

Practice Manager, Version 8.6

Release Notes 8.6.11.1

Version No.	Date	Prepared By	Brief Description of Turnover
8.6.11.1	6/15/2001	Darius Kirna	This turnover is from development team to QA

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Practice Manager, Version 8.6 • Release Notes 8.6.11.1

Created on June 14, 2001

By QA.

Revision No. **40**, Last Saved on **June 14, 2001**

By QA

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History

Version No.	Date	Prepared By	Brief Description of Turnover
1.0.1	06/14/2001	QA	This turnover explains what new features were added into product, what problems were done since last turnover, what issues left. Also it has instructions how to install the product. New release 8.6.11.1 of Practice Manager.

Presentation Development Team

The following members of the Presentation Development Team were involved in the preparation of this turnover to quality assurance.

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Comments	

Comments	
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Comments	



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Comments		

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Comments		

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Comments		

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Comments		

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Comments		

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Comments		

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Comments	

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1. Summary Description of Turnover

1.1. New Features

New Items are in bold.				
Included in Version	PCR # or Spec	Feature Description	Comments or Special Instructions	Name of Engineer
PM86.1.1		Publish points for integration with various adapters support.	These are the points in the Practice Manager application where important events are occurring. By publishing these points for outside applications it is possible to develop independent modules and other applications that would perform certain actions depending on Practice Manager state.	Airenas, Audrius, Erikas, Ruslan, Saulius
PM86.1.1		ADO support.	All calls to the MS SQL database server Practice Manager were rewritten using ADO library. This allows higher data manipulation speeds and higher reliability and design flexibility.	Airenas, Audrius, Erikas, Saulius
PM86.1.4	5397	Added login name functionality so that ENTITY CODE would not be used to identify user when logging in.	Implemented login name functionality to support Windows NT and MS SQL log name lengths and separate Entity CODE that is used in visual representations from Login name that is used by user to logon.	Saulius, Darius
PM86.1.4	5391/5393	Additional fields and functionality in Address book to support integrations.		Saulius, Darius
PM86.1.4	5420	Entity DE - Assign/Copy Parent Address window. Add an ability to select one or multiple adress(s) to be assigned or copied from parent organization.		Saulius
PM86.4.1		New design of document templates screen		Erikas
PM86.4.1	5693	Implement PDF files usage in help menu.	To this end, we need to change the Help menu from the	Saulius

Included in Version	PCR # or Spec	Feature Description	Comments or Special Instructions	Name of Engineer
			<p>following: User Help Administrator Help ----- About To the following: Getting Started Guide <== Link to help\pm.gs.pdf ----- User's Guide <== Link to help\pm.ug.pdf Administrator's Guide <== Link to help\pm.ag.pdf ----- Install Acrobat Reader <== Link to help\areader.exe I have placed a "help" folder for testing these links in \\Tornado\PMT_Shared_Info\Dev\Andes\tupungato\specs\pm.helpdoc. As soon as I get the real PDF files from Gayle, I will update the files in this folder and let you know. The person who makes these changes should download the latest install version of Adobe Acrobat, place it in this "help" folder, delete the old EXE, and rename the new downloaded file to areader.exe (I figure it would be best if we used a standard name instead of the download name so that we can update this install program at any time without having to change Practice Manager).</p>	
PM86.4.1	5712	Login Screen: Add [OK] and [Cancel] buttons below the password... we'll move the fields up a bit to make room.		Saulius
PM86.4.1	5784	Implement "Change Party" security function.	"Change Party" functionality should be as follows: 1) If assigned to a user, then user can edit Party Type field in entity-party DE. "Party" check box is enabled. 2) If not assigned to a user, then Party Type field in entity-party DE is disabled. "Party" check box is disabled. (When editing a party, there is a possibility to do that entity assigned to a matter as not party.)	Saulius
PM86.5.1	5618	PM86 changes to the Workflow Listing Quick Filter	The current entity control is a drop-down list that displays all Personnel. We need to change this so the entity control is now a FaucetFilter/CowboyHat combination, like the one found on the document profile. The FaucetFilter should list all personnel. The CowboyHat should display the Global Entity Look-up Grid. Entity Code should populate the first field, and should be what the typed entry searches on, just like on the Document	Saulius

Included in Version	PCR # or Spec	Feature Description	Comments or Special Instructions	Name of Engineer
			Profile. Entity Name field should be read-only, and should contain the name of the selected entity, just like on the Document Profile. ALL should continue to just show All Personnel.	
PM86.5.1	5847	Change Help - About to use the new prototype at \\Tornado\PM Shared_Info\Dev\Andes\tupungato\specs\pm.common\mockups\pm.about.sample.jpg	This dialog is basically the exact same as the login dialog, but I have replaced Login/Password with Current User Name, SQL Server Name, and PM Database Name in a box.	Saulius
PM86.6.1		Modify the list filter for document assembly assignment to be radio buttons instead of check boxes. After much thought, it was decided that this would be more intuitive for users, or at least easier to train.		Ruslan
PM86.6.1		Take a quick look at your forms and messages and, anywhere you find "Player", replace with "Entity" "Players", replace with "Entities"		Airenas, Saulius, Audrius, Ruslan, Erikas
PM86.6.1	4517	Allow the Matter Types to be assigned to one or more Law Types		Airenas
PM8.6.8.1		Implemented, fixed site securities on global listings, mater and entities related listings. Some DE forms.		Airenas, Audrius, Saulius

