – Action1
  – Action2
  – itemC
  – itemD

  deleting ItemB would produce the following:
  ItemA

- Change Status allows you to change the status of the item from a submenu:



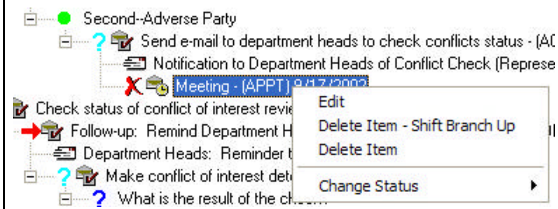
  If you choose In Progress, you can also choose one of the five pre-defined % Complete values:



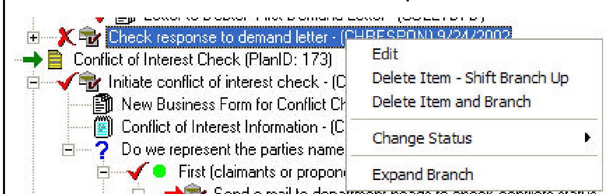
- Collapsed Items – Expand Branch expands the branch after the item.
- Expanded Items – Collapse Branch collapses the branch down to just the selected item.

</td></tr>
</table>

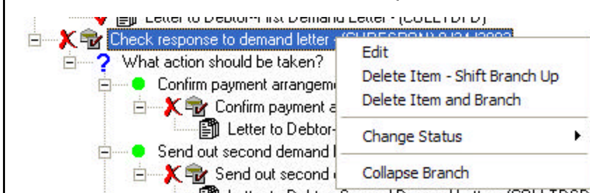
<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td>Cancelled Workflow Items in Plans</td><td>
Menu for cancelled items:



Menu for cancelled items with a collapsed branch:



Menu for cancelled items with an expanded branch:



Edit opens the workflow item data entry form.
Delete Item – Shift Branch Up deletes the item, as well as any linked actions for that item, and then shifts any remaining items up the branch to be linked to the item the deleted item was linked to.

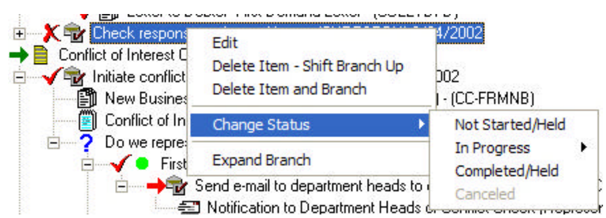
For example, if the branch appears as follows:
ItemA
– itemB
– Action1
– Action2
– itemC
– itemD

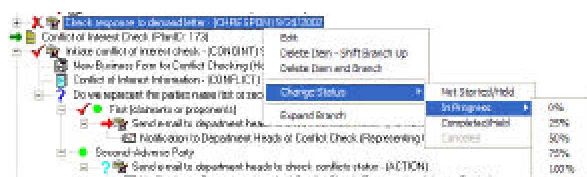
deleting ItemB would produce the following:
ItemA
– itemC
– itemD
Delete Item and Branch deletes the current item, as well as any linked actions for that item, and then deletes the branch under the item.

</td></tr>
</table>

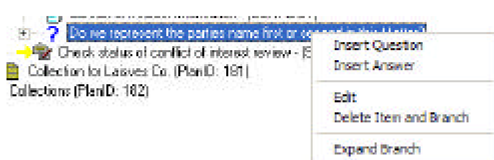
<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td></td><td>
For example, if the branch appears as follows:
ItemA
– itemB
– Action1
– Action2
– itemC
– itemD

deleting ItemB would produce the following:
ItemA

• Change Status allows you to change the status of the item from a submenu:


If you choose In Progress, you can also choose one of the five pre-defined % Complete values:


• Collapsed Items – Expand Branch expands the branch after the item.

• Expanded Items – Collapse Branch collapses the branch down to just the selected item.
</td></tr>
<tr><td>Questions</td><td>
Menu for a question with a collapsed branch:


Menu for a question with an expanded branch:


</td></tr>
</table>

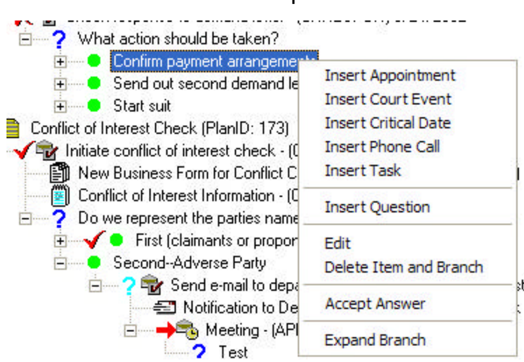
<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td></td><td>

Insert Question is used to insert a new question into the plan after the selected question.
Insert Answer is used to insert a new answer into the plan for the selected question.
Edit opens the question data entry form.
Delete Item and Branch deletes the current question, as well as the branch under the question.

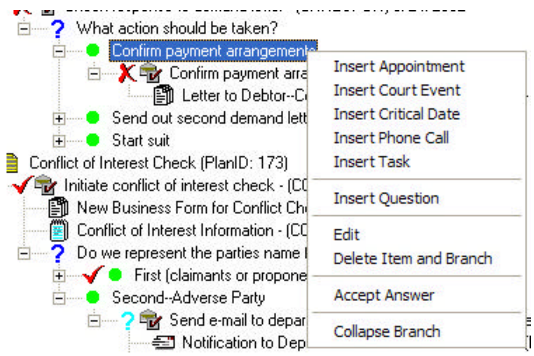
For example, if the branch appears as follows:
ItemA
– QuestionA
– Answer1
– item1A
– item1B
– Answer2
– item2A
– item2B

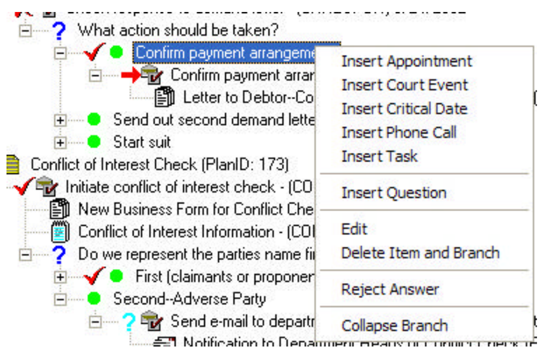
deleting QuestionA would produce the following:
ItemA

Note that Delete Item would have the same functionality where there is no branch under the question.
Collapsed Questions – Expand Branch expands the branch after the question.
Expanded Questions – Collapse Branch collapses the branch down to just the selected question.

</td></tr>
<tr><td>Answers</td><td>Menu for answer with collapsed branch:


</td></tr>
</table>

<table>
<tr><th>Right-click on…</th><th>Resulting Menu</th></tr>
<tr><td></td><td>
Menu for answer with expanded branch:


Menu for an answer that has been accepted:


Insert Appointment is used to insert a new appointment into the plan after the selected answer.
Insert Court Event is used to insert a new court event into the plan after the selected answer.
Insert Critical Date is used to insert a new critical date into the plan after the selected answer.
Insert Phone Call is used to insert a new phone call into the plan after the selected answer.
Insert Task is used to insert a new task into the plan after the selected answer.
Insert Question is used to insert a new question into the plan after the selected answer.
Edit opens the answer data entry form.
Delete Item and Branch deletes the current item, as well as any linked actions for that item, and then deletes the branch under the item.

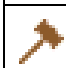
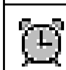
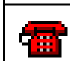
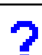
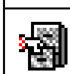
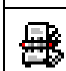
</td></tr>
</table>

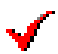
Right-click on…	Resulting Menu
	For example, if the branch appears as follows: ItemA – QuestionA – Answer1 – item1A – item1B – Answer2 – item2A – item2B deleting Answer2 would produce the following: ItemA – QuestionA – Answer1 – item1A – item1B Note that Delete Item would have the same functionality where there is no branch under the answer. • Accept Answer, available for answers that have not been selected, accepts the answer and activates the items in the branch under that answer (note that you can select more than one answer). • Reject Answer, available for answers that have been selected, rejects the answer and deactivates the items in the branch under that answer. • Collapsed Answers – Expand Branch expands the branch after the answer. • Expanded Answers – Collapse Branch collapses the branch down to just the selected answer.
Linked Actions – Uncompleted	Menu for uncompleted linked actions:  • Edit opens the Assign Action window, where you can modify the properties of the linked action. • Delete Item deletes the linked action. • Execute and Mark Complete carries out the linked action and marks the item as complete.

Right-click on…	Resulting Menu
Linked Actions – Completed	Menu for completed linked actions:  • Edit opens the Assign Action window, where you can modify the properties of the linked action. • Open opens the record created by the linked action. • Delete Item deletes the linked action. • Mark Uncompleted sets the linked action back to uncompleted, but does not delete the original record.

Workflow Plan and Calendar Icon Updates

The workflow plan and calendar icons have been updated as follows:

Icon	Definition
	Plan
	Appointment
	Court Event
	Critical Date
	Phone Call
	Task
	Question (blue question mark)
	Answer (green dot)
	Create New Matter
	Create New Entity

Icon	Definition
	Create New Document
	Create New Note
	Send New e-Mail
	Enter New Timeslip
	Execute a Program Function (includes inserting a new plan)
	Started / In Progress – for Plans (green arrow)
	Scheduled – Due Date in the future. (yellow arrow)
	Scheduled – Due Date in the past. (red arrow)
	Unscheduled. (light blue question mark)
	Completed.
	Cancelled.

Change Specific to Workflow Data Entry Forms

General Usability Updates to Workflow Data Entry Forms

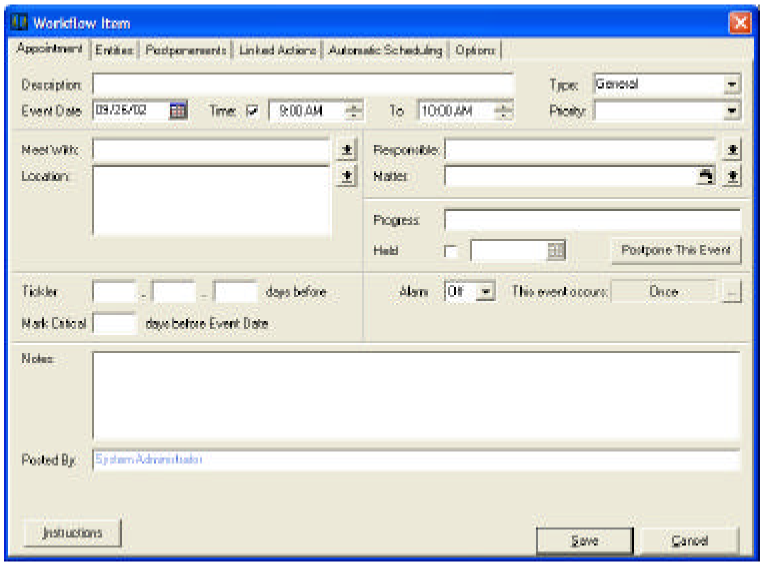
PCR 9018, 9019 and 9020

We have rearranged the screens so that common fields are in the same position on all 5 workflow items, and unique fields appear in the same place on each form – one of the "panels" is sensitive to the item type, and is replaced each time.

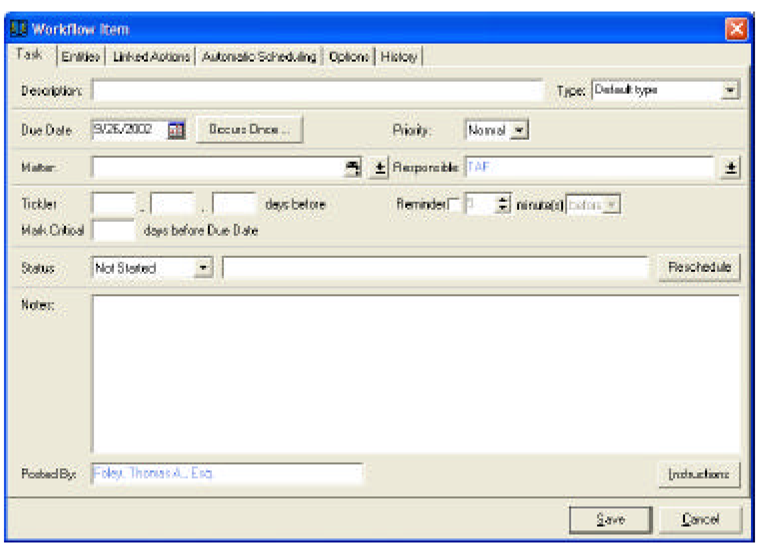
We have adjusted the tabbing sequence on the first tab to be more logical for how a user might create a workflow item (it helps to pick the Matter BEFORE you go to the Responsible, Meet/Speak With, or Jurisdictions fields, as these can then be filtered on the matter, etc.).

Task Data Entry Form

The Task data entry form appeared as follows in Practice Manager 8.6 SP2:

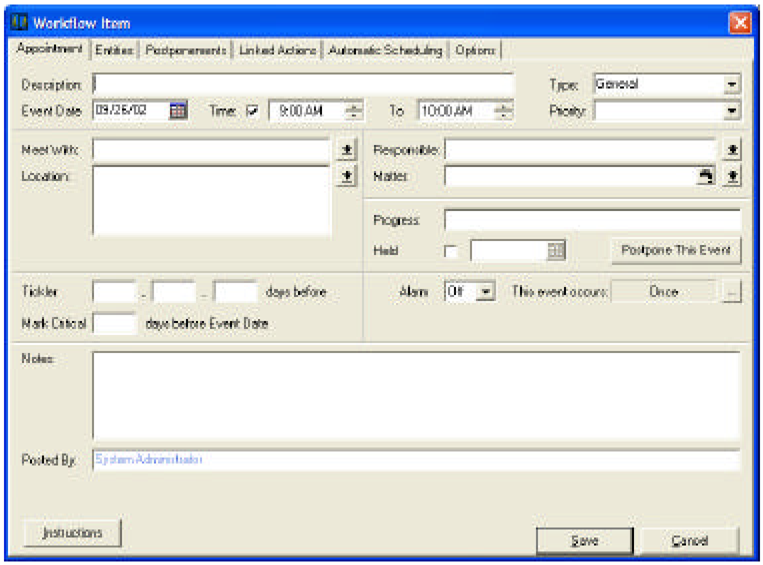


The Task data entry form appears as follows in the current release of Practice Manager:

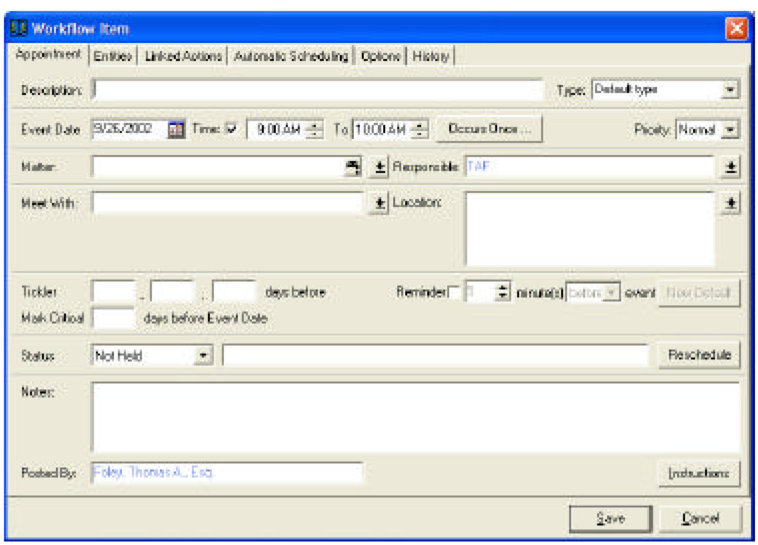


Appointment Data Entry Form

The Appointment data entry form appeared as follows in Practice Manager 8.6 SP2:

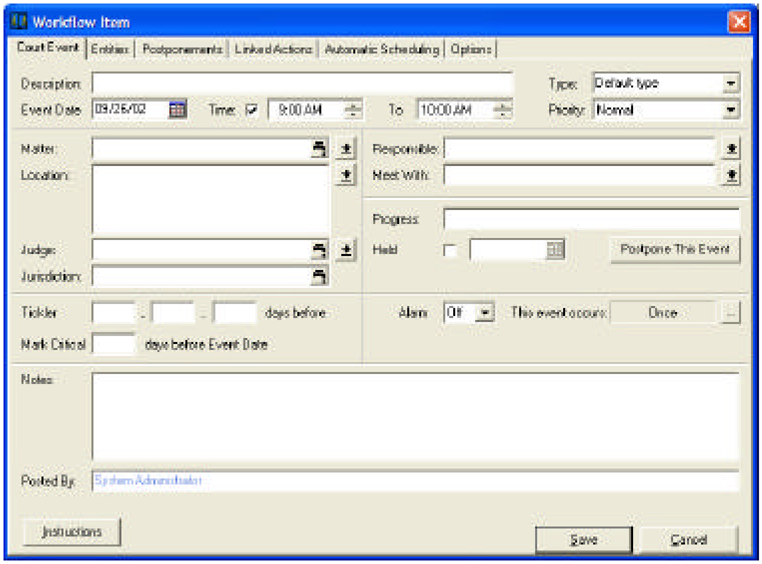


The Appointment data entry form appears as follows in the current release of Practice Manager:

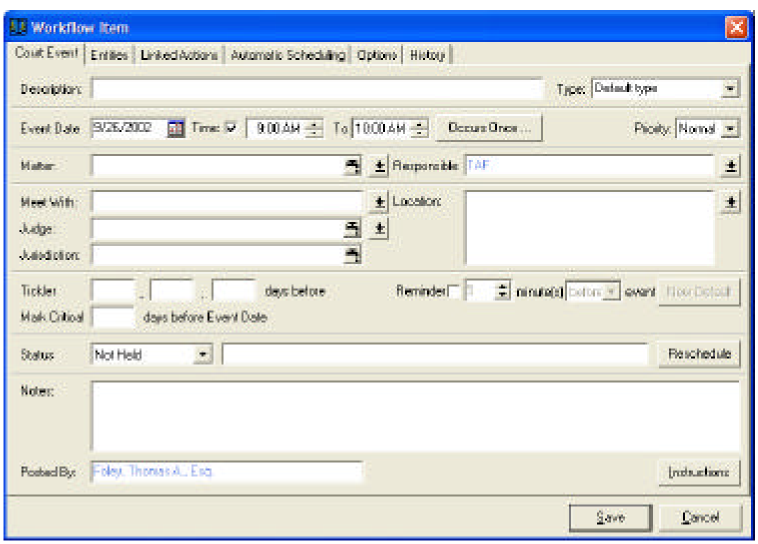


Court Event Data Entry Form

The Court Event data entry form appeared as follows in Practice Manager 8.6 SP2:

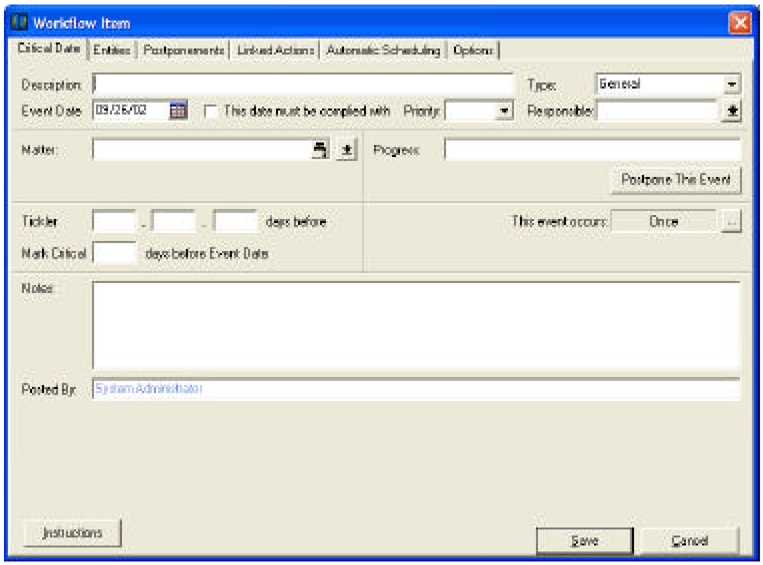


The Court Event data entry form appears as follows in the current release of Practice Manager:

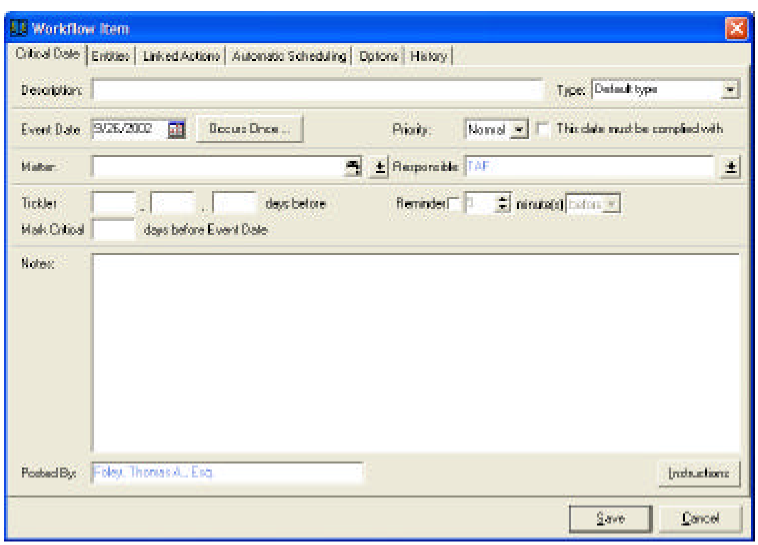


Critical Date Data Entry Form

The Critical Date data entry form appeared as follows in Practice Manager 8.6 SP2:

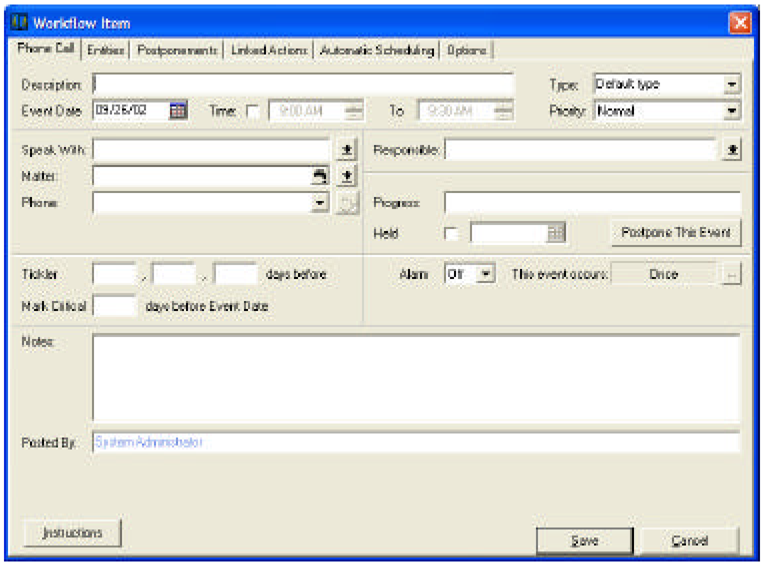


The Critical Date data entry form appears as follows in the current release of Practice Manager:

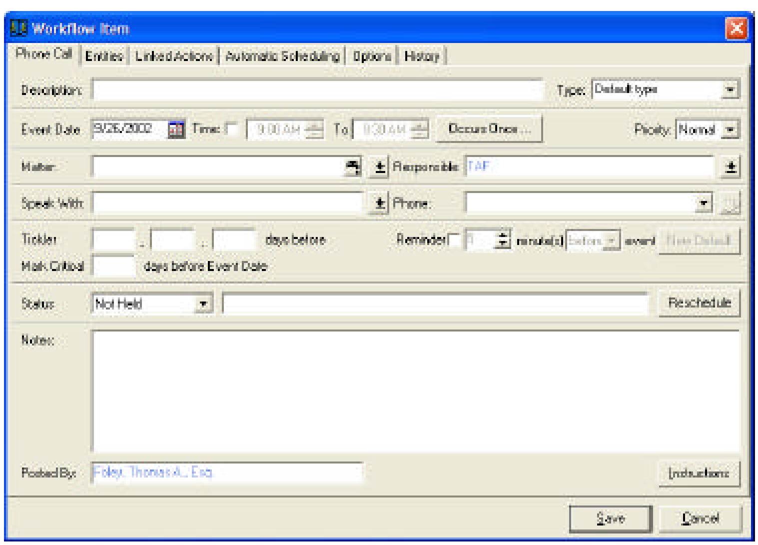


Phone Call Data Entry Form

The Phone Call data entry form appeared as follows in Practice Manager 8.6 SP2:



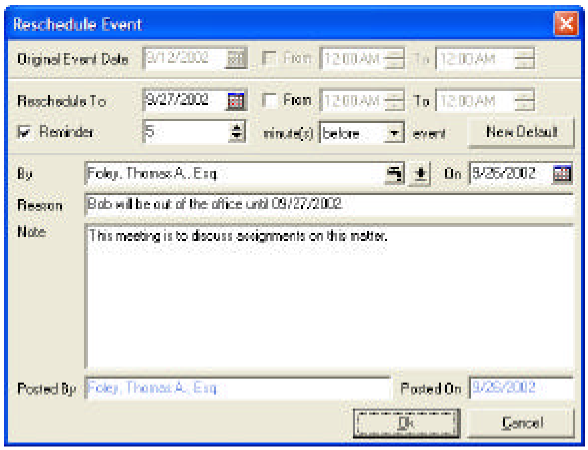
The Phone Call data entry form appears as follows in the current release of Practice Manager:



Postpone/Postponement is now Reschedule/History

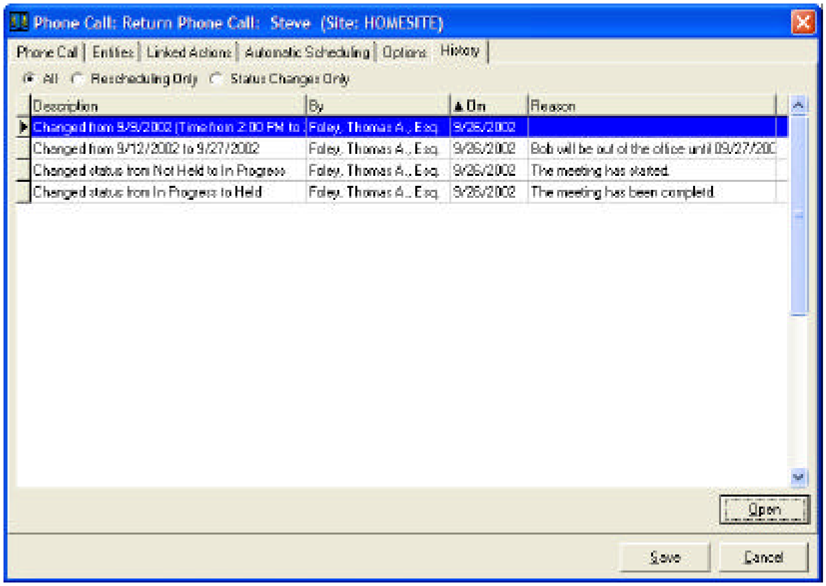
PCR 9018, 9019 and 9020

The Postpone functionality has been renamed to Reschedule to better describe the action that is taken place (postpone means to move an event date later into the future). With the renaming also came an expansion of functionality, as evidenced by the data entry form for rescheduling:



- The Original Event Date and Time, if applicable, appears at the top of the form.
- The second section provides fields for rescheduling the Event Date and Time, if applicable, as well as updating the Reminder criteria.
- The third section captures information about the user who reschedule the item, using the account information of the active user. There is also a field to enter a brief reason for the rescheduling.
- The fourth section is the note from the workflow item. Any changes here are automatically applied to the workflow item itself.

The Postponements tab has been changed to History.



When any of the following occurs, a history entry is logged:

- The Status is changed
- The Event Date is changed/rescheduled

The history grid has a Description, By, Date and Reason columns. Descriptions read as follows:

- For Date/Time Change: "Changed from [Original Date/Time] to [New Date/Time]"
- For Rescheduling: "Changed from [Original Date/Time] to [New Date/Time]"
- For Status Change: "Changed status from [status description] to [status description]"
- For % Complete change: "Changed from [% complete] to [% complete]"

You can filter the listing to show Rescheduling history records, Status Change history records, or All history records.

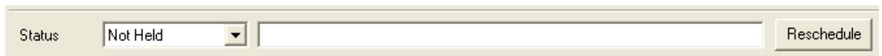
Clicking Open displays the dialog box appropriate to the change action – Reschedule Event or Status Change.

Updates Status Values

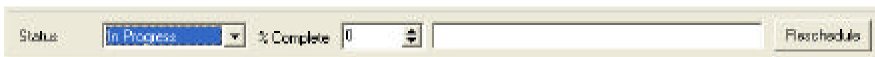
PCR 9018, 9019 and 9020

We have changed how Status works, removing the old "Completed" checkbox. You can now set a status from a drop-down list. The choices are:

- Not Held/Started (includes Comment field)



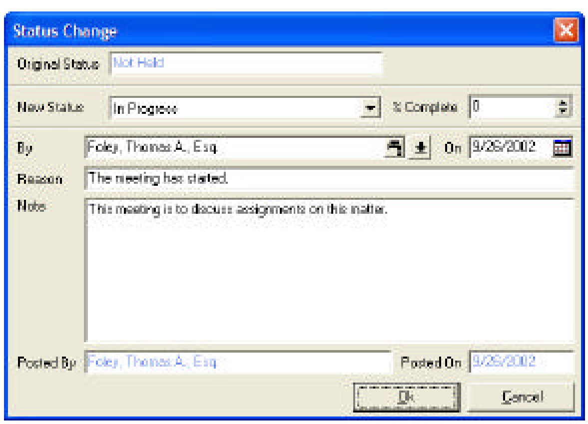
- In Progress (includes Percent and Comment fields)



- Held/Completed (includes Completed By and Date fields)

- Canceled (includes Canceled By and Date fields)

When you change the status, a dialog box pops up that shows you the Current Status and the New Status.



- The original status appears at the top of the form.
- The second section allows you to select the new status. Note that if you change the status on the DE form, the value you selected automatically

populates this field. You can also enter a percent complete for items that are In Progress.

- The third section captures information about the user who changed the status of the item, using the account information of the active user. There is also a field to enter a brief reason for changing the status.
- The fourth section is the note from the workflow item. Any changes here are automatically applied to the workflow item itself.

You can set the Status, enter any info you want, and click OK. This actually makes an entry in a new History tab.

Changes in status automatically record an entry on the History tab (see "Postpone/Postponement is now Reschedule/History" beginning on page 8-58).

Show branches for all answers

PCRs 10925

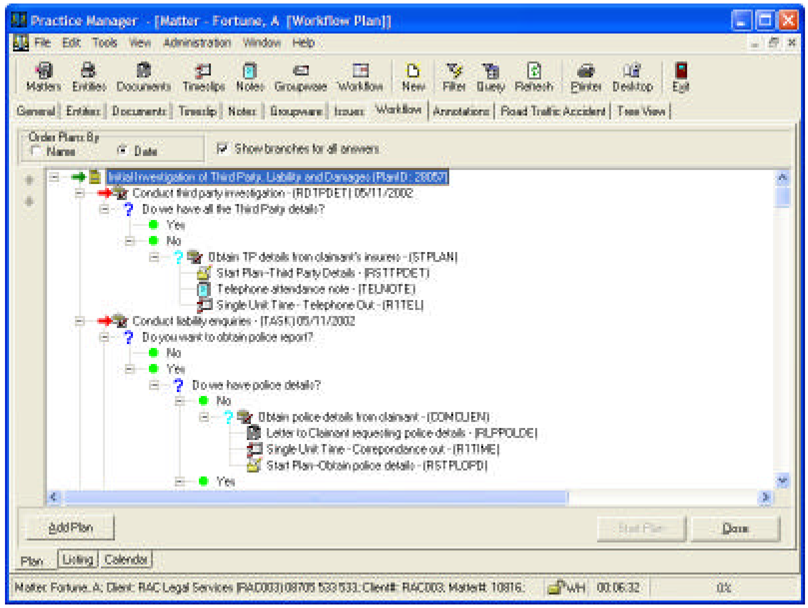
When you are working with Workflow Plans, you can choose whether or not to display branches for answers that were not selected. This is done through a 2-step process:

5 A new functional security operation – Workflow: Show branches for all answers – is assigned to the security role for your active site.