1.2. Resolved Issues and Problems

New Items are in bold.				
Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.1.1	5076	Doc Assembly settings. Multi-Components tab. Group Members window. Hit ADD > Select Template > Ok > General SQL Error.	Fixed	Ruslan
PM86.1.1	5101	Create Document Profile, Select Issues- More - Create New - Query issue: Field DateCreated not found	Fixed	Audrius
PM86.1.1	5112	Matter: Plaintiff: Insurance tab. Hit new > Insurance Data Entry window appears. Hit Arrow button next to Insurance Carrier field > Address Book listing appears. Type Category is "Insurance Carrier". Select an entity from this listing and hit Select > gen an error: "Invalid object name '#party'." The selected entity is displayed as Insurance Carrier, but OK button is disabled in Insurance Data Entry window.	Fixed	Airenas
PM86.1.1	5113	Matter: Timeslip listing. Hit New > fill Timekeeper, Matter, Date, Transaction, Hours and Rate fields > hit Save > get a message: "Multiple-step operation generated errors. Check each status value." But timeslip is saved.	Fixed	Audrius
PM86.1.1	5118	Matter: Plaintiff: Special Damages tab. If there is an entity assigned here, you cannot delete it: hit Delete > get a message: "Are you sure you want to delete current record" > YES > get an error: "Parameter object is improperly defined. Inconsistent or incomplete information was provided."	Fixed.	Airenas
PM86.1.1	5122	Matter: Plaintiff: Liens tab. Go to Denials tab > Hit New in Denials window > Lien Denial Data Entry window appears > hit OK > get an error: "INSERT statement conflicted with..."	Fixed	Airenas
PM86.1.1	5128	In Groupware listing do preview - have got an error: 'gryGrpwrMessage: 'Parameter 'ID' not found.	Fixed	Saulius
PM86.1.1	5130	If in Workflow listing select All Personnel have got an error: ' Either BOF or EOF is true, or the current record has been deleted. Requested operation requires a current record.'	Fixed	Saulius
PM86.1.1	5131	In Groupware settings>Assign to Law Type or AssignLaw type or Assign to Document tabs Try to assign all items- have got an error 'Parameter object is improperly defined. Inconsistent or incomplete information was provided.'	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.1.1	5132	Open Document De> Matters tab, try to assign all available matters- have got an errorParameter object is improperly defined. Inconsistent or incomplete information was provided'. Go to Players tab have got another error 'QSCreator: Parameter 'ENTITYIDPARAM' not found	Fixed	Erikas
PM86.1.1	5133	In Dokument DE> Issues Listing check on Select more after from Available Issues screen try to create new - have got an error: 'Query Issue: Field 'DATACREATED' not found.'	Fixed	Audrius
PM86.1.1	5134	Try to create a new timeslip- have got an error: 'Multiple-step operation generated errors. Check each status value.'	Fixed	Audrius
PM86.1.1	5135	Open Document De>Groupware Listing and try to create new item- have got an error 'QueryClients: Parameter 'MATTERIDPARAM' not found.	Fixed	Saulius
PM86.1.1	5138	In Address Book Settings> Template DE fill in Code, Description fields, after fill Last field, go to other field- have got an error: 'QUERYENTITY: Field 'Last_Company' not found.'	Fixed	Saulius
PM86.1.1	5142	Can create document without description.	Fixed	Erikas
PM86.1.1	5145	In entity Listing > entity merge> related Matters or related entities screens try to print- PMWin crashes.	Fixed	Robertas
PM86.1.1	5146	In workflow listing can create any item without description.	Fixed	Saulius
PM86.1.1	5147	In Issues Settings> Issues tab try to create a new item- have got an error:' Query Issue: Field 'DATACREATED' not found.'	Fixed	Audrius
PM86.1.1	5149	In Note settings> Note template tab press on New button - has got access violation error.	Fixed	Audrius
PM86.1.1	5152	In security settings> Descriptions tab cannot create a new item- has got an error: 'No value given for one or more required parameters.' Cannot open item too.	Fixed	Erikas
PM86.1.1	5153	In Site settings>Drive Mappings tab> Drive mappings screen fill only profile Drive name and mapped drive name fields, do not select any site- have got general sql error: 'Cannot insert the value NULL into column 'LOCALSITEID', table 'demo85.dbo.DOCMAP'; column does not allow nulls. INSERT fails. The statement has been terminated.'	Fixed	Erikas
PM86.1.1	5154	In entity listing I can create two or more users with the same code, initials,	Fixed	Robertas

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Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		description. Create a user and Create an entity (client or staff), in code field enter the same code like user. And after can edit this entity and do it user- just in other details click on user checkbox and do save. And all users with the same code can login to PMWIN.		
PM86.1.1	5155	Create a template in which fill last name field. Check on client checkbox. After using this template creates an entity- can create client with code empty code field.	Fixed	Saulius
PM86.1.1	5156	In entity listing check on New phone call (by using right click)- have got access violation error	Fixed	Audrius
PM86.1.1	5159	In Document Assembly settings >Ole Queries tab do new - have got an error: 'The text, ntext, and image datatypes cannot be used in the WHERE, HAVING, or On clause, except with the LIKE or IS NULL predicates.'	Fixed	Ruslan
PM86.1.1	5164	LV bug- AR Details do not bring up correct information- AR details does not bring anything.	Fixed	Audrius
PM86.1.1	5165	In Entity DE> Other Details tab cannot see timekeeper number field even if in Timeslip settings> General tab is selected billing program Legal Vision.	Fixed	Saulius
PM86.1.1	5194	Document DE > Matter Lookup field > Hit faucet filter to see available matters > Matter Number column is empty. System does not display matter number in this listing.	Fixed	Erikas
PM86.1.1	5199	Matter DE > Workflow tab. Create New Task > Assign players to this task. 1) Hit Save > system gives an error: "QuerySelect: Cannot perform this operation on an open dataset." 2) Hit Edit to edit assigned player's data > System gives an error: "QueryAssign: Parameter 'ENTASSIGNID' not found."	Fixed	Saulius
PM86.1.1	5200	Create new matter > fill matter name, file number and matter type > hit Calendar speed button next to DOI field > choose any workflow item > Select Template window appears > choose or do not choose template > get an error: "INSERT statement conflicted with..."	Fixed	Airenas
PM86.1.1	5201	Matter DE (litigation specific screen) > Staff or Clients tab. Hit Assign (assign wizard is disabled) > Address Book window appears > try to assign any entity with any role > System gives an error: "Application uses a value of a wrong type for the current operation."	Fixed	Saulius
PM86.1.1	5202	Printing is not working in these settings: Comments: Address Book settings>Assign role, assign to role tabs> listing screen,	Fixed	Robertas

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Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		Document Settings, Document Settings>Type Assign, assign to type tabs> listing screen, Note Settings> Assign matter notes, assign to matter notes tabs > listing screen, Groupware settings> assign to law type, assign law type, assign to project tabs> listing screen, Issues Settings, Annotation Settings, Security settings, Security settings > all listings, Site settings > Drive mappings tab.		
PM86.1.1	5204	Printing is not working in Matter DE > documents listing.	Fixed	Erikas
PM86.1.1	5206	In Litigation specific Settings print is working, but cannot see print preview- just check on print button and setting is printed.	Fixed	Airenas
PM86.1.1	5214	Matter: Overview: Office Expenses tab. Hit Edit (or New) > Data Entry Expense Disbursement window appears > Hit Allocate to Client > Client Allocation window appears > select first choice "Allocate expense equally among all clients" > get an error: "Floating point division by zero."	Fixed	Airenas
PM86.1.1	5117	Entities are not posted to Legal Vision. If I try to create a new entity have got access violation error.	Fixed	Saulius
PM86.1.1	5221	Matter DE (non litigation specific screen) > cannot select Status.	Fixed	Airenas
PM86.1.1	5223	Workflow listing. Create or open for editing an Appointment or Court Event record > workflow DE opens > hit Location Arrow button > Address Book listing appears > select an entity > system asks: "Would you like to add the entity as a participant". Comments: Say YES > get an error: "QueryAssign: Parameter 'ENTASSIGNID' not found".	Fixed in bug #5199 at 2) point.	Saulius
PM86.1.1	5225	In annotation and auxiliary settings create an item, after cannot delete it.	Fixed	Audrius
PM86.1.1	5231	In Workflow listing> workflow task, critical date, appointment > Players tab click on edit button> have got error: "QueryAssign: Parameter 'ENTASSIGNID' not found."	Fixed	Saulius
PM86.1.1	5236	Float Treeview enabled- when opening a matter- the screen repaints several times - as if it is loading various components until matter info finally opens. It actually gives the impression that it is caught in a loop before opening	Fixed	Airenas
PM86.1.1	5238	Try to connect to PMWin- have an error:' Could not load integration manager'.	Fixed	Vygintas
PM86.1.1	5250	In Security settings >User Settings tab can close window using letter 'C', but can not close window using Ctrl+F4	Denied	Erikas
PM86.1.1	5255	In Document Assembly Settings is not working print by using Ctrl+P.	Fixed	Ruslan

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PM86.1.1	5257	Print using Ctrl+P is not working in all Settings> Listings screens.	Fixed	Saulius
PM86.1.1	5258	Document DE. Try to assign a primary matter: hit Arrow button next to Primary Matter field > Matter Listing window appears > select any matter (by double-click or by hitting Select button) > Matter Listing window closes, but mouse pointer remains active.	Fixed	Erikas
PM86.1.1	5269	Workflow listing > Calendar view. One-month view. Double-click on a day with at least one workflow record > small one-day view window appears > double-click on any workflow record of that day > workflow DE window opens. See Comments. Comments: Go to players tab > hit Edit button on the right bottom of the screen to edit entity's data > Entity DE window opens, workflow DE window closes but workflow one day calendar view window remains in the front of the screen (in front of entity DE window), so you cannot edit entity record. You have to close this window manually.	Fixed	Saulius
PM86.1.1	5271	Issues Settings > Issues tab. Hit New > get an error: "Query Issue: Field 'DATECREATED' not found." Cannot create a new issue anywhere in PM.	Fixed	Audrius
PM86.1.1	5276	Create a new organization, check on client, after go to other details tab - Organization ID field is required, but do close- you can close with empty organization field.	Fixed	Saulius
PM86.1.1	5279	Issue Settings > Assign Law Types tab. Select All Issues (do not select All Law Categories) and try to assign a law type > nothing happens. Cannot assign a law type.	Fixed	Audrius
PM86.1.1	5280	All listings: Grid layout is not saved after user selects "save grid layout", and then logouts/logins PM. Always "general" columns are displayed.	Fixed	Arturas
PM86.1.1	5281	In Litigation settings add 'Print' button.	Fixed	Airenas
PM86.1.1	5319	I press print from icon or from file menu or just using Ctrl+P I get Windows Print Setup window at once, instead of getting Report Title window. Also, the whole window view is printed instead of report. See all your settings.	Fixed	Airenas
PM86.1.1	5320	I press print from icon or from file menu or just using Ctrl+P I get Windows Print Setup window at once, instead of getting Report Title window. Also, the whole window view is printed instead of report. See all your settings.	Fixed	Saulius
PM86.1.1	5321	I press print from icon or from file menu or just using Ctrl+P I get Windows Print	Fixed	Audrius