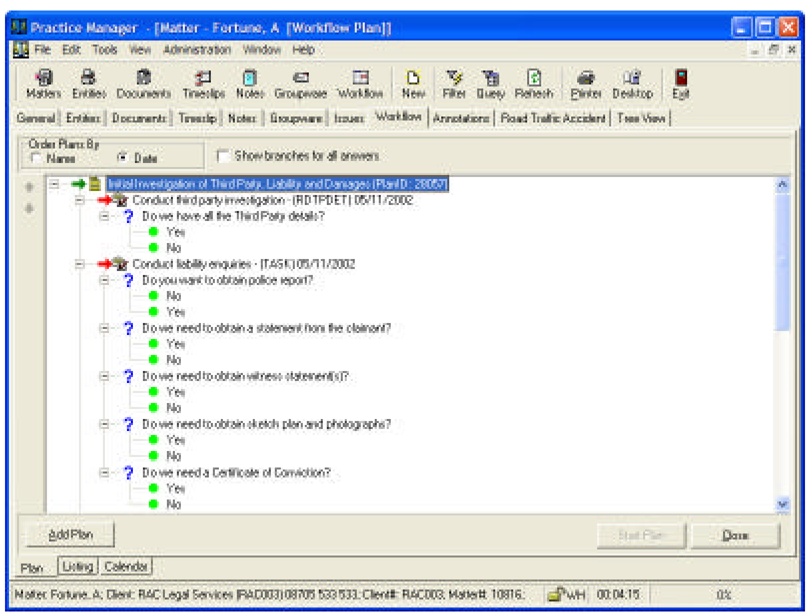
The reason this has been added as a security function is that your firm may decide they do not want users to be able to view the branches under answers until they have been accepted. This prevents items from being executed on those branches until the answer as been accepted.

6 You check the Show branches for all answers checkbox on the Workflow – Plan tab in a matter.

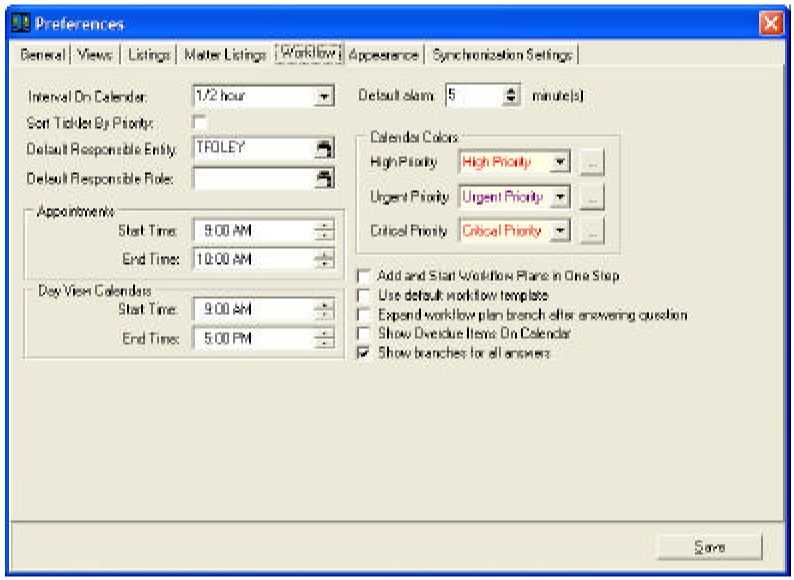
- When checked, expanding a branch ignores whether answers in that branch have been accepted or not, and displays all items in the branch.



- When not checked, expanding a branch only shows items up to, and including, the first unaccepted answer on the branch.



If you want to set Show branches for all answers as your default view, you can go to the Edit – Preferences – Workflow tab, and check Show branches for all answers.



When you open the Workflow – Plan tab, this box will automatically be checked.

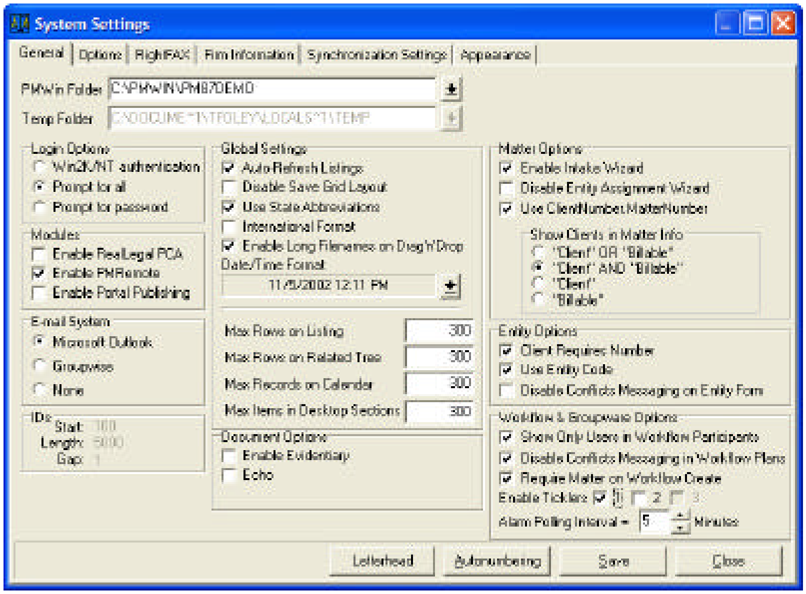
Enabling and Disabling Ticklers

PCRs 11997

In Practice Manager v8.0, there was only one tickler associated with workflow items. In Practice Manager v8.5 and higher, two additional ticklers were added. And while this functionality allows up to three ticklers to be defined for each workflow item, it does come at a minor “cost” in performance, especially when loading a calendar that has a large number of items included.

For this reason, ticklers can be enabled or disabled, as needed, to enhance performance of loading the workflow calendar.

In the Workflow & Groupware Options section on the General tab of System Settings, there is now a series of checkboxes for enabling and disabling ticklers.



You must enable ticklers in order, that is 1, then 2 and then 3. This is why, when 1 is not checked, 2 and 3 are disabled. When 1 is checked, 2 is enabled but 3 is not. You cannot enable tickler 3 without also enabling ticklers 1 and 2.

➢ Ticker 1, when checked, provides the same functionality as that found in Practice Manager v8.0:

- Tickler 1 appears as a field on the workflow data entry form.
- Tickler 1 is an available column for the workflow listing.
- Tickler 1 is an available field for query.
- Tickler 1 is respected on the workflow calendar and desktop views.

If your organization does not routinely use ticklers, you can uncheck this field for improved performance on the workflow calendar.

This field is checked by default after conversion.

➢ Tickler 2, when checked, causes the Tickler 2 field provides the following functionality:

- Tickler 2 appears as a field on the workflow data entry form.
- Tickler 2 is an available column for the workflow listing.
- Tickler 2 is an available field for query.

- Tickler 2 is respected on the workflow calendar and desktop views.

This System Setting field is only enabled after Tickler 1 is checked.

This field is not checked by default after conversion.

➢ Tickler 3, when checked, causes the Tickler 2 field provides the following functionality:

- Tickler 3 appears as a field on the workflow data entry form.
- Tickler 3 is an available column for the workflow listing.
- Tickler 3 is an available field for query.
- Tickler 3 is respected on the workflow calendar and desktop views.

This System Setting field is only enabled after Tickler 2 is checked.

This field is not checked by default after conversion.

After changing the System Settings for ticklers, all users must log out of and log back into Practice Manager in order for the changes to completely take effect.

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Timeslips

Summary of Changes to the Timeslips Module

There are 62 Timeslip- and Timeslip Settings-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
8512	Timeslips now pass the time from the timer, even if it has been paused, regardless of how long the matter record has been opened.	PM87
8532	Timeslip Listing respects new All Filter/Query Access Functional Security Option.	PM87
8930	Juris has been added to the list of available Billing Programs. When this program is selected as the Billing Program, a new Billing button appears Matter-Timeslips that allows you to log in and retrieve information from Juris.	PM87
9038	Exporting timeslips respects the updated Site Security model.	PM87
9160	Date Created has been added to Timeslips, and can be used in the Groupware Listing and Query.	PM87
9630	The following operations are only available if the user has Open Timeslip Information in their functional security role: • Set to Reimbursed • Set to Not Reimbursed • Export • Reverse • Backout • Transfer to Another Matter	PM87
4660	When the Entity Listing quick filter is set to ALL for Timekeeper, unselecting ALL advances the cursor to the Timekeeper look-up field.	PM87 SP1

PCR	Description	In Version
11249	The spaces have been removed from the following available fields on the timeslip listing, thereby correcting the sort order that previously appeared: Date Created, Export Status, Flat Rate, Out of Pocket, Rate/Price, Reimbursed, Status and Type.	PM87 SP1

Annotations, Auxiliaries and Issues

Summary of Changes

There are 2 Annotation-related PCRs and 19 Issue-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
7315	The entity look-up fields on annotation forms created with FormsDesigner now respect Site Security.	PM87
7986	The Annotation Settings form respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15), as well as type search filtering.	PM87
8283	Related Entities on the Issues form respects updated assignment and unassignment functionality (see "Updated Asssign/Unassign Functionality" beginning on page 2-15).	PM87
8585	Issues Listing respects new All Filter/Query Access Functional Security Option.	PM87
8586	Annotation Listing respects new All Filter/Query Access Functional Security Option.	PM87
9360	The Matter–Annotations listing now supports Save Grid Layout.	PM87
10238	Documents opened from Annotations now supports Drive Mappings.	PM87

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Administration

General Changes to Administration

There have been many changes and updates to the Administration of Practice Manager. The following sections detail many of those changes, listing PCRs that have been completed, as well as providing detailed information for areas where it has been determined to be necessary.

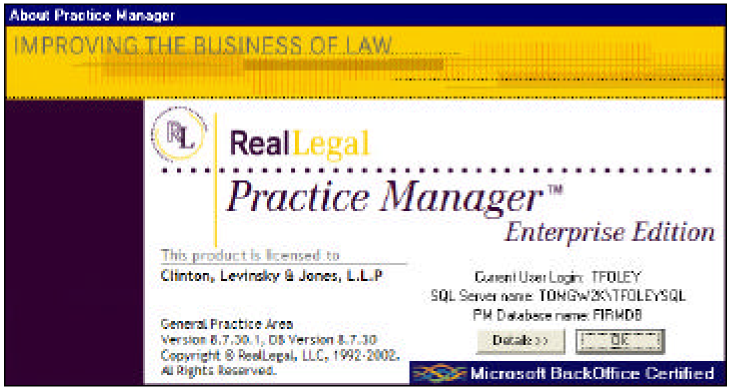
Version Control Checking and Details

PCR 8363

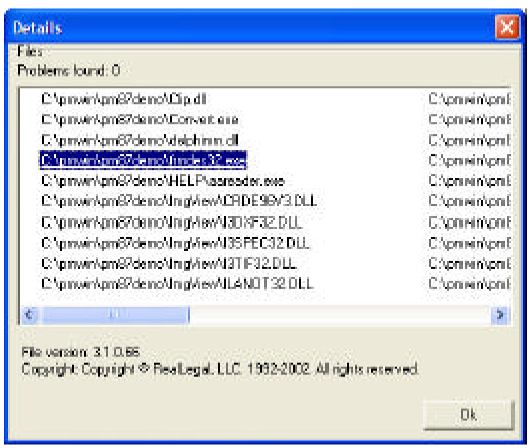
As sometimes happens, the Practice Manager file set gets updated with files that are from previous versions of the product. This typically happens because of some restore or copying operations. When this happens, Practice Manager may not function properly, if at all. As mentioned in the introduction to this manual, it is important to keep the Practice Manager version and database versions synchronized (see "Build" beginning on page 1-3), but these are not the only two files in the Practice Manager file set.

To make it easier to analyze whether you have the proper files installed, we have added ESD – Electronic Software Distribution – registration to Practice Manager. This keeps track of what versions of each file need to be used with other versions of files. This feature allows you to quickly see what files are not of the same file set as the main Practice Manager application.

To carry out this analysis, choose Help – About in Practice Manager, and click on the Details button.

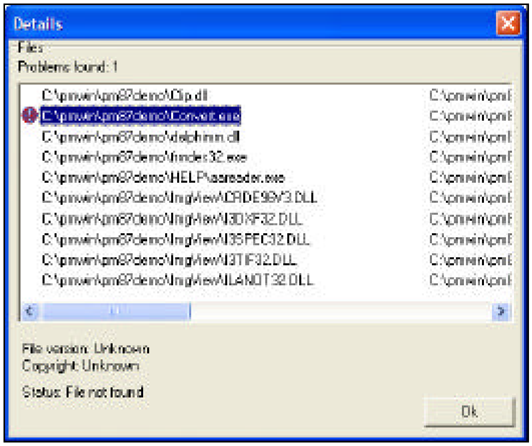


The Details window appears, listing all files in Practice Manager, including their location.

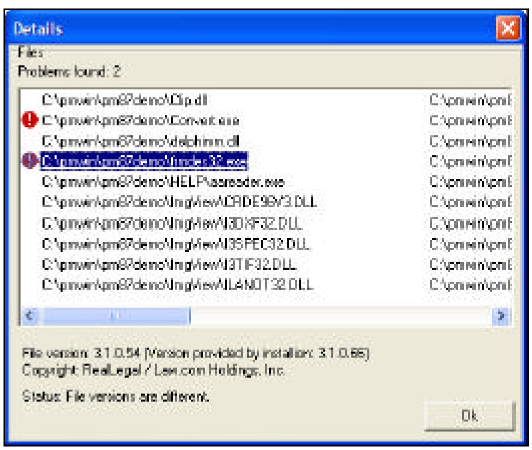


Placing the mouse pointer over the file name displays the current version information at the bottom of the window.

If there are problems found, they are identified by a counter at the top of the window, as well as an exclamation point in a red circle next to the file name.



Placing the mouse pointer over the file name displays the status of the item. In the above case, it turns out the file was not found, and in the following example, the file is the wrong version:



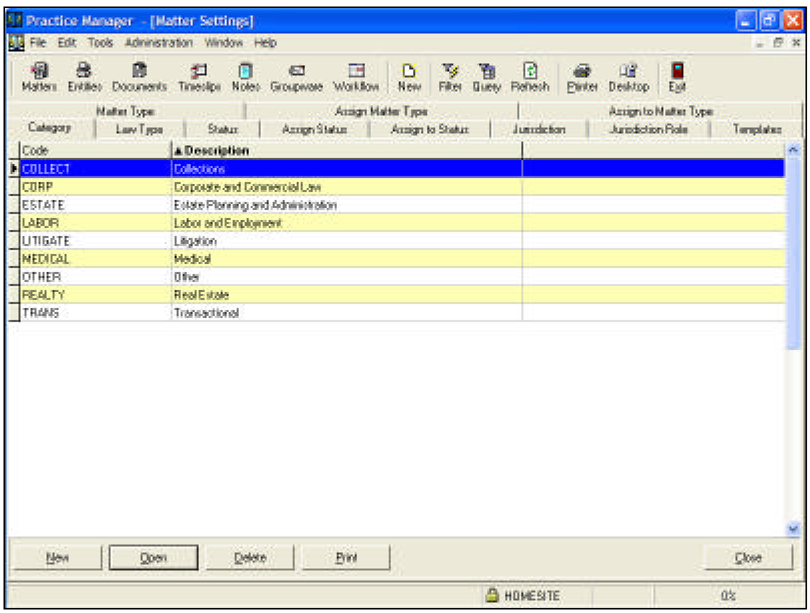
In either case, contact RealLegal Practice Manager Application Support and provide the information you found on the Details screen. They will be able to assist you in synchronizing your file set with the installed version of Practice Manager.