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		Setup window at once, instead of getting Report Title window. Also, the whole window view is printed instead of report. See all your settings.		
PM86.1.1	5322	I press print from icon or from file menu or just using Ctrl+P I get Windows Print Setup window at once, instead of getting Report Title window. Also, the whole window view is printed instead of report. See all your settings.	Fixed	Ruslan
PM86.1.1	5324	I press print from icon or from file menu or just using Ctrl+P I get Windows Print Setup window at once, instead of getting Report Title window. Also, the whole window view is printed instead of report. See all your settings.	Fixed	Erikas
PM86.1.1	5325	I press print from icon or from file menu or just using Ctrl+P I get Windows Print Setup window at once, instead of getting Report Title window. Also, the whole window view is printed instead of report. See all your settings.	Fixed	Saulius
PM86.1.1	5328	In any setting press on Print>Print to File- has got access violation error. Cannot save to file.	Fixed	Robertas
PM86.1.1	5337	PMWIN has a bug with versions. Versions are recorded into DOCVER table in wrong order. Here is scenario. See Comments Comments: Create Document. The DOCUMENT table has one record. The DOCVER has none. Now create a new version of the document. Now DOCVER has two records: 100 Version 1 101 Original Document If you create third version, then DOCVER will have: 100 Version 1 101 Original Document 102 Version 2 QA: Error in the order of inserting records in DOCVER table - A.V.	Fixed	Erikas
PM86.1.1	5341	Find all instances of "LAW.com" or "PMTI" or similar, and replace with "RealLegal"... and use that spelling and capitalization. Comments: This should be included in the last build of 8.6 delivered to QA on 04/13/2001.	Fixed	Audrius
PM86.1.1	5343	Find all instances of "LAW.com" or "PMTI" or similar, and replace with "RealLegal"... and use that spelling and capitalization. Comments: This should be included in the last build of 8.6 delivered to QA on 04/13/2001.	Fixed	Erikas
PM86.1.1	5344	Find all instances of "LAW.com" or "PMTI" or similar, and replace with "RealLegal"... and use that spelling and capitalization. Comments: This should be included in the last build of 8.6 delivered to QA on 04/13/2001.	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.1.1	5345	In Address Book listing> Query screen are fields ROLEID, ENTITYID, ENTITYTYPEID- remove these fields from query.	Fixed	Saulius
PM86.1.1	5347	Print using Ctrl+P is not working in all settings> Listings screens. Check your code.	Fixed	Airenas
PM86.1.1	5348	Print using Ctrl+P is not working in all settings> Listings screens. Check your code.	Fixed	Erikas
PM86.1.1	5349	Print using Ctrl+P is not working in all settings> Listings screens. Check your code.	Fixed	Audrius
PM86.1.1	5350	Remove field Message id from query in Groupware listing and fields Court id and Thread id from query in Workflow listing.	Fixed	Saulius
PM86.1.1	5355	In System Settings>General tab check on Disable save grid layout, after I can see Save grid layout item in menu > matter De> players, workflow listings and in global address book, workflow listings.	Fixed	Saulius
PM86.1.1	5356	In System Settings>General tab check on Disable save grid layout, after I can see Save grid layout item in menu > matter De> notes listing and in global notes listing.	Fixed	Audrius
PM86.1.1	5357	In System Settings>General tab check on Disable save grid layout, after I can see Save grid layout item in menu > mater listing.	Fixed	Airenas
PM86.1.2	5103	Matter: Overview: Billing > Report/Bill to tab. There is at least one entity selected as a party. Go to Address tab > Description field is blank. Hit 'edit' to edit entity's information > entity DE opens > Primary Address Description field is not empty. You cannot see Address Description anywhere in matter DE litigation specific screens.	Fixed	Ruslan
PM86.1.2	5104	In Document Assembly Settings>Multi-Components tab> Group Members item try save without description. Have4 got general sql error: 'Cannot insert the value NULL into column 'DESCRIPTION', table 'demo85.dbo.COMPCOMB'; column does not allow nulls. INSERT fails. The statement has been terminated.'	Fixed	Ruslan
PM86.1.2	5105	Matter: Plaintiff: Experts tab. Hit Edit to edit existing entity > Expert Data Entry window appears > write non-existing entity name in Expert Name field and go to other tab > Expert Name field is filled with "RECORD NOT FOUND" > hit OK > get an error: "UPDATE statement conflicted with COLUMN FOREIGN KEY constraint 'ASSIGN_ENTITYID_REF'...."	Fixed	Airenas
PM86.1.2	5106	Matter: Plaintiff: Employment tab. If there is no entity assigned as Employer, then hit New in a lower window > Lost Wages Data Entry window appears > Hit OK > get an error.	Fixed	Airenas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.1.2	5107	Matter: Plaintiff: School tab. If there is an entity assigned as a School, hit Edit > School Data Entry window appears > Delete a record from School field > hit OK > get an error	Fixed	Airenas
PM86.1.2	5109	Matter: Plaintiff: Cars tab. Hit New > Vehicle Data Entry window appears. Enter non-existing entity name in Registered Owner field and go to other tab > get an error: "qRegisteredOwner: field 'ENTITYID' not found." The same with Title Owner and Operator fields.	Fixed	Arturas
PM86.1.2	5116	Matter: Plaintiff: Other Entities tab. Hit New > Other Entities Data Entry window appears > enter anything in Entity Name field and go to other tab > this field is filled with "RECORD NOT FOUND". Select Role and Side > hit OK > get an error.	Fixed	Airenas
PM86.1.2	5117	Matter: Plaintiff: Other Entities tab. Hit New > Other Entities Data Entry window appears > select Side, then select entity for Entity Name field and select Role > OK button is not disabled. I must reselect Side to enable it.	Fixed	Airenas
PM86.1.2	5123	Matter: Defendant: Experts tab. Hit Edit to edit an expert record > Expert Data Entry window appears > enter non-existing record in Expert Name field > go to other tab > Expert Name field is filled with "RECORD NOT FOUND" > hit OK > get an error: "UPDATE statement conflicted with..."	Fixed	Airenas
PM86.1.2	5139	Open Groupware listing, filter by all senders- have got an error: 'Either BOF or EOF is true, or the current record has been deleted. Requested operation requires a current record.'	Fixed	Airenas
PM86.1.2	5144	In Document Assembly Settings>Multi-Components tab> Group Members item try save without description. Have4 got general sql error: 'Cannot insert the value NULL into column 'DESCRIPTION', table 'demo85.dbo.COMPCOMB'; column does not allow nulls. INSERT fails. The statement has been terminated.'	Fixed	Ruslanas
PM86.1.3	5182	Matter > Overview > Caption. Double Click on empty window > get a message: "Invalid class string."	Fixed	Airenas
PM86.1.3	5212	Matter: Overview: Negotiations. Hit New > Negotiations - Log data entry window appears. OK button is enabled. Select entity as Adjuster/Attorney and hit Ok (nothing is selected in Staff field) > System closes this window and places System Administrator (if you are logged in PMWIN as System Administrator) as a staff for this record. Now hit Edit to edit just entered negotiations record > in Negotiations Log data entry window Staff field is empty.	Fixed	Airenas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.1.3	5213	Matter: Overview: Negotiations tab. If there is no entity assigned here, try to write anything in Comments window and after that try to go to Special Damages tab > get a message: "QuerySearchPMComments: Dataset not in edit or insert mode."	Fixed	Airenas
PM86.1.2	5275	Workflow listing > calendar view > one month view. Double-click on any day with at least one workflow record > one-day view window appears. Open any workflow record of that day and change it's description > close workflow DE. Comments: One-day calendar view window is not refreshed.	Fixed	Saulius
PM86.1.2	5318	In Entity De>Other Details tab check on Bar number, create a new item - after that you cannot delete it.	Fixed	Saulius
PM86.1.2	5339	Find all instances of "LAW.com" or "PMTI" or similar, and replace with "RealLegal"... and use that spelling and capitalization. Comments: This should be included in the last build of 8.6 delivered to QA on 04/13/2001. Response: I don't have any law.com or PMTI in the document assembly.	Denied	Ruslanas
PM86.1.2	5348	Print using Ctrl+P is not working in all settings> Listings screens. Check your code.	Fixed	Erikas
PM86.1.2	5364	In System Settings>General tab check on Disable save grid layout, after I can see Save grid layout item in menu > Settings> Listings.	Fixed	Erikas
PM86.1.2	5380	When open document listing see all items created by all authors - must see all items created by the user which logins to PMWin.	Fixed	Erikas
PM86.1.2	5378	In System Settings > Auto Numbering Settings screen >Client/billable tab check on Activate Client/billable auto numbering. Create an entity. Check on Client and Billable, in Other Details tab code field can write any value. But if check on next, have got an error: 'Formal parameter '@ID' was defined as OUTPUT but the actual parameter not declared OUTPUT'.	Fixed	Airenas
PM86.1.2	5385	In System Settings > Auto Numbering Settings screen >Client/billable tab check on Activate Client/billable auto numbering. Create an entity. Check on Client and Billable, in Other Details tab code field can write any value. And after save this entity.	Fixed	Saulius
PM86.1.2	5349	Print using Ctrl+P is not working in all settings> Listings screens. Check your code.	Fixed	Audrius
PM86.1.2	5366	In System Settings>General tab check on Disable save grid layout, after I can see Save grid layout item in menu > Settings> Listings.	Fixed	Audrius
PM86.1.3	5125	In Document listing press button Copy- have got an error:' Invalid column name'222.	Fixed	Erikas