Multi-line Tabs on Administration Forms

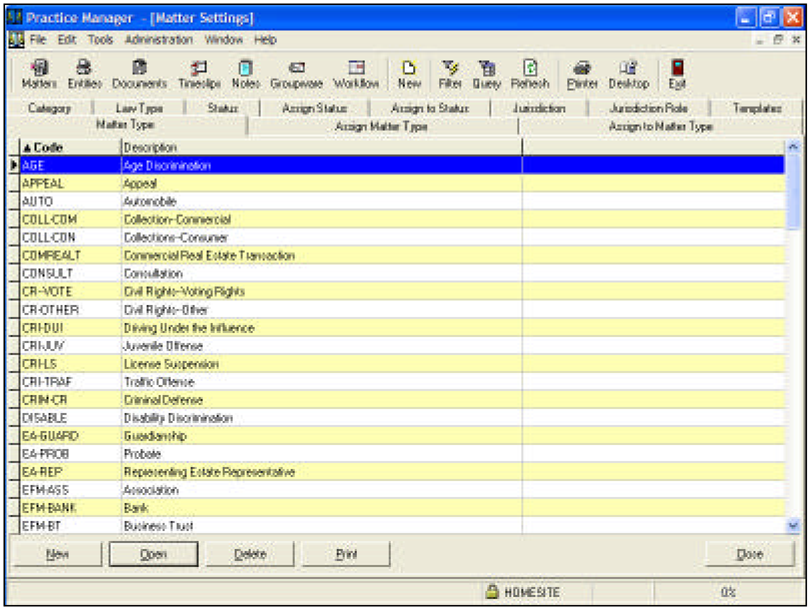
PCR 8908

Many administration forms had so many tabs that they would scroll off the right side of the window, requiring the user to use the horizontal scroll bar. This was particularly true at lower resolutions.

To correct this condition, we have implemented multi-line tabs, which now display the tabs in one or more rows. The following is an example of the Matter Settings form:



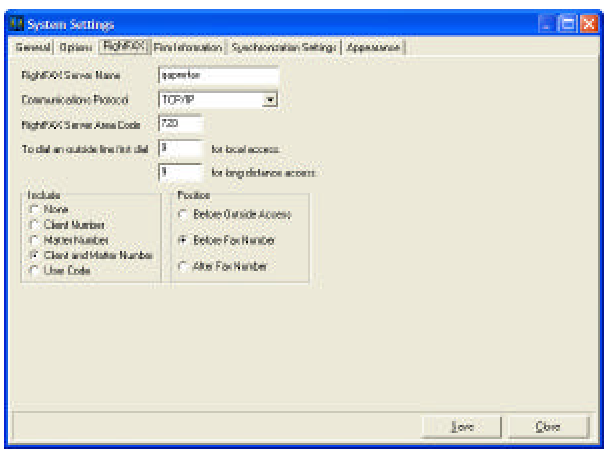
When you switch to a tab on the back row, such as Matter Type, the two rows of tabs switch:



Changes to System Settings

There are 32 System Settings-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
6421, 7653, 8478, 8479, and 8940	Additional logic has been added behind changing the value in Show Client in Matter Info, allowing existing entity selections to be updated so they comply with the newly selected requirement and can continue to be used in the Client/Billable field. For more information, see "Changes to Show Clients in Matter Info" beginning on page 11-6.	PM87
7722	When you enabled PMRemote, Practice Manager checks to see if the pmremote_ins and/or pmremote_upg subfolders are present in the <pmroot> folder. If not, a message displays. You will need to re-run the install or upgrade program, selecting PMRemote as an option to install. This will create the necessary folders. Once these folders are in place, users can install PMRemote on their computer from the File menu.	PM87

PCR	Description	In Version
8837	If you change the setting in the Use ClientNumber.MatterNumber field, a dialog appears giving you the option of updating the database, skipping the database update, or returning to the System Settings window so you can reset the changes.	PM87
8844	A new Appearance tab has been added for managing grid themes (see page 11-11).	PM87
8983	As with matter assignments, there is now an option to disable conflicts checking messages when selecting a parent entity for an entity. This setting can be found on the System Setting - General tab.	PM87
9003	UNC support has been updated for the PMWin Folder, and is now fully implemented throughout Practice Manager.	PM87
9485	A new option, Max Items in Desktop Sections, has been added to limit the number of items that can appear in each section of the new PM Desktop Views (see "PM Desktop Views" beginning on page 2-27).	PM87
8253 and 8914	The RightFAX tab in System Settings has been updated to be more intuitive, and Web settings have been removed. 	PM87

Changes to Show Clients in Matter Info

PCRs 6421, 7653, 8478, 8479, and 8940

If you change the value in the Show Client in Matter Info option group, Practice Manager displays a dialog box and gives you the option of updating your data so that previously select clients continue to appear in the Client field. This is necessary because you could make a change such that existing clients no longer meet the selected criteria, and those clients would no longer be available in the matter.

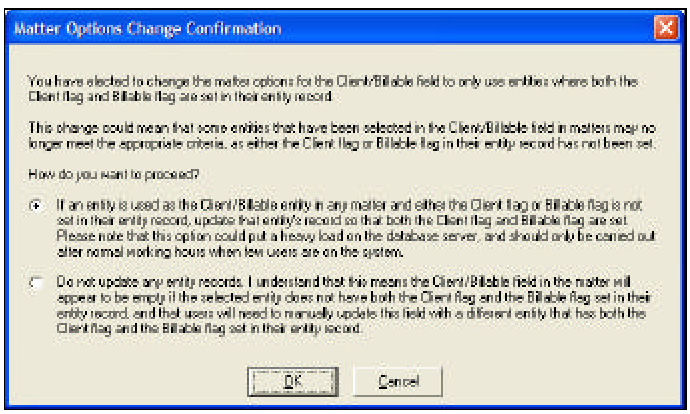
The following changes do not impact the database:

- Changing from Client AND Billable to Client OR Billable
- Changing from Client AND Billable to Billable
- Changing from Client AND Billable to Client
- Changing from Client to Client AND Billable
- Changing from Billable to Client AND Billable

Below are listed the changes that could trigger the need to convert the database. For each change, a dialog box appears, giving you the option of converting the data or not.

Changing Client OR Billable to Client AND Billable

If you change from Client OR Billable to Client AND Billable, the following dialog box appears:



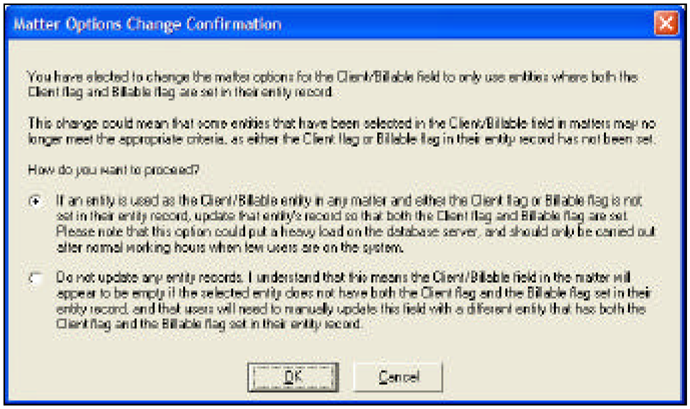
If you choose the first option, the following will occur:

- Any entity marked as a Client but not Billable will have the Billable field checked after the conversion.
- Any entity marked as Billable but not as a Client will have the Client field checked after the conversion.

If you choose the second option, no conversion will take place, and you may have problems with certain entity records on the Matter – General tab.

Changing Client OR Billable to Client

If you change from Client OR Billable to Client, the following dialog box appears:

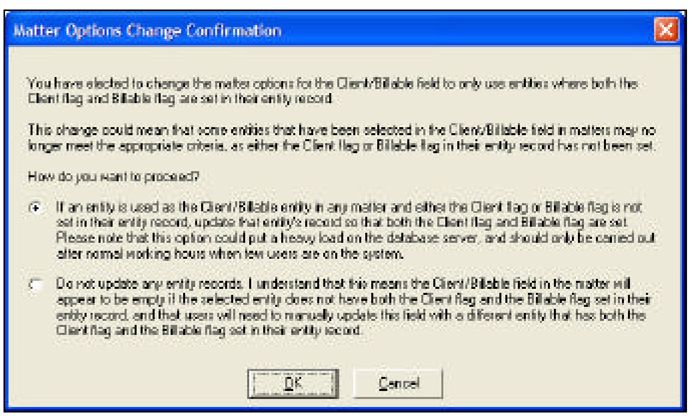


If you choose the first option, any entity marked as Billable but not as a Client will have the Client field checked after the conversion.

If you choose the second option, no conversion will take place, and you may have problems with certain entity records on the Matter – General tab.

Changing Client OR Billable to Billable

If you change from Client OR Billable to Billable, the following dialog box appears:

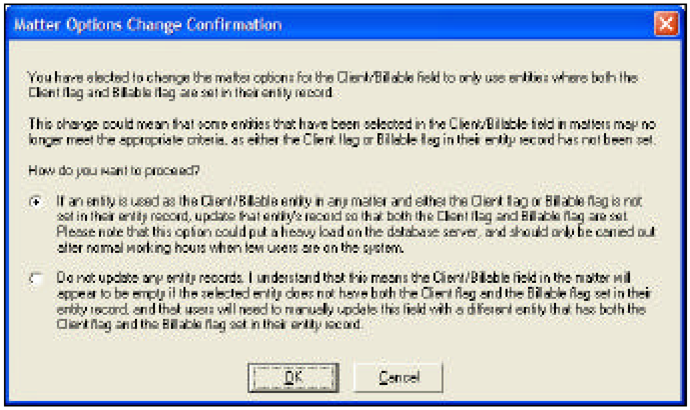


If you choose the first option, any entity marked as a Client but not as Billable will have the Billable field checked after the conversion.

If you choose the second option, no conversion will take place, and you may have problems with certain entity records on the Matter – General tab.

Changing Client to Client AND Billable

If you change from Client to Client AND Billable, the following dialog box appears:

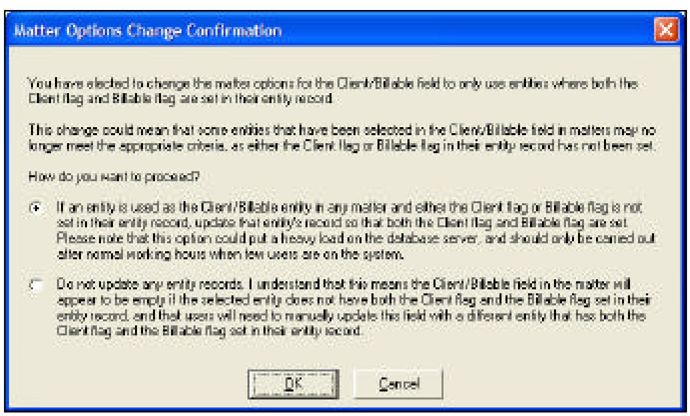


If you choose the first option, any entity marked as a Client but not as Billable will have the Billable field checked after the conversion.

If you choose the second option, no conversion will take place, and you may have problems with certain entity records on the Matter – General tab.

Changing Billable to Client AND Billable

If you change from Billable to Client AND Billable, the following dialog box appears:

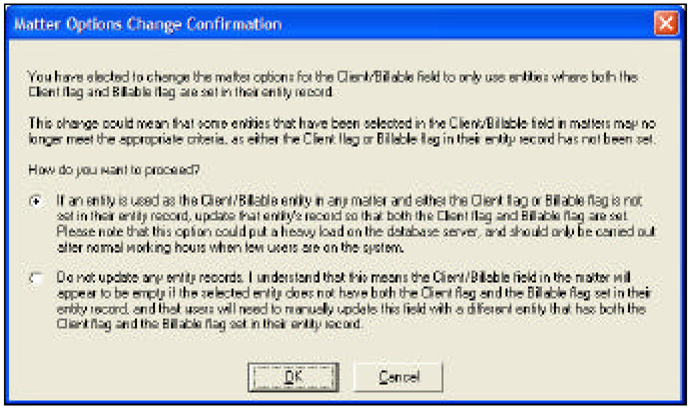


If you choose the first option, any entity marked as Billable but not as a Client will have the Client field checked after the conversion.

If you choose the second option, no conversion will take place, and you may have problems with certain entity records on the Matter – General tab.

Changing Client to Billable

If you change from Client to Billable, the following dialog box appears:

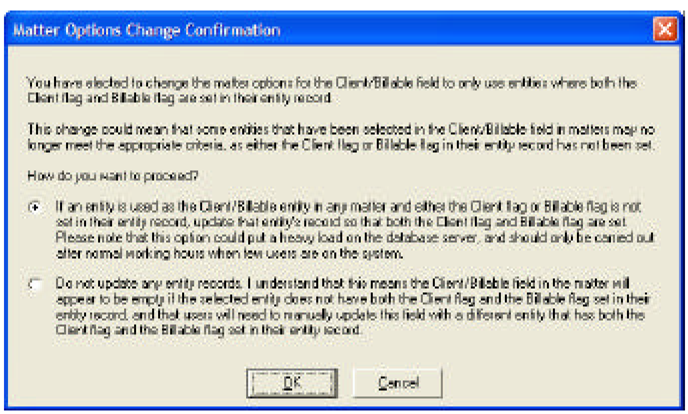


If you choose the first option, any entity marked as a Client but not as Billable will have the Billable field checked after the conversion.

If you choose the second option, no conversion will take place, and you may have problems with certain entity records on the Matter – General tab.

Changing Billable to Client

If you change from Billable to Client, the following dialog box appears:



If you choose the first option, any entity marked as Billable but not as a Client will have the Client field checked after the conversion.

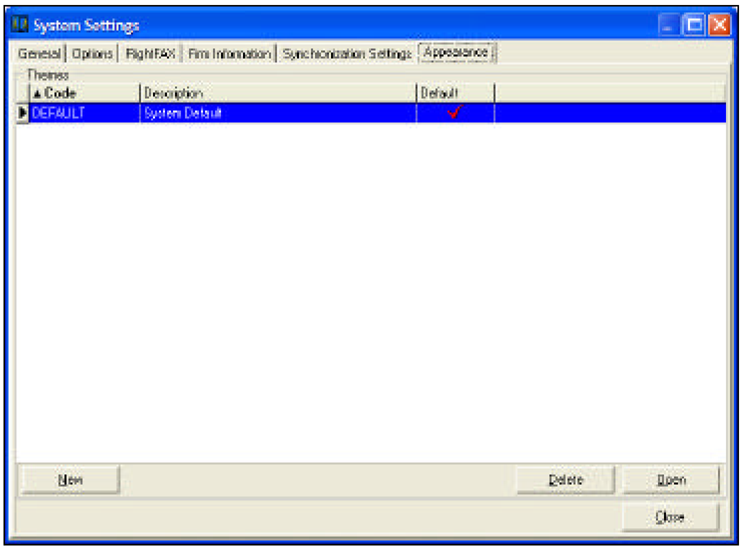
If you choose the second option, no conversion will take place, and you may have problems with certain entity records on the Matter – General tab.

For a clarification on how System Settings and the entity record values impact the Client/Billable field on matters, see "Updates for Client/Billable Field Values" beginning on page 3-13.

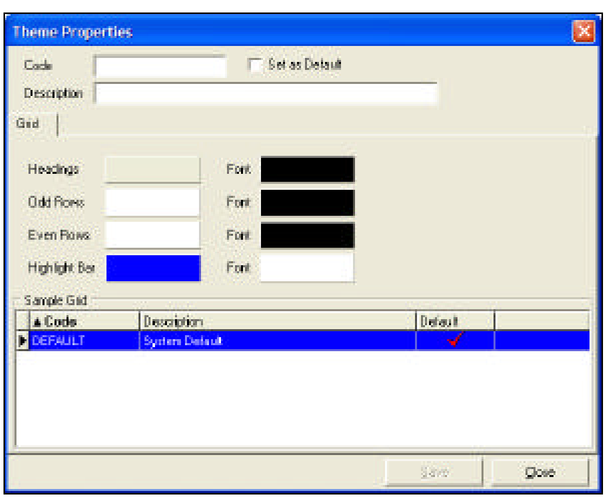
Appearance

PCR 8844

A new Appearance tab has been added to System Settings to let you define Themes for the Grid colors used by Preferences (for more information, see "Grids" beginning on page 2-21).



Themes are created by clicking the New button to display a Theme Properties window.



Colors are changed by clicking on one of the color buttons to display the Color selection dialog box:

You can then modify the Grid properties from this window:

- Choose colors for the Heading row background and text (Font).
- Choose colors for the Odd Row background and text (Font).
- Choose colors for the Even Row background and text (Font).
- Choose colors for the Highlight Bar background and selected text (Font).

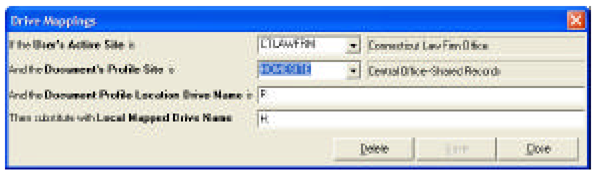
A sample appears on the grid at the bottom of the form.

Changes to Security and Site Settings

There are 90 Security-related PCRs and 8 Site-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
7634	The “lock icon” has been updated on the status bar: • If both matter and site security are disabled, the open lock icon appears indicating that the user’s active login bypasses security: • If matter security is enabled and site security is not, and the user has No Matter Security in their security role, the open lock icon appears indicating that the user’s active login bypasses security: • If site security is enabled and matter security is not, and the user has No Site Security in their security role, the open lock icon appears indicating that the	PM87

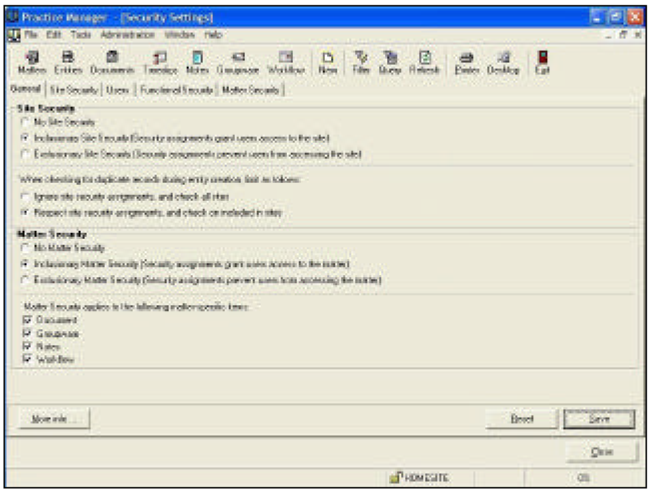
PCR	Description	In Version
	user's active login bypasses security: •  If matter and site security are enabled, and the user has No Matter Security and No Site Security in their security role, the open lock icon appears indicating that the user's active login bypasses security: •  Otherwise, the closed lock icon appears, indicating that the user's active login respects site security:	
8435	Copying User Settings also copies all User Preferences from the source user to the selected users.	PM87
8469, 8604, 8615, and 9364	You can now change the matter and site security implementations in any of the following combinations: • None => Inclusionary • None => Exclusionary • Inclusionary => None • Exclusionary => None • Inclusionary => Exclusionary • Exclusionary => Inclusionary • Inclusionary => None => Exclusionary • Exclusionary => None => Inclusionary Where updates of the database are required, dialogs have been added with options to simplifying the conversion of the security implementation. For more information, see "Changing the Security Implementation" beginning on page 11-15. The messages that appear when you change the site and/or matter security implementations have been updated to reflect the various combinations of changes that can now be carried out.	PM87
8598	The Phone data entry form now respects the same securities as Notes.	PM87
8847 and 8848	Site Type has been added to the Practice Manager site model (see "Working with Sites Types" beginning on page 11-25)	PM87
9265	The scope of duplicate checking can be limited to respect Site Security. For more information see "Configuring Duplicate Entity Checking" beginning on page 11-24.	PM87
9364	The messages that appear when you change the site and/or matter security implementations have been updated based on the fact that you can now change from	PM87

PCR	Description	In Version
10269	Scripts have been added for setting the previous state of security in Practice Manager when the current is state is None and security was once implemented. For more information, see "Tracking Previous Security Implementation" beginning on page 11-22	PM87
9668 and 10265	In order to preview notes from the note listing, the entity must have Edit Notes in their security role for their active site.	PM87 SP1
11033	Labeling on the Drive Mappings data entry form has been updated to be more intuitive:  • If the User's Active Site is – This is the user's active site. • And the Document Profile Site is – This is the site where the document was created. • And the Document Profile Location Drive Name is – This is the drive letter from the document's location. • The substitute with Local Mapped Drive Name – This is the drive letter to use in place of the document's drive letter.	PM87 SP1
11120	"Workflow: Show branches for all answers" (formerly "Show All Paths" in Practice Manager v8.0) has been added as a functional security operation. When assigned, the user has a new Preference and checkbox for Workflow Plans. This box, when checked, displays branches under all answers, regardless of whether or not they have been accepted. When not checked, only branches under accepted answers appear. When not assigned, the user only sees branches under answers that have been accepted. Branches under answers that have not been accepted are not visible.	PM87 SP1

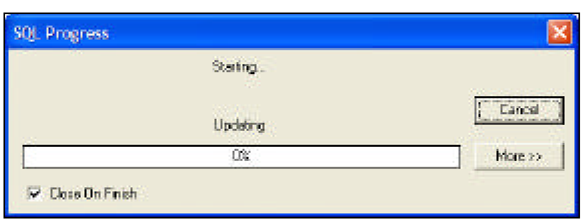
Changing the Security Implementation

PCRs 8469 and 8604

You can now change the security implementation from Inclusionary to Exclusionary for both Site and Matter Security without the need to run any special scripts. Please note that this was added only to aid during the implementation stage, when firms may choose to change how security is implemented once they better understand how it works.



Changing the security implementation does run a very extensive conversion script, and is not a recommended action when there are users working on the system. There is plenty of detailed information in the dialog boxes that appear when you change the implementation to aid the user in knowing what actions need to be carried out, and when. While the scripts are being run, the following progress indicator appears:

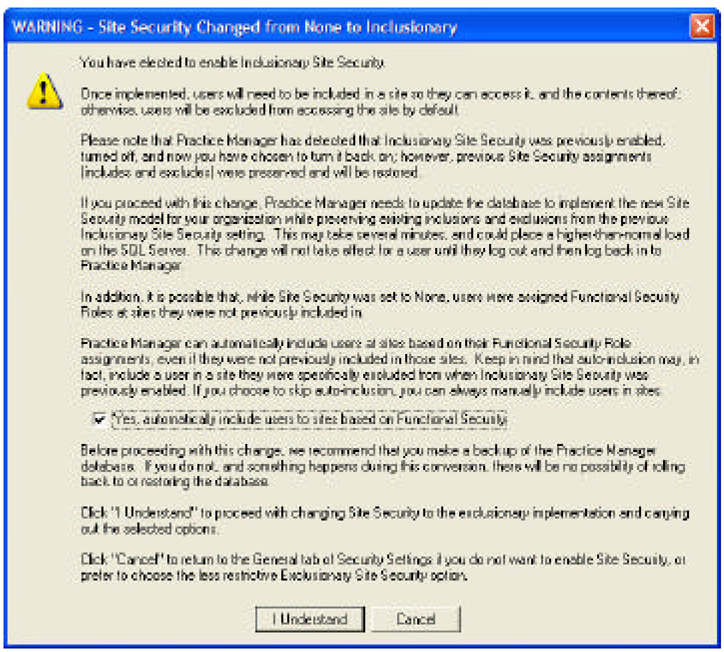


Only the owner of the database can change the Security System implementation. If a user, other than the owner of the database, with permission to administer Security Settings attempts to change the security model, the following message appears:

Changing the Site Security Implementation

None to Inclusionary

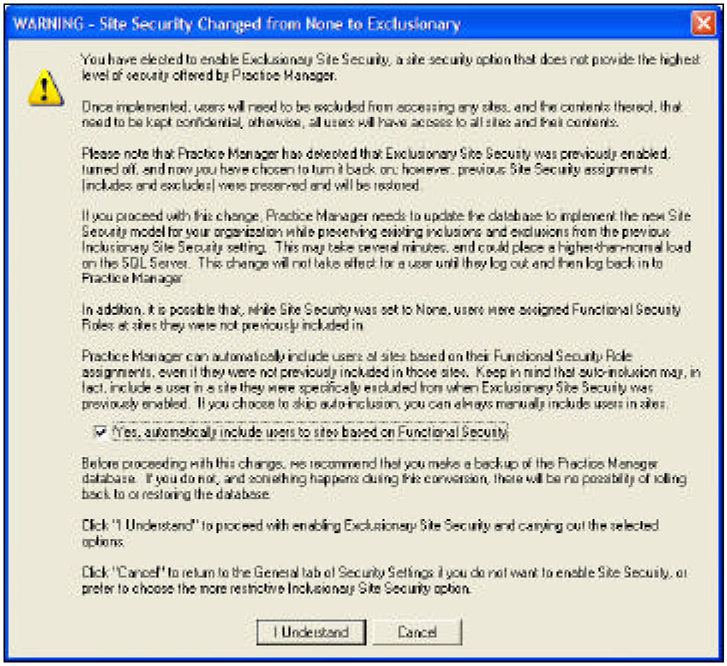
If you change the Site Security implementation from None to Inclusionary, the following message appears:



- You can have Practice Manager automatically include users in sites based on their functional security assignments. Without this, users will be able to login to a site, but they won't have permission to access any records on that site.

None to Exclusionary

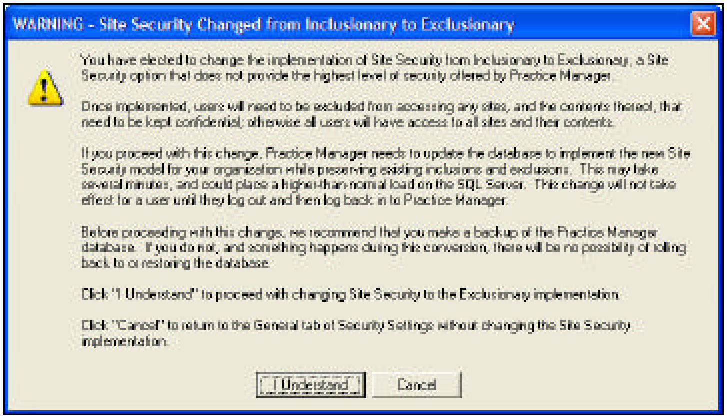
If you change the Site Security implementation from None to Exclusionary, the following message appears:



- You can have Practice Manager automatically include users in sites based on their functional security assignments. Without this, users will be able to login to a site, but they won’t have permission to access any records on that site.

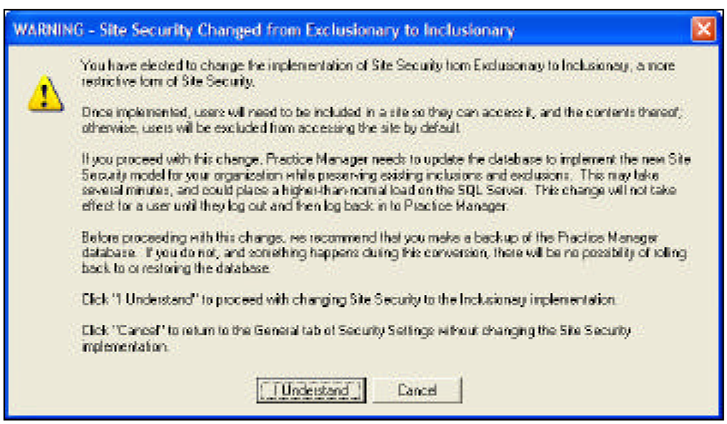
Inclusionary to Exclusionary

If you change the Site Security implementation from Inclusionary to Exclusionary, the following message appears:



Exclusionary to Inclusionary

If you change the Site Security implementation from Exclusionary to Inclusionary, the following message appears:



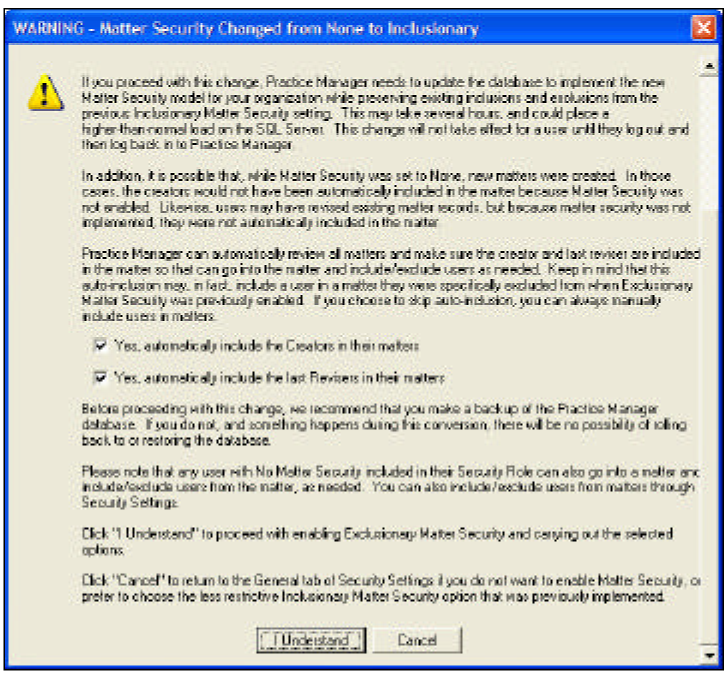
Disabling Site Security

If you change the Site Security implementation from Inclusionary or Exclusionary to None, the following message appears:

Changing the Matter Security Implementation

None to Inclusionary

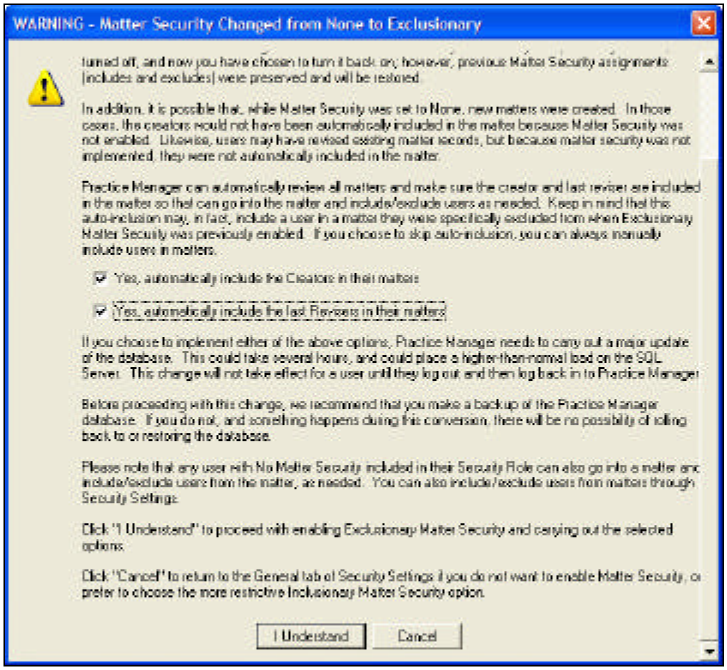
If you change the Matter Security implementation from None to Inclusionary, the following message appears:



- ➢ You can have Practice Manager automatically include the creators in their matters.
- ➢ You can have Practice Manager automatically include the last revisers of a matter in those matters.