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Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		doc'.		
PM86.1.3	5171	Matter > Overview > Source. For the existing source enter different Matter Intake person (By field in Matter Intake area). Then hit Edit > in Source Data Entry window Matter Intake person is not refreshed.	Fixed	Airenas
PM86.1.3	5216	Create a matter, PMWin do not post it to Legal vision. Can not get client matter number, see that matter in LV.	Fixed	Vygintas
PM86.1.3	5235	Tree View - All Listings is Horribly slow - even with limited records	Fixed	Linas
PM86.1.3	5282	Litigation Specific settings Assign Matter Group tab. There is a button "Open" in a bottom of a right window (Selected Matter Group). Also there is a column "Matter #" on the same window. Remove both - the button and the column.	Fixed	Airenas
PM86.1.3	5328	In any setting press on Print>Save to File , open save report screen and just do cancel (nothing change), after press print to file- have got access violation error.	Fixed	Robertas
PM86.1.3	5329	In Matter listing retrieve query in which are selected fields- Client City and Client State- have got an error ' The column prefix 'ADDRESS' does not match with a table name or alias name used in query'.	Fixed	Erikas
PM86.1.3	5351	In workflow listing>Query select fields Plan, Priority and apply query. And if after want to open query have got an error: 'Cannot perform this operation on a closed dataset.' Must reopen listing window. Comments: Lookups of these fields are empty.	Fixed	Saulius
PM86.1.3	5353	Document Settings Templates tab. Hit New > choose Outgoing (or Incoming) > Document template DE window opens > fill only Template Code and Template Description fields > Save Template. Now try to open that just created template > get an error.	Fixed	Erikas
PM86.1.3	5358	In System Settings > Auto Numbering Settings screen >Client/billable tab check on Activate Client/billable auto numbering. Create an entity. Check on Client and Billable, in Other Details tab code field can write any value. And after save this entity.	Fixed	Robertas
PM86.1.3	5361	In Matter De> Annotation tab is not working query- can not open query screen at all.	Fixed	Audrius
PM86.1.3	5372	Address book Settings> Assign to Role tab, try to assign all Law Types> have got an error. Same in Workflow Settings> Assign to Activity tab. See Comments: Comments: Workflow Settings> Assign Activity tab. Select All Law Type (do not select ALL Law Category), try to assign all Activity Template> have got an error:	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		'Violation of PRIMARY KEY constraint...'		
PM86.1.3	5382	Timeslip Settings>Transaction list tab, open any record. Go in Assign Sub-Transaction tab or Assign Client> have got an error: 'Access violation at address 00499B3F...'. Comments: Timeslip Settings>Template tab> New> Template Code and Template Description enter any values, hit Save, have got an error: 'QuerySlip: Field 'TIMESLIPID' not found.	Fixed	Audrius
PM86.1.3	5391	When records in ADDRESS or ENTITY tables are being inserted, fields CREATORID and DATECREATED must be filled in. CREATORID must be filled in with user ID that is logged in to PMWin. DATECREATED must be filled in with current datetime (getdate()) Comments: Script to alter ADDRESS table was created. It exist in VSS:\$/PMWin 8.6/SQL/MSSQL/PENDING/darius_1.sql Table ADDRESS was modified. Columns CREATORID, REVISORID, DATECREATED, DATEREVISED were added. INDEXES ADDRESS_DATECREATED and ADDRESS_DATEREVISED were added to improve data searching. This update is required to enable Integration part synchronize data with other systems attached. Columns DATECREATED and CREATORID were updated.	Fixed	Saulius
PM86.1.3	5393	When ADDRESS or ENTITY tables are being updated modify fields REVISORID, DATEREVISED and set them with current user that is making changes and current date when change is happening. Comments: Related to 5391	Fixed	Saulius
PM86.1.3	5398	Create a public query in Note Global Listing. Match this query be seen only in Global Listing. After retrieving query list, cannot see this query definition. Comments: Inserting a record in HOTFILTR table instead of TYPE being equal to 5 (global Note Listing), program populate TYPE = 1 (global Entities Listing).	Fixed	Audrius
PM86.1.3	5401	In workflow listing>Create any new item, using template with listed actions. In workflow item DE >Players tab assign some players and after check on address edit button: have got a message: 'Do you want to review Linked Activity records?' Comments: If press yes- has got access violation error- PMWin crashes.	Fixed	Saulius
PM86.1.3	5407	Matter: Overview: General tab. Staff or Clients window. Hit Assign (Entity Assignment Wizard is disabled) > Address book window appears. Select any Role and hit Assign All > System asks: Comments: "Are you sure you want to assign all entities with the Role you have	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		selected?" > say YES > get an error: "Application uses value of the wrong type for the current operation."		
PM86.1.3	5411	Workflow Settings: Assign To Activity tab. Here select All Law Categories and hit Assign All [>>] button > get an error: "Parameter object is improperly defined. Inconsistent or incomplete information was provided".	Fixed	Saulius
PM86.1.3	5413	Workflow listing. Try to open any item > get an error: "QueryRule: Field 'MATPLANID' not found".	Fixed	Saulius
PM86.1.3	5422	If in outlook current view will be by sender and after one sender all items drag and drop to PMWin- have got access violation error.	Fixed	Linas
PM86.1.4	5192	Litigation Specific Settings > Specials Assignment tab. Cannot assign/unassign SubSpecials by mouse double-click.	Fixed	Airenas
PM86.1.4	5215	Matter: Overview: Companion Matters tab. Hit New > Data Entry window appears > enter non existing matter name in Matter Name field > go to other tab > Matter Name field is filled with "RECORD NOT FOUND." > hit OK > get an error: "Cannot insert the value NULL into column 'RELATEDMATTERID', table...". Now, if you will update an existing record in the same way (open this record and enter non existing matter name in Matter Name field > hit OK > System will say: "Non-null able column cannot be updated to Null."	Fixed	Airenas
PM86.1.4	5262	In Label settings enter translation words: matter, all, statuses- in matter listing > on matter dropdown box these words are not translated.	Fixed	Airenas
PM86.1.4	5274	Matter DE > Issues tab. Hit Open > Issue DE opens. Go to Related Annotations tab > get an error: "Parameter object is improperly defined. Inconsistent or incomplete information was provided."	Fixed	Audrius
PM86.1.4	5326	In Note DE Author field I cannot select an author from faucet listing. Also - if I type entity code, system selects this entity as an author, but full entity name is not displayed in the field on the right.	Fixed	Audrius
PM86.1.4	5327	Entity DE Related Tree tab. Highlight Workflow branch and hit New > Assign window appears > Hit New > Select "task" > select any template > workflow DE opens > go to Players tab > hit Edit to edit entity's record > entity DE opens, but Assign window remains open also.	Fixed	Saulius
PM86.1.4	5363	Matter: Plaintiff: Special Damages tab. New > Special Damages Data Entry window appears. Select Provider Name (leave Category empty) > OK > Special Damages	Fixed	Airenas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		Data Entry window closes. You cannot edit this record, because Edit and Delete buttons are disabled		
PM86.1.4	5371	Matter Settings> Assign to Status tab, try to assign all Low Types> have got an error: 'Parameter object is improperly defined. Inconsistent or incomplete information was provided.'	Fixed	Airenas
PM86.1.4	5373	Note Settings> Assign Matter Notes tab. Try to assign all Note Templates for Matter> have got an error: 'Parameter object is improperly defined. Inconsistent or incomplete information was provided.' See Comments: Comments: Same Annotation Settings>Assign Low type tab, when try to assign all Law Types. Annotation Settings> Assign to Low type tab, when try to assign all Available Annotations. Note Settings> Assign To Matter Notes tab. Select All Law Category (do not select All Matter Note Template)> have got an error: 'An ORDER BY clause is invalid in views..'	Fixed	Audrius
PM86.1.4	5382	Timeslip Settings>Transaction list tab, open any record. Go in Assign Sub-Transaction tab or Assign Client> have got an error: 'Access violation at address 00499B3F...'. Comments: Timeslip Settings>Template tab> New> Template Code and Template Description enter any values, hit Save, have got an error: 'QuerySlip: Field 'TIMESLIPID' not found.' QA: The first part (not in Comments) is bug	Fixed	Audrius
PM86.1.4	5386	Address book Settings> Assign Role tab and Assign to Role tab, can not open listing screen. Have got an error: 'Incorrect syntax near the keyword 'LEFT''.	Fixed	Erikas
PM86.1.4	5400	I create a new matter (standard) fill all fields and after try go to billing tab- Event date screen is opening, do ok and after do close- bath operation is broken- after I try go to billing tab have got an error: Comments: 'QueryMatter: Dataset not in edit or insert mode'. If batch projects are enabled - they start automatically when creating a new matter-	Fixed	Airenas
PM86.1.4	5405	In Entity De >Other Details tab>assign/Copy Parent Address screen >Description field cannot filter by entered letter.	Fixed	Saulius
PM86.1.4	5406	Workflow Settings - Activity Template - Linked Actions - Workflow linked action. See comments. Comments: Setting "Action date moves if parent activity date moves" should not be allowed to check if "Prompt User to enter the activity date" is selected in Assign	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		Action window, when adding a workflow linked action to a workflow activity template.		
PM86.1.4	5412	In Entity DE>Related tree tab or in Matter DE >Tree View tab >check on Options. In Sorting and Grouping screen entities fields>select visible columns screen assign all columns, save grid layout. Have got access violation error. Comments: And after cannot assign any new entity item.	Fixed	Linas
PM86.1.4	5415	In Groupware settings>Assign to Document tab >Workflow document assignment listing screen open filter screen and try to filter by role- have got access violation error.	Fixed	Erikas
PM86.1.4	5416	Litigation Specific Settings: Specials Assignment tab. Right-click the faucet filter of the Specials field and select on Filter Field. Here are 2 available fields: DESCRIPTION and SPECIALSID. Remove SPECIALSID.	Fixed	Airenas
PM86.1.4	5419	In Groupware listing> Rule listing is not working search by letter, number symbol cannot enter at all in the search.	Fixed	Saulius
PM86.1.4	5426	In matter DE >Document tab create a new item- after can not see this item in this tab.	Fixed	Erikas
PM86.1.4	5433	In workflow listing retrieve a filter. After try it to save as. Enter filter name , press on OK- have got an error: 'Dataset not in edit or insert mode.'	Fixed	Erikas
PM86.1.4	5434	In User Preferences>Listing tab >Note listing select any default filter. After try to open Note listing- have got an error: 'FilterQueryPMNotes: 'Field 'NOTENOTEID' not found.' Comments: The same is in matter DE form>note listing	Fixed	Audrius
PM86.1.4	5435	Workflow settings Plan tab. Create a new plan. Then highlight this plan and hit Open > plan tree window appears. Insert an activity to the plan which event date must be entered by the user. Save this plan. Comments: Now go to Matter DE Workflow tab Plan window. Right-click mouse and select Start Plan > Plans window appears. Select this just created plan > Activity Date window appears. System asks to enter the Event Date for the activity. Bug is that Date field has no mask.	Fixed	Saulius
PM86.1.4	5446	In Document settings >Application tab try to create two the same application items- have got an error: 'Cannot insert duplicate key row in object 'DOCFORM' with unique index 'DOCFORM_CODE_UNIQUE'.	Fixed	Erikas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.1.4	5447	Document Settings - Template. Comments: I create a new template (Outgoing or Incoming). Enter Template Code, Template Description, and Click Save. I get information message "PPGUID_DocProfileInsertUpdate not published". Then I open the new template, click Save. Then I open it again - I get error message "Invalid variant type conversion". Click Save - nothing happens, the template is not saved and the form is not closed.	Fixed	Erikas
PM86.1.4	5450	In workflow listing>Create any new item using template with linked actions. In workflow item DE >Players tab assign some players and after check on address edit button: entity De window is opening behind workflow item window. Comments: And is opening Assign Players screen.	Fixed	Saulius
PM86.1.4	5451	Matter: Plaintiff: Liens tab. Go to Denials tab > Hit New in Denials window > Lien Denial Data Entry window appears > double-click hit faucet filter next to Lien Holder field > get an error: "qLienHolder: Field 'ENTITYID' not found."	Fixed	Airenas
PM86.1.4	5456	Revise Module ASSIGN.PAS, procedure GetFilerSQL and make sure that correct settings for TEntHotFilterSettings and TWkfNHotFilterSettings being used.	Reviewed, no fix needed	Saulius
PM86.1.4	5460	Matter: Overview: Negotiations: Special Damages tab. Hit New > Special Damages Data Entry window appears. Enter anything in Provider Name field and go to other tab by hitting [TAB] button > Address Book window appears. Comments: Assign any entity with any role > Address Book window closes > Special Damages Data Entry window Provider Name field is filled with RECORD NOT FOUND > choose Specials Category and Specials Type > Ok. In Special Damages tab Provider Name you will see the entity that was assigned from Address Book listing. So system incorrectly fills Provider Name field in Special Damages Data Entry window.	Fixed	Airenas