None to Exclusionary

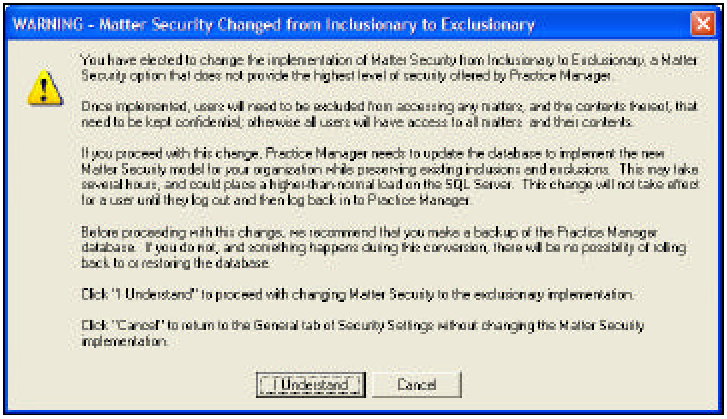
If you change the Matter Security implementation from None to Exclusionary, the following message appears:



- ➢ You can have Practice Manager automatically include the creators in their matters.
- ➢ You can have Practice Manager automatically include the last revisers of a matter in those matters.

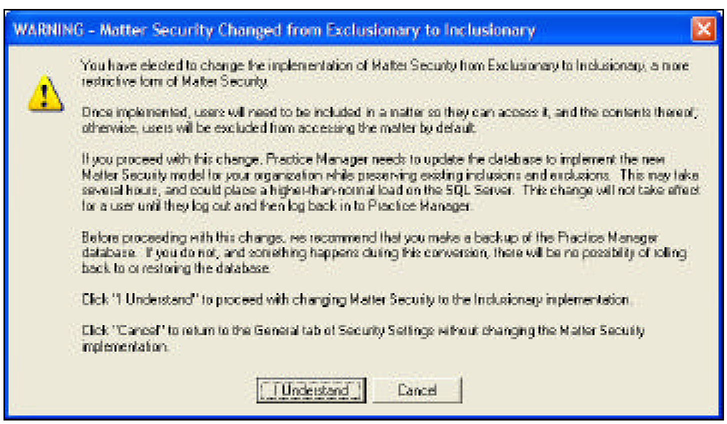
Inclusionary to Exclusionary

If you change the Matter Security implementation from Inclusionary to Exclusionary, the following message appears:



Exclusionary to Inclusionary

If you change the Matter Security implementation from Exclusionary to Inclusionary, the following message appears:



Disabling Matter Security

If you change the Matter Security implementation from Inclusionary or Exclusionary to None, the following message appears:

Tracking Previous Security Implementation

PCR 10269

Changing your security implementation in any of the following combinations creates unique issues within Practice Manager:

- Inclusionary => None => Exclusionary
- Exclusionary => None => Inclusionary

The issue arises because the security assignments in the Practice Manager database need to be reversed, just as if you carried out any of the following changes:

- Inclusionary => Exclusionary
- Exclusionary => Inclusionary

The issue is that there is an interim state of None, which makes it look more like you are carrying out the following:

- None => Exclusionary
- None => Inclusionary

These two changes do not require any conversion, but because there was a previous state of security that is in contrast with the newly selected state, Practice Manager treats it as if you are going from that previous state to the newly selected one. In other words…

- Inclusionary => None => Exclusionary
  is treated as
  Inclusionary => Exclusionary

- Exclusionary => None => Inclusionary
  is treated as
  Exclusionary => Inclusionary

To accomplish this in both matter security and site security, Practice Manager tracks the following:

- The current security implementation
- The previous security implementation
- The newly selected security implementation

There is, however, an issue with users upgrading from any version of Practice Manager 8.6, including SP1 and SP2. Practice Manager supported the following:

- None => Exclusionary
- None => Inclusionary
- Inclusionary => None
- Exclusionary => None

You could not change from Inclusionary to Exclusionary without the help of Client Services or Application support. Now that this release of Practice Manager supports switching the security implementation, it becomes necessary to know what security implementation, if any, was used before it was set to None. This requires a specific script to be manually run on the database. These scripts are in version the Changing_Securities folder for a Network Upgrade.

- If you turned off Matter Security in v8.6 and the previous state was Inclusionary, then you need to run oldMATsec_INC.sql.
- If you turned off Matter Security in v8.6 and the previous state was Exclusionary, then you need to run oldMATsec_EXC.sql.
- If you turned off Site Security in v8.6 and the previous state was Inclusionary, then you need to run oldSITEsec_INC.sql.
- If you turned off Site Security in v8.6 and the previous state was Exclusionary, then you need to run oldSITEsec_EXC.sql.

Now, if you had site security previously enabled and you want to remove all the old assignments and start over, you can run either of the following scripts:

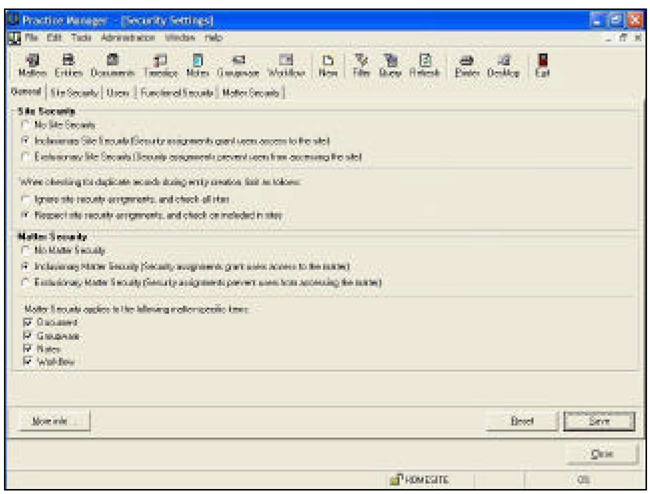
- For Matter Security, run oldMATsec_DEL.sql.
- For Site Security, run oldSITEsec_DEL.sql.

If you are not sure which scripts to run, please contact Practice Manager Application Support for assistance.

Configuring Duplicate Entity Checking for Site Security

PCR 9265

There are new options on the Security Settings - General tab for controlling how duplicate checking is carried out. This is the result of a potential security "hole" that advises the user when a duplicate entity is found on a site they do not have access to. The choices are to limit duplicate checking based on the user's site security assignments, or to check all sites, ignoring site security.



The options are listed under the heading When checking for duplicate records during entity creation, limit as follows: and work as described here:

Option	Function
Ignore site security assignments and check all sites	Practice Manager will ignore site security and report on found duplicates to the user, even if the duplicate was found on a site the user in excluded from. The does present a potential security "hole" in that users could simply enter an entity name, just to see if it does exist at a site they are excluded from.
Respect site security assignments, and check on included in sites	Practice Manager respects site security assignments for the active use, and only reports on duplicates found at sites the user is included in. This means that a duplicate could exist at a site the user is excluded from, but that duplicate would not be reported back to the user.

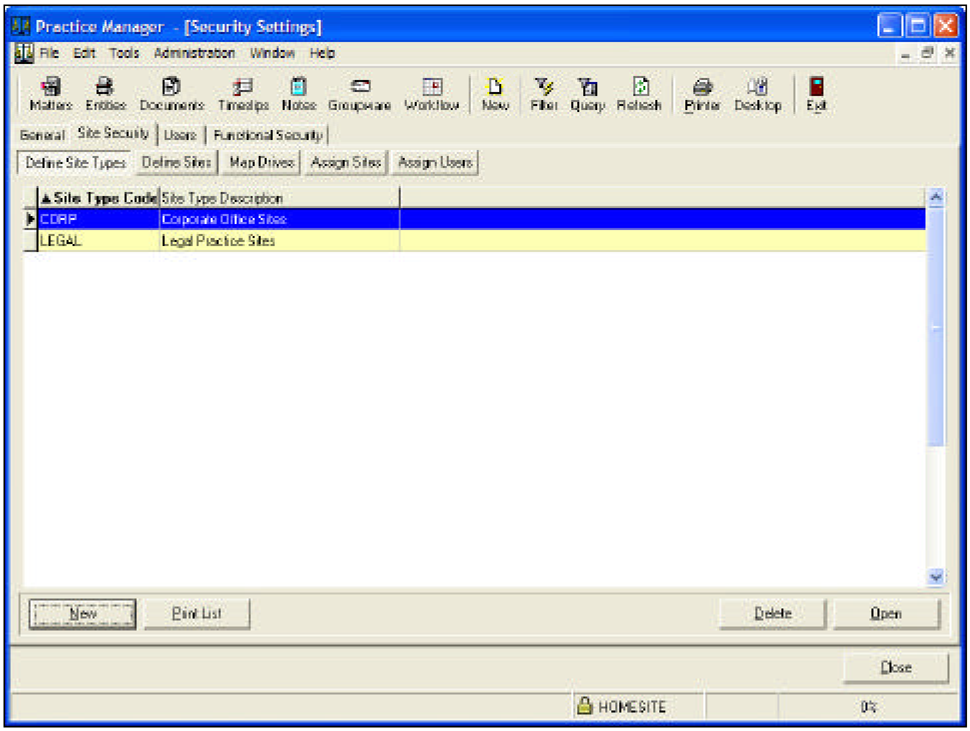
Working with Sites Types

PCR 8847

Site Type was introduced in preparation for the upcoming release of Practice Manager's Internet Portal Integration, as well as Site-specific Administration. When a Site is created, a Site Type is selected. Site Types allow Practice Manager Sites to be grouped logically based on their type. With Internet Portal Integration, we will divide sites into Legal/Law Sites and Portal Sites. This division allows a firm to segregate their data at a level higher than just site, thus keeping Practice Manager lists from become full of records that are not necessarily applicable to the day-to-day business functions of users at a specific block of sites. In the Internet Portal Integration, this segregation will prevent portal-specific documents from being mixed in with a firm's work product, though filtering will allow a user to see all records for all sites.

Beyond using Site Types to differentiate between legal and portal sites, Site Types can also be used to differentiate between different areas of business that an organization may be involved in. For example, if Practice Manager is used by a corporation, the in-house counsel may use Practice Manager for its law-specific functionality; however, corporate management may also want to take advantage of some of the more generic features, such as the ability to generate documents, manage workflow plans, and generate timeslips. In this instance, a Corporate Site Type could be created to differentiate between sites – and ultimately records – that are part of the corporate business unit, as opposed to the legal business unit. There are no limitations on the number of Site Types, so the possibilities for deploying Practice Manager in any business environment are somewhat limitless.

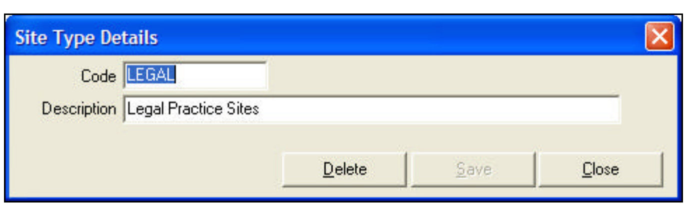
With Site Security enabled, Site Types are maintained through the Site Security tab (alternately, they can be maintained through Site Settings if Site Security is not enabled):



To Create a New Site Type

Carry out the following steps to create a new Site Type:

1. Click New. A blank Site Type Details window appears.
2. Enter a Code and Description.

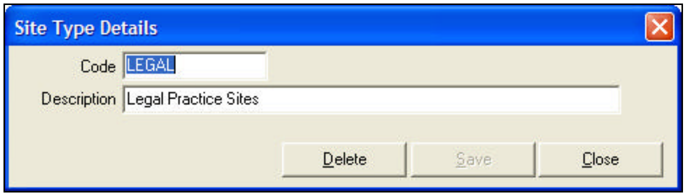


3. Save and Close as needed.

To Modify an Existing Site Type

Carry out the following steps to modify an existing Site Type:

1 Highlight the Site Type you want to edit, and click edit. The Site Type Details window appears with the previously entered values.

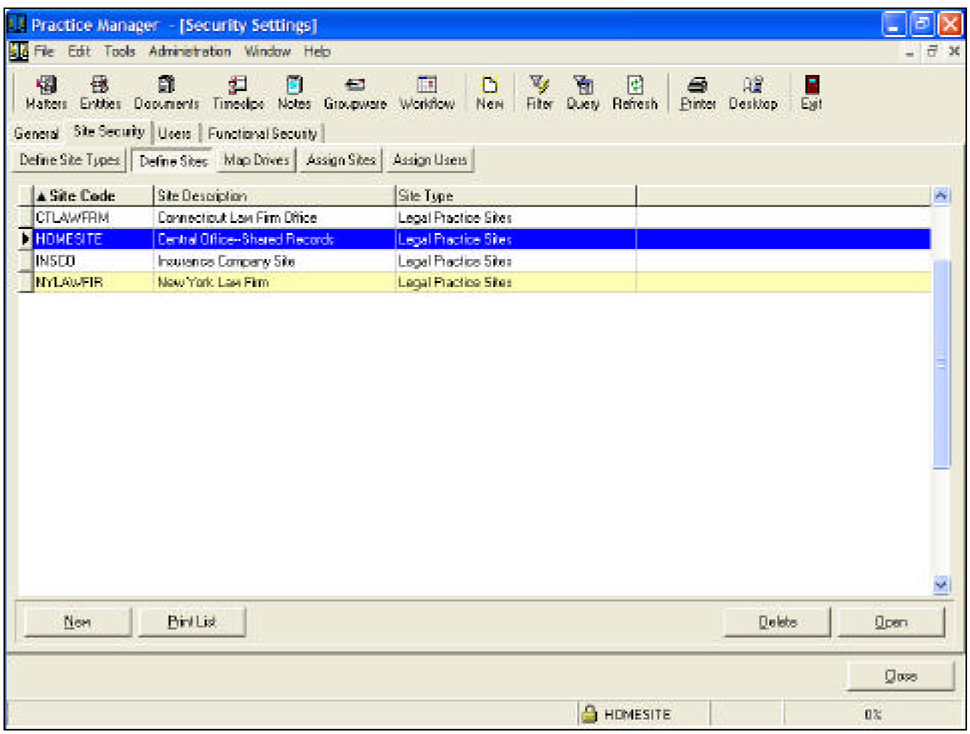


2 Modify the Code or Description as needed.

3 Save and Close as needed.

To Set the Site Type for a Site

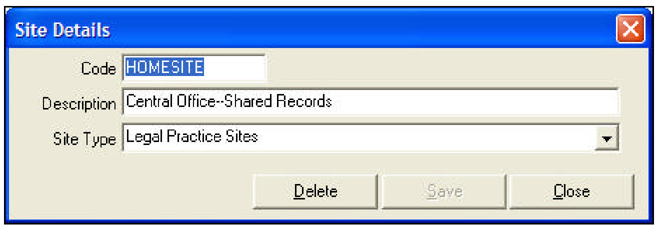
The Site Type column has been added to the listing of Sites:



Notes

When you upgraded from earlier versions of Practice Manager, a default Site Type was created – Legal Practice Sites. As Site Type did not exists before, it was assumed that all Sites were of the same Site Type and, because Practice Manager is first and foremost a tool for legal organizations, the default Site Type was used for all existing sites. If this is not the case in your organization, you should edit the description of the default Site Type. If you have more than one Site Type, you can add those and then edit existing sites so they use the appropriate Site Type. Changing the Site Type of a Site in Practice Manager currently does impact access to the records of that site, though users should be aware that additional Site Types may now be available at the time of login.

The Site Type field is found on the Site Details window.



- If the site is new, you select the Site Type when creating the record.
- If the site is existing, you can edit the Site record and pick a different Site Type.