PM86.1.4	5463	Matter: Overview: Investigation: Police tab. Hit New > Police Data Entry window appears. Enter anything in Police Precinct field and go to other tab > Police Precinct field is filled with RECORD NOT FOUND. Hit Ok > get an error: Comments: "Insert statement conflicted with COLUMN FOREIGN KEY CONSTRAINT 'LW_POLICEAGENCY_ASSIGNID_REF'. The conflict occurred in database 'PMWIN86', table 'ASSIGN', column 'ASSIGNID'."	Fixed	Airenas
PM86.1.4	5464	Matter: Overview: Investigation: Investigation Agency tab. Hit New > Investigation Data Entry window appears. Enter anything in Name field and go to other tab > Name field is filled with RECORD NOT FOUND. Select Role and hit OK > get an	Fixed	Airenas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		error: Comments: "INSERT statement conflicted with COLUMN FOREIGN KEY constraint 'LW_POLICEAGENCY_ASSIGNID_REF'. The conflict occurred in database 'PMWIN86', table 'ASSIGN', column 'ASSIGNID'. Same problem in Matter: Overview: Investigation: Witnesses tab.		
PM86.1.4	5466	Try to save matter filter in Matter listing>Matter filter screen- have got an error: 'Dataset not in edit or insert mode'	Fixed	Erikas
PM86.1.4	5468	Matter: Overview: Office Expenses tab. Select check box "Show Expense Allocation for Client". Select a Client for this field > system displays all the Expense Allocations in a list below for this client. Comments: Click on any record in this list below > Show Expense Allocation for Client field is filled with RECORD NOT FOUND. This is wrong, because Client is the same for all the records in that list.	Fixed	Airenas
PM86.1.4	5474	In Matter De>Security tab try to assign all items - have got an error: 'Parameter object is improperly defined. Inconsistent or incomplete information was provided.'	Fixed	Airenas
PM86.1.4	5481	Document listing> New> Choice Profile Only, has got an error: 'Access violation...'	Fixed	Erikas
PM86.2.1	4715	Matter DE "Status Date" field does not contain date entering mask.	Fixed	Airenas
PM86.2.1	4735	By pressing right mouse button I get small list of available columns. Choose "More Columns" > you can add NAMEENTITY, SOURCECATEGORY and SOURCEENTITYID. These columns should be set as "can not be visible". Comments: The same situation is also in the following Matter: Overview tabs: Billing>Billing#, Court, Negotiations: Negotiation Log, Negotiations: Medical/Expert Records, Office Expenses, Companion Matters and Caption.	Fixed	Airenas
PM86.2.1	4745	Treatments tab. If there is a record in this list, I cannot edit it. After pressing Edit button Treatment Data Entry window appears. OK button is disabled in it.	Fixed	Airenas
PM86.2.1	4990	In standard matter general tab, client or billable No. field change item. And after go to Billing tab >Hourly billing rate screen>Matter field- client or billable No. is still old.	Fixed	Airenas
PM86.2.1	5011	Document Listing > New > Use Document Template > System does not fill in value for Document Category & Type in document profile. QA: CNR	Denied	Erikas
PM86.2.1	5070	Add support for Corel WP2000 Response: If old WP code works after minor modification, then 1 day, if it does not	Fixed	Erikas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		then 2-3 days.		
PM86.2.1	5150	In timeslip listing> Archive do set reimbursed- have got an error:'Error ocured while setting timeslip to reimburse.'	Fixed	Audrius
PM86.2.1	5207	Matter: Overview. Staff tab. Hit assign to assign an entity as a staff > address book listing appears > hit Assign New > entity DE opens > fill the required fields > Finish. Entity DE closes and also Address Book listing closes. This is wrong, because I have not assigned an entity as a staff yet. This problem is everywhere where I can select a new entity to assign to a matter. Response: The command you select is ASSIGN new, not CREATE new. So system assigns this entity to a matter with the role you select in Entity DE form.	Denied	Saulius
PM86.2.1	5359	In Document De> Players tab assign some entities- have got an error:'Either BOF or EOF is True, or the current record has been deleted. Requested operation requires a current record.' Comments: The same problem is in matter De >document listing.	Fixed	Erikas
PM86.2.1	5467	Matter DE (this matter has related document annotation)> Annotation tab> in Index field select Document Annotation> View Document> document is not open.	Fixed	Audrius
PM86.2.1	5479	Matter:Plaintiff:Experts tab. Hit New > Expert Data Entry window appears. Enter anything in Expert Name field and go to other tab > Expert Name field is filled with RECORD NOT FOUND. Now select Role > hit arrow button next to Expert Name field > Comments: Address Book listing appears. Select any entity from this listing > Address Book listing closes > entity's name is displayed in Expert Name field of Exper Data Entry form. This is ok. Hit Ok > get an error: "INSERT statement conflicted with COLUMN FOREIGN KEY constraint 'LW"WITMASTER_ENTITYID_REF'. The conflict occurred in database 'PMWIN86', table 'ENTITIES', column 'ENTITYID'."	Fixed	Airenas
PM86.2.1	5483	Hit New > School Data Entry window appears. Select record for School field > select Role > in field Total Period Absent enters "a" > hit Ok > get an error: "'a' is not a valid integer value for the field 'TOTALDAYSABSENT'." Comments: The error message must be modified.	Fixed	Airenas
PM86.2.1	5484	Matter: Plaintiff: School tab. Hit New > School Data Entry window appears. Enter School, choose role. Enter '10' in the field Total Period Absent and choose "weeks" next to this field > Ok. School Data Entry window closes.	Fixed	Airenas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		Comments: Column "Days Absent" displays "10". This is incorrect, because in School Data Entry form the selection was "10 weeks", not "10 days".		
PM86.2.1	5486	Matter: Plaintiff: Cats tab. Hit New > Vehicle Data Entry window appears. Fill Make, Model and Vehicle Role fields. Now hit arrow button next to Registered Owner field > Address Book window appears. Comments: Select radio button Global Address Book > highlight an entity which is not yet assigned to this matter > hit Select > Address Book assignment window appears. Highlight other entity not yet assigned to the matter > hit Assign > system asks if you really want to assign this entity with the selected role > choose Yes > you are back in Vehicle Data Entry window. The entity displayed in Registered Owner field is not the one previously assigned to the matter. Hit Ok > now the entity name displayed in Registration Owner column is correct.	Fixed	Airenas