Changes to Functional Security

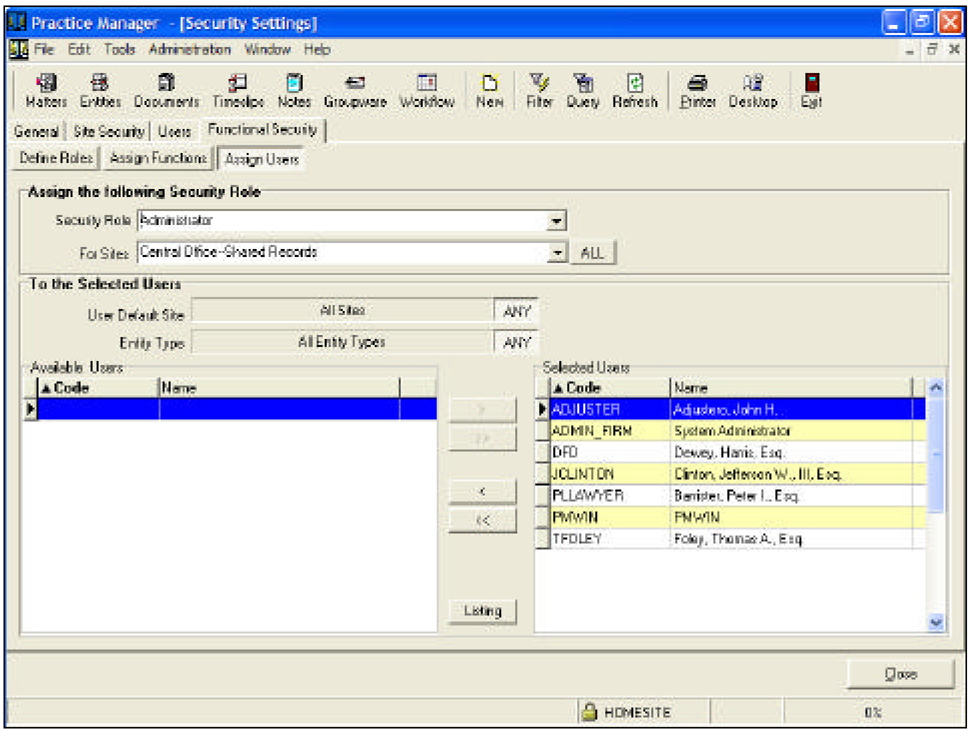
Several changes have been made to Practice Manager functional security, including the following:

- Functional Security Role Assignments are now site-specific, meaning a user can log in to more than one site and have a different role at each time.
- Change have been made to the list of available operations in Functional Security to accommodate new functionality in Practice Manager, as well as to enhance the management of the security roles.

Change to Functional Security Role Assignments

As stated before, Functional Security Role assignments are now Site-specific. When you assign a user a security role, you also choose the site at which that role is to be used. This allows the user to have different permissions at each site. For example, the user may be a Power User at the Atlanta site and a Guest User at the Denver site.

The Assign Users page of the Functional Security tab in Security Settings has not changed from Practice Manager 8.6:



The logic behind the assignments, however, has changed:

- When a functional security assignment is made, an inclusionary Site Security assignment is also created for that user at that site if Site Security is enabled. Without this, the user would be able to log in to the site, but would not be able to access any records at that site.
- When a functional security assignment is removed, no changes are made to Site Security, as Site Security assignments should be maintained through the Site Security tab.
- The log in process has been modified to respect the Site-specific assignments (for more information, see "???" beginning on page 2-1).

Changes to Functional Security Operations

PCR 9116, 9661,

New Functional Security Operations

The following functional security operations are new for this release of Practice Manager.

Security Function	Assigned…	Not Assigned…	Version	In PMProf?
Add New Entity Relationship	The user can create a new relationship between entities.	The user cannot create a new relationship between entities.	PM87	Yes
All Filter/Query Access	The user can access the filter and query functions on all listings.	The user cannot access the filter and query functions on all listings. The user can still carry out type-search on the listing.	PM87	Yes
Allow clear Billable field on Entity Record	The user can clear the Billable field on an entity record.	The user cannot clear the Billable field on an entity record.	PM87	Yes
Allow clear Client field on Entity Record	The user can clear the Client field on an entity record.	The user cannot clear the Client field on an entity record.	PM87	Yes
Edit Entity Relationship	The user can edit an existing relationship between two entities.	The user cannot edit an existing relationship between two entities.	PM87	Yes
Edit Standard Matter: Billing	The user can edit the information on the Billing tab of a standard matter.	The user cannot edit the information on the Billing tab of a standard matter.	PM87	Yes
Edit Standard Matter: Summary/Desc	The user can edit the information on the Summary/Desc tab of a standard matter.	The user cannot edit the information on the Summary/Desc tab of a standard matter.	PM87	Yes

Security Function	Assigned…	Not Assigned…	Version	In PMProf?
Open Desktop View - Manager	The user can open the Manager version of the Desktop View. This includes setting that view in Preferences.	The user cannot open the Manager version of the Desktop View. This mean the user can not set this view in Preferences.	PM87	Yes
Open Desktop View - Single User	The user can open the Single User version of the Desktop View. This includes setting that view in Preferences.	The user cannot open the Single User version of the Desktop View. This mean the user can not set this view in Preferences.	PM87	Yes
Open Desktop View - Two-Party	The user can open the Two-party version of the Desktop View. This includes setting that view in Preferences.	The user cannot open the Two-party User version of the Desktop View. This mean the user can not set this view in Preferences.	PM87	Yes
Outlook Access	The Microsoft Outlook menu item appears on the Tools menu, allowing the user to start Microsoft Outlook, if installed.	The Microsoft Outlook menu item does not appear on the Tools menu.	PM87	Yes
Remove Entity Relationships	The user can remove an existing relationship between two entities.	The user cannot remove an existing relationship between two entities.	PM87	Yes
Report Errors and Send Feedback	The user can report an error from an error message or Help menu using the new feedback form.	The user cannot report an error from an error message or Help menu using the new feedback form.	PM87 SP2	Yes

Security Function	Assigned…	Not Assigned…	Version	In PMProf?
Allow General Bar Numbers	The Require Bar Numbers and Bar Numbers button appears on the Entities-General tab so that bar numbers can be entered for any entity.	The Require Bar Numbers and Bar Numbers button does not appears on the Entities-General tab. It will continue to show on the Entity-Other Details tab for Staff and Judges.	PM87 SP2	Yes

Renamed Functional Security Operations

The following functional security operations have been renamed in these three releases of Practice Manager.

Original Functional Security Operation Description	New Functional Security Operation Description	In Version	Reason for Change
Change Personnel Information	Change Staff Information	PM87	Consistency with the entity data entry form. The field label was changed in a previous release of Practice Manager.
Change Site	Change Entity Home/Default Site	PM87	Consistency with the entity data entry form. The field label was changed in a previous release of Practice Manager.
Create Matter Number	Create Matter Number	PM87	Fixed description (Matter was repeated twice).
Open Annotation	Edit Annotation	PM87	Consistency with functional security operations added in PM85 and PM86.
Open Document Profile	Edit Document Profile	PM87	Consistency with functional security operations added in PM85 and PM86.
Open Entity Information	Edit Entity	PM87	Consistency with functional security operations added in PM85 and PM86.

Original Functional Security Operation Description	New Functional Security Operation Description	In Version	Reason for Change
Open Groupware Item	Edit Groupware Item	PM87	Consistency with functional security operations added in PM85 and PM86.
Open Issue	Edit Issue	PM87	Consistency with functional security operations added in PM85 and PM86.
Open Jurisdiction	Edit Jurisdiction	PM87	Consistency with functional security operations added in PM85 and PM86.
Open Matter Information	Edit Standard Matter: General	PM87	Consistency with functional security operations added in PM85 and PM86.
Open Note	Edit Note	PM87	Consistency with functional security operations added in PM85 and PM86.
Open Timeslip Information	Edit Timeslip	PM87	Consistency with functional security operations added in PM85 and PM86.
Open Workflow Information	Edit Workflow Item	PM87	Consistency with functional security operations added in PM85 and PM86.
View Entity Contact Listing	View Entity Relationships Listing	PM87	Consistency with the user interface. The field label was changed in a previous release of Practice Manager.
Show All Paths	Workflow: Show branches for all answers	PM87 SP1	Consistency with the user interface. The field label in Preferences was also changed. See "Show branches for all answers" beginning on page 8-61).

Removed Functional Security Operations

The following functional security operations have been removed from this release of Practice Manager.

Functional Security Operation Description	In Version	Reason for Change
Administer Label Settings	PM87	The Label Settings functionality, added in version 8.5, has been removed from Practice Manager.

Forms Designer and Auxiliary Settings

There are 55 Forms Designer-related PCRs and 7 Auxiliary-related PCRs addressed in these releases of Practice Manager, including but not limited to the following::

PCR	Description	In Version
6540	The entity auxiliary now appears in the correct tab position based on the value selected.	PM87
8485	The document auxiliary now appears in the correct tab position based on the value selected.	PM87
7827	The social security mask has been updated so that it uses 000-00-0000 for individuals, 00-0000000 for organizations, and no mask when International Format is enabled in System Settings.	PM87
9129, 9130, 9491 and 9659	Matter, entity and document auxiliaries now respect the same security settings as their parent records, including Site Security.	PM87
7315	The entity look-up fields on annotation forms created with FormsDesigner now respect Site Security.	PM87
7703	Launching FormsDesigner from the Practice Manager Tools menu no longer requires a separate login, as the active Practice Manager login is used.	PM87
9150	Auxiliaries now respect the new Grid settings from the Preferences – Appearance tab.	PM87
9656	The Cancel button has been changed to Close, and the OK button has been changed to Save. Note that existing buttons on forms are not automatically changed. You will need to go into each form and make this update.	PM87
2210	DateCreated and DateRevised is automatically added to all FormsDesigner tables.	PM87 SP1

PCR	Description	In Version
5625	FormsDesigner has been updated to be fully MS SQL 2000 compliant.	PM87 SP1
11527	The convert.exe utility, which changes apostrophes to quotes in Forms Designer form SQL statements, must be copied to the <pmroot> folder in order to run. It cannot be run from the utilities/ subfolder.	PM87 SP1
12020	In FormsDesigner, when a field is defined as a memo field, the checkboxes for In Listing, Index and In Filter are disabled, as memo fields cannot be included on the listing or used in queries. If fields already exist in FormsDesigner where these fields have been enabled for Listings, Indexes or Filters, the field is automatically disabled to avoid problems. In an upcoming release of Practice Manager, these fields will be disabled if Memo is selected as the field type.	PM87 SP1

Install and Upgrade Programs

There are 167 Install and Upgrade-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

PCR	Description	In Version
8225	WordXP has been added to the list of available word processing engines for document assembly.	PM87
8254, 9769 and 9771	RightFax configuration has been added to the list of available options. When selected, a configuration window appears.	PM87
8363	A new version manager has been implemented for tracking that the appropriate versions have been installed. For more information, see "Version Control Checking and Details" beginning on page 11-1)	PM87
8404	Corel 7 and Word 85 have been removed from the list of available word processing engines for document assembly.	PM87
8405	Corel 2002 (10) has been added to the list of available word processing engines for document assembly.	PM87
8456	The workstation where you carry out the network installation from no longer has to have MSSQL Server installed.	PM87

PCR	Description	In Version
8460	Upgrade programs have been added to Practice Manager to support migration from earlier versions of Practice Manager. At this time, we support upgrades from the following releases: • 8.0.74.x and higher • 8.5.62.x and higher • 8.6.11.x and higher Upgrade Preparation – If your organization's database is not on one of these versions, we have provided the necessary scripts for upgrading the database on the Practice Manager Upgrade CD and Web site. These files are available in the Upgrade Preparation folders: • upg_prep80 • upg_prep85 • upg_prep86	PM87
8470	Creators and the last reviser of matters are automatically included in the matter if matter security is enabled.	PM87
8834	If a workflow item is not assigned to a site, the default site of the creator is used.	PM87
8909	Initials are now required for users on the Entity – Other Details tab. This was not the case in earlier releases of Practice Manager. As part of the upgrade, any user that does not have the Initials field populated, it will now be populated with their Code by default. It can then be manually changed in the entity record.	PM87
9328	Because Code was added to Law Type, we have included a conversion logic for pre-PM85 databases as follows (note that you can modify the code at any time after the conversion with no adverse effects): • For the First Law Category... And the first Law Type in that Category, use the first 6 letters of the Law Category Code, with "01" appended. For example, if the Law Category is GENERAL, use GENERA01 for the first Law Type Code (we tried coming up with a way to use a truncated part of the Law Type Description, but this was so incredibly complex, it was probably not worth it, and might not work). For each subsequent Law Type within a Category, increment the appended number by 1. • For the next Law Category, repeat the process; however, compare the first assembled Law Type Code	PM87

PCR	Description	In Version
	of that category with previously assembled Law Type Codes. If it creates a duplicate, reduce the number of letters to 5, and change the number to "001". For each remaining Law Category, repeat this process.	
9343 and 9345	If there are no existing Matter Types, then a Default Matter Type is created and automatically assigned to all Law Types. In order to create a Litigation-specific matter, you must select a Matter Type.	PM87
9708	The install program now uses Microsoft Installer v2.0. This is required for the installation of MSXML v3.0 SP2, which is also used by the install program. If you do not have Microsoft Installer v2.0 installed, the install program gives you the option of going to the Microsoft download site, and downloading and installing this software.	PM87
9943	Additional error logging information has been provided in the upgrade scripts to handle “problem” databases (i.e., those that have non-standard or undocumented customizations applied).	PM87 SP1
11003	During upgrade, if you are backing up the current installation of Practice Manager, and a file is in use, you now have the option to retry backing up that file or skipping.	PM87 SP1
11100	During install or upgrade, the setup program now checks the server collation to see if the configuration is supported. If it is supported, the install or upgrade proceeds as normal. If it is not supported, the install or upgrade is terminated with a message. Supported server collations are as follows: • For SQL 2000:Dictionary order, case-insensitive, accent-insensitive, for use with 1252 character set. This collation uses the dictionary sorting rules for the U.S. English character set (code page 1252 – Windows Latin 1 ANSI, sort order ID 54). Uppercase or lowercase characters and accent marks are not considered when sorting. In Transact-SQL, the string SQL_Latin1_General_CP1_CI_AI is used to designate this setting. • For SQL7: Sort Order =52 Dictionary order, case-insensitive, for use with 1252 character set.	PM87 SP1
11101	The backup folder created during upgrade (optional), is now placed inside the <pmroot> folder.	PM87 SP1
11493	When you install Practice Manager Server and select the path to PM as seen by workstations connected to the server, that mapping must exist for the workstation BEFORE they run the Workstation Install or attempt to	PM87 SP1

PCR	Description	In Version
	connect to Practice Manager. For example, if you have the following server path to the <pmroot> folder: //das01/d/apps/reallegal/pm And you indicate that the following is the path to Practice Manager during the Network install T:/reallegal/pm The workstation must have T:\ mapped to //das01/d/apps/ or Practice Manager will not install or run correctly. And, as noted in PCR 12264, the user must have Read/Write permission to that folder. Note that the path to the <pmroot> folder is stored in System Settings within Practice Manager, and determines where Practice Manager files are installed.	
11690	For installs, the last field for each phone number now accepts five characters to allow for changes in international phone number formats.	PM87 SP1
11819 and 11821	A new command line switch (/register) has been added to client install/upgrade that allows all installed executable and COM objects to be registered automatically on the workstation during the install or upgrade.	PM87 SP1
12264	Practice Manager users must have Read/Write permission to the <pmroot> folder. This is due to the fact, that our licensing mechanism has to be able to read and write information into special encrypted files, so that PMWIN would be able to track number of active users	PM87 SP1
12298	The registration files have been moved to a /reg/ folder inside of <pmroot> folder so that read-only rights can be applied to the <pmroot> folder. Users must have read/write permissions to the <pmroot>/reg/ folder so that licensing can be properly incremented at login.	PM87 SP1
12319	Your SQL Server should be configured to update all indexes in the Practice Manager database at least once a week, preferably during non-working hours.	PM87 SP1
12333	The minimum recommended folder level security for a Practice Manager installation is now as follows: <pmroot>\ : Read Only <pmroot>\CAPTIONS\ : Read/Write Created dynamically as needed <pmroot>\CLIENT_INS\ : Read Only Created by install or upgrade	PM87 SP1

PCR	Description	In Version
	<pmroot>\CLIENT_UPG\ : Read Only Created by upgrade <pmroot>\COS\ : Read/Write Created dynamically as needed <pmroot>\CSS\ : Read Only Created by install or upgrade <pmroot>\DOC\ : Read Only Created by install or upgrade <pmroot>\DOCCOMPS\ : Read/Write Created dynamically as needed <pmroot>\HDANSWER\ : Read/Write Created dynamically as needed <pmroot>\HELP\ : Read Only Created by install or upgrade <pmroot>\IMAGES\ : Read Only Created by install or upgrade <pmroot>\IMGVIEW\ : Read Only Created by install or upgrade <pmroot>\LOGS\ : Read/Write Created dynamically as needed <pmroot>\MACROS\ : Read Only Created by install or upgrade <pmroot>\PLUGINS\ : Read Only Created by install or upgrade <pmroot>\PMPURGER\ : Read Only Created by install or upgrade <pmroot>\REG\ : Read/Write Created by install or upgrade <pmroot>\PMREMOTE_INS\ : Read Only Created by install or upgrade <pmroot>\PMREMOTE_UPG\ : Read Only Created by upgrade <pmroot>\PM_SQL\ : Read Only Created by install or upgrade <pmroot>\TIFFVIEW\ : Read Only Created by install or upgrade <pmroot>\UTILITIES\ : Read Only Created by install or upgrade	

PCR	Description	In Version
	Note that, if you apply such a security model, the user who runs any future upgrades must have full access to the <pmroot> folder and all subfolders so that the upgrade can be successfully be carried out.	
12429	An option has been added to the upgrade program to automatically upgrade the Word Processor for existing components. This upgrade is handled as follows: • Select your existing word processor • Select your new word processor Conversion options are as follows: • If you select Word97 as your existing word processor, you can choose from Word2000 or WordXP. • If you select Word2000 as you existing word processor, you can choose from WordXP. • If you select Corel 8 as your existing word processor, you can choose from Corel 2000 (9) or Corel 2002 (10). • If you select Corel 2000 (9) as you existing word processor, you can choose from Corel 2002 (10).	PM87 SP1
12571	Microsoft SQL Agent must not be installed and running on the SQL server in order to carry out an install or upgrade.	PM87 SP1
13411	The network server install/upgrade no longer requires the workstation or console to have a screen resolution of 800 x 600. The resolution can be as low as 640 x 480. This is to support older server consoles. The workstation install/upgrade still requires the workstation to have a resolution of 800 x 600 or higher.	PM87 SP2
13591	ESD files that were installed on the server are now removed by the server uninstall program.	PM87 SP2
13709, 13734, and 13823	Practice Manager installs and upgrades not support NT Authentication for connecting to the database.	PM87 SP2A

For more information, refer to the RealLegal Practice Manager Installation and Upgrade Manual.

Utilities

There are 40 Utility-related PCRs addressed in these releases of Practice Manager, including but not limited to the following:

The following utilities have been added in these releases of Practice Manager.

For information on all utilities release for Practice Manager, refer to the start.htm file in the <pmroot>\utilities\ folder.

PMTemplate.exe

PCRs 9941, 10931, 10933, 11349, 11388, 11390, 11397, 11399, and 11605

This utility was designed to replace merge field codes in Practice Manager document assembly components that have been renamed in the database, causing them to no longer merge when assembling a document.

This utility uses the concept of ChangeSets to track the changes in Practice Manager. Once a ChangeSet has been applied to a component, it does not and should not be run again on that component. Practice Manager keeps track of which ChangeSets have been applied to which components.

When a ChangeSet has not been applied to any components, it has a status of "Not Started". When a ChangeSet has been applied to some, but not all components, it has a status of "In Progress". When a ChangeSet has been applied to all components, the status is changed to "Completed".

From within Practice Manager, this utility is automatically called when an Entity Type or Entity Role Description is changed for an Entity Type or Entity Role that is used in document assembly. No interaction is needed. The only time PMTEMPLATE should be run manually is after an upgraded, or if Not Started or In Progress ChangeSets exist.

The following step should be carefully followed when executing this utility manually.

Before Running PMTEMPLATE

If this is the first time you have run PMTEMPLATE, we recommended that you first run MSWDAFIX.EXE. Follow the EXACT procedure in MSWDAFIX.txt.

Running PMTEMPLATE

From the <pmroot>\utilities\ folder…

1. Start PMTEMPLATE.EXE.

   If you have already PMTEMPLATE.EXE, then restored the component files from a backup copy, and you are rerunning as instructed, then started PMTEMPLATE.EXE with a /D switch.

2. Click Connect.
3. Choose Microsoft OLE DB Provider for SQL Server. Click Next.
4. Select a Server.
5. Enter a User name and Password.
6. Choose a Database.
7. Click OK.
8. A list of ChangeSets appears.

   If you are rerunning PMTEMPLATE.EXE, click on each ChangeSet and choose Update to Not Started.

9. Click Go. The Recent Log tab becomes active, showing exactly what has been carried out.
10. When finished, click Exit.

You should review errors.log for any logged errors that may have occurred, and take the necessary corrective action.

MSWDAFIX.EXE

PCRs 12425 and 12505

This utility was designed to repair Practice Manager document assembly components that have become corrupted over time, or will no longer work properly with the latest version of Practice Manager. The following step should be carefully followed when executing this utility.

As a note, when the existing components are updated, the contents of the original component file, as well as the styles and page layout, are included. Any component-specific macros or toolbars are not migrated to the new file.

If you have run MSWDAFIX before...

You need to restore the backups from the individual backup folders. Use the following procedure (the example is for DOCCOMPS\templates\):

1. Start - Run, type Command, displaying a DOS window.
2. Change to the BACKUP folder for TEMPLATES.
3. Type "dir /b >files.txt".
4. In Windows explorer, double-click on files.txt.
5. Start Excel.
6. Copy the contents of files.txt and paste into Column B and C. Note that C will still be highlighted after pasting.
7. Choose Edit - Replace.
8. Type "_bak" in the Find field and leave the Replace field blank. Click Replace All.
9. In Column A, enter "ren" in everything line containing a filename.
10. Copy the contents of the Excel file (Columns A, B, and C, all populated lines) and paste into files.txt.
11. Save As "files.bat".
12. Switch to Windows Explorer and double-click on files.bat. This renames all the backup files to their original name.
13. Delete files.txt and files.bat.
14. Copy the contents of the BACKUP folder to the TEMPLATES folder, overwriting the existing files
15. Repeat for each folder:
    - CAPTIONS\
    - COS\
    - DOCCOMPS\ADDRTMPL\
    - DOCCOMPS\B-PLATE\

- DOCCOMPS\CAPTIONS\
- DOCCOMPS\COS\
- DOCCOMPS\ENTTEMPL\
- DOCCOMPS\LETRHEAD\

Before Running MSWDAFIX

Before you run MSWDAFIX, you should carry out the following:

1. You need to calculate the amount of disk space you will need in order to carry out the execution of this utility. In the <pmroot> folder...
   - Right-click on the CAPTIONS folder and choose Properties. Write down the "Size on Disk" value, typically in megabytes (MB). You will need to convert, if not.
   - Right-click on the COS folder and choose Properties. Write down the "Size on Disk" value, typically in megabytes (MB). You will need to convert, if not.
   - Right-click on the DOCCOMPS folder and choose Properties. Write down the "Size on Disk" value, typically in megabytes (MB). You will need to convert, if not.
2. Add up the three numbers from above, and multiply by 2.
3. Check the disk space of the hard drive, and make sure there is more disk space available than that calculated in Step 2. If you have enough disk space, you are ready to go. If not, you need to free up some disk space before continuing.

Running MSWDAFIX

From the <pmroot>\utilities\ folder…

4. Start MSWDAFIX.exe.
5. Enter the Server Name, Database name, User name, user Password, PM Root Directory, and select a target engine.
6. Check which components you want to convert.

   It is recommended that you only do one at a time if you have a large number of components.

   Remember, CAPTIONS\ and COS\ can be quite large, especially if you have one for each matter. A logical grouping would be to run the DOCCOMPS folders first, then CAPTIONS, and then COS.

7 When finished, you should run PMTEMPLATE.EXE.

After You Run MSWDAFIX

You should check the logs to see what actions were carried out and what errors were recorded, and take the necessary corrective action.

- w97conver_process.log contains a list of all actions that were carried out.
- w97convert_errors.log contains a list of all recorded errors.

You should review each of the following folders, to see that all files have today's date:

- CAPTIONS\
- COS\
- DOCCOMPS\ADDRTMPL\
- DOCCOMPS\B-PLATE\
- DOCCOMPS\CAPTIONS\
- DOCCOMPS\COS\
- DOCCOMPS\ENTTEMPL\
- DOCCOMPS\LETRHEAD\
- DOCCOMPS\TEMPLATE\

If a file does not have today's date -- that is, the date on the file is older than the day on which you ran MSWDAFIX, it most like meets one of the following criteria:

- It was created for use with WordPerfect. Those files are not updated by MSWDAFIX.
- It is a component that is no longer used. In previous versions of Practice Manager, deleting a document assembly component record did not actually delete the component file. This was changed in version 8.6.

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Glossary

A – E

Commands Items that appear on the Practice Manager Menus and that allow a user to complete a task.

Command buttons Usually a rectangular button that is located on a window or dialog box and carries out a command.

Data window A type of window in Practice Manager that is used to enter information into Practice Manager about a particular data record such as a matter, entity, document, timeslip, note, e-mail message, task, appointment, or workflow plan. Data windows often consist of multiple tabs that contain data entry fields, listings of records, or both.

This is also referred to as a Data Entry Form or just DE Form.

Document Text, graphic, or multimedia files that are generated by or maintained in PM. Examples of document files include: correspondence, legal documents, forms, reports, research results, medical or financial records, personnel records, transcripts, photographs, and tape or video recordings.

Document Profile A record that that must be created for all incoming or outgoing documents in PM. Document profiles capture summary information about a document such as its date, description, category, type, author, location, and the application used to generate the document.

Entity A set of data records that pertain to either an individual or an organization. Such records can include names, addresses, telephone numbers, birth dates, occupations, and relationships to other records stored in Practice Manager.

Entity Role A label that is applied to an entity when the entity is assigned to a specific matter. The entity role characterizes the function an entity serves within the framework of the matter. Entities can be assigned to several matters and may be assigned different roles within each matter. Examples of entity roles include: Lead Attorney vs. Co-Counsel, Treating Physician vs. Expert, Client vs. Adverse Party, etc. Choices that appear when selecting an entity role are dependent upon the law type selected for each matter. Entity roles appear only on the Matter Entity listing and provide a quick summary of all entities associated with a matter. See also, *Entity Type*.

Entity Type A label that is assigned to each entity record as it is created and that often characterizes the entity's occupation in life. Examples of entity types include: Attorney, Doctor, Insurance Adjuster, Court Reporter, etc. Entity types generally do not change for an entity record while it exists in the PM database and appear on the Global Entity listing for easy grouping of similar entity records. See also, *Entity Role*.

F – J

Filtered List box A form of drop-down list box that is unique to PM. The Filtered list box is associated with a faucet-shaped control that indicates the items that appear in the list can be limited for display.

Filters A tool provided with PM that allows you to search for data records from any available listing. Filters can be created and applied immediately to a listing or saved and applied to a listing at a later date. See also, *Query*.

Global listings A PM window that displays a list of all records of one type regardless of their relationship to a specific matter. See also, *Matter listings*.

K – O

Law category A descriptive term that classifies related law types used in your organization's business. Categories are defined by each organization when Practice Manager is first implemented and are used primarily to simplify administrative-level tasks. See also, *Category*.

Law type A descriptive term that classifies areas of law used in your organization's business. Law types are defined by each organization when Practice Manager is first implemented and are used to control the kind of information recorded about a matter.

Listings A window that displays Practice Manager records in a table format for easy access and organization. Listings allow you to see several entries at once and allow you to customize the table layout. See also, *Global listings* and *Matter listings*.

List window A type of window in Practice Manager that is used to display records in a columnar or grid format and enables you to view many records at once. List windows often contain check boxes, options, and shortcut menus that allow you to sort, filter, and access records.

Login window A window that may appear when Practice Manager is started. The Login window displays licensing and versioning information and may require users to enter a login name and password before proceeding.

Matter A set of data records that pertain to a single instance of your organization's business such as a legal case file or insurance claim. Such records can include case names, file numbers, summary or descriptive information, budget or billing information, individuals or organizations associated with the matter, and relationships to other records stored in Practice Manager.

Matter listings A PM window that displays records of all types that are related to a specific matter. See also, *Global listings*.

Menu bar A horizontal bar located directly beneath the Title bar on the Practice Manager window. This bar provides access to Menus and Commands for commonly used tasks.

Notes An electronic record of any type of communication (formal and informal discussions, phone calls, negotiations, research, etc.) that contains any type of content (remarks, explanations, comments, observations, or annotations, etc.). Notes can be associated with one or more matters, entities, or both.

P – T

PM window The window that appears once you have successfully logged on to the Practice Manager program. Components of the PM window include a title bar, menu bar, menus, command buttons, work area, and a status bar.

Preferences A command on the Edit menu that allows users to customize the PM environment to meet their individual needs.

Query A tool provided with PM that allows you to search for data records from any available listing. Queries utilize Boolean logic to create query statements and query groups. Queries can be created and applied immediately to a listing or saved and applied to a listing at a later date. See also, *Filters*, *Query Statements*, and *Query Groups*.

Query Groups A series of query statements that are assembled together to form a query. See also, *Query* and *Query Statements*.

Query Statements A Boolean search expression used in the creation of a Query. Query statements consist of three parts: search field, operator, and search value. See also, *Query* and *Query Groups*.

Quick Filter options Options that appear on the Quick Filter bar when a Global or Matter listing is displayed. These options allow users to control the amount and type of information that appears in a listing. See also, *Quick Filter toolbar*.

Quick Filter bar A toolbar that appears below the PM toolbar when a Global or Matter listing is displayed. The toolbar contains several filtering options that vary based on the type of listing that is displayed. See also, *Quick Filter options*.

Quick Search A method of searching for records in any PM List window. This method requires that you select a text-based column heading and begin typing a search string that contains the first few letters of the item you are searching for.

Retrieve Listing box A form of drop-down list box that is unique to PM. The Retrieve Listing box is associated with a cowboy-shaped control that retrieves and displays the appropriate Global listing needed to populate a data field.

Title bar A horizontal bar located at the top of the Practice Manager window that displays the name of the current program or window. The Title bar also contains control buttons that allow you to minimize, maximize, or close Practice Manager.

Selection window A type of window in Practice Manager that is used to customize settings or make choices when relating records. Selection windows often contain two selection panes, command buttons, and a taskbar.

Status bar A horizontal bar located at the bottom of the Practice Manager window that displays status information such as a matter name, matter number, or client number, the amount of time a matter has been opened, the site the current user is logged on to, and a percentage indicator for any activities in progress.

Timeslip Calendar An alternative method for working with time and expense entries in PM that displays daily summaries of time and expenses charges per timekeeper.

Timeslip Calendar toolbar A toolbar that appears below the PM toolbar when either the Global Timeslip Calendar or Matter Timeslip Calendar is displayed. The toolbar contains buttons that allow you to view timeslip entries on a monthly or weekly basis.

Timeslips Time and expense records generated by members of your organization.

U – Z

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