PM86.2.1	5517	Matter DE> Security tab> Name column> filter in Grid column does not work.	Fixed	Airenas
PM86.2.1	5518	Address Book listing> On Mailing list column> filter in Grid column doesn't work. Same Entity DE> Contacts tab> Name column. Entity DE> Contacts tab> Address column> try filter in Grid column, have got an error 'Invalid column name...'. See Comments: Comments: Matter DE> Players tab> Party column, have got an error 'Syntax error...!'.	Fixed	Saulius
PM86.2.1	5530	Groupware Settings> Groupware Template tab> To column and Public column> filter in Grid column does not work. Same Groupware Settings> Batch Project tab> Type column.	Fixed	Saulius
PM86.2.1	5533	Workflow Settings> Activity Templates tab> Open item> Activity Players tab> Responsible, Notify Only, Assigned By column> filter in Grid column does not work. Workflow Settings> Action tab> check Groupware> Priority and Attachment column> try filter> have got an error 'Invalid column name...'	Fixed	Saulius
PM86.2.1	5541	Matter: Overview: Court. Hit New > Court Data Entry window appears > fill Court/Arbitration field, select Role and enter not existing name in Judge field and go to another tab > Judge field is filled with "RECORD NOT FOUND" > select Role > Ok > Comments: Get an error: "Invalid variant operation".	Fixed	Airenas
PM86.2.1	5546	Groupware Settings> Groupware Template tab> Template Name, Type, Subject	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		columns> Filter in Grid columns is working incorrectly. Same Groupware Settings> Assign to Law Type tab and Assign Law Type tab; Groupware Settings> Batch Project tab> Description column; Groupware Settings> Assign to Project tab.		
PM86.2.1	5560	Matter: Plaintiff: Award/Payment tab. Cannot delete any record from Defendant Share window, because hit Delete > system asks: "are you sure you want to delete current record" > Yes > get an error: "qPlainRecord: Field 'PARTYTYPE' not found".	Fixed	Airenas
PM86.2.1	5562	Matter:Plaintiff:Award/Payment tab. Double-click on Paid column header > get an error: "Column name 'LWP.PAID' is invalid in the ORDER BY clause because it is not contained in either an aggregate function or the GROUP BY clause". Comments: Double-click Outstanding column > get another message: "Invalid column name 'OUTSTANDING'."	Fixed	Airenas
PM86.2.1	5563	Matter> Overview> Negotiations> Policies tab> try to enter anything in Comments (in Party Name window isn't any record)> go to other tab> have got an error 'QuerySearchPMComments...' Comments: Same Matter> Overview> Investigation> Witnesses	Fixed	Airenas
PM86.2.1	5567	Administration > Document Settings > Application. Open any existing record and click OK. Error: "Duplicate Application Code".	Fixed	Erikas
PM86.2.1	5568	Security Settings - Define Security tab. Make that all the available security functions should be listed in the grids regardless the Max Rows on Listing setting, and should be all assigned/unassigned by using Assign/Un-assign All.	Fixed	Erikas
PM86.2.1	5571	In Security settings>Web entities tab create two the same items- have got an error: 'Violation of primary key...'	Fixed	Erikas
PM86.2.1	5573	In Standard Matter DE>Billing tab>Select Visible columns unassigned Rate field- have got an error: 'FilterQueryPMRates: 'Field 'RATE' not found.'	Fixed	Airenas
PM86.3.1	4697	Number of records displayed on Calendar exceeds the number of records specified in System Settings. Comments: we would be wise to add a message to inform user of this QA: Done for Groupware and Workflow Calendars.	Fixed	Saulius
PM86.3.1	4757	Workflow listing filter Comments: 1. When I specify From and To dates into Scheduled fields, upper bound is not filtered. 2. Filtering does not work when I specify values in "In last days" combo boxes in both Completed and Scheduled field groups.	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.3.1	4762	Workflow listing quick filters Past Within and Upcoming Within does not work (listing toolbar, filter window, pop-up menu). Comments: When in HotFilter are unchecked 'Sheduled' - Past Within and Upcoming Within should not work. Response: It is the same bug as 4757.	Denied	Saulius
PM86.3.1	4788	Assign To Matter Notes tab. In Law Types and Assigned Law Types windows there are two columns - Law Type ID and Description. There must be only one. Remove column Law Type ID.	Fixed	Audrius
PM86.3.1	4819	Default Notes for Matters are not being stamped with Datecreated or creator id. DateCreated - Mattercreatedate, Creatorid - SA	Fixed	Airenas
PM86.3.1	4832	Edits to entity record are inconsistent: See Comments Comments: Entity has primary address (not Parent) enter Parent field select parent - Tab- Primary address is immediately removed from primary tab. Selecting cancel in the asign/copy window has no effect- previous primary address is removed as primary	Fixed	Saulius
PM86.3.1	4945	Matter Saga DE - Overview Tab - Source branch: Comments: I am allowed to enter data into Details, Related, and Address Tabs, when there is no any entity entered into the entities table. After that, when I press New, enter information in Source Data Entry window, and press OK - I get SQL errors, also sometimes PMWin hangs at all. Response: 90% of form in litigation must be reviewed	Fixed	Airenas
PM86.3.1	5002	Create a new issue in Issue Settings> Issue tab, after can not delete this item. Response: CNR on PM version 8.6.2.1	Denied, CNR	Audrius
PM86.3.1	5032	Open Matter DE> Overview> No Fault Submission & Denials Layout tab>Select Visible Columns screen unassign Provider field -have got general sql error 'The column prefix ASS does not match with a table name or alias name used in the query'.	Fixed	Airenas
PM86.3.1	5062	Add the following fields to Entity Form-Other Details: Timekeeper Number, Timekeeper Level. Make visible only when User=T Comments: Vyga will have the Specifics for the DB Fileds. Also make available as visible columns in Entity Listing	Fixed	Saulius
PM86.3.1	5074	Add Support for Max Records system setting on Calendar view for Groupware Calendar	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		Comments: Done for Groupware and Workflow Calendars.		
PM86.3.1	5075	Add Support for Max Records system setting on Calendar view for Timeslip Calendar	Fixed	Audrius
PM86.3.1	5108	Matter: Plaintiff: School tab. There is an entity assigned as a School. Cannot write anything in Special Activities field.	Fixed	Airenas
PM86.3.1	5143	Open any note item, delete author field, go to Relate to matters tab, after return to Note tab and select any author and do save-have got an error: 'You must specify Author before leaving this screen.' Response: CNR	Denied, CNR	Audrius
PM86.3.1	5398	Create a public query in Note Global Listing. Match this query be seen only in Global Listing. After retrieving query list, cannot see this query definition. Comments: Inserting a record in HOTFILTER table instead of TYPE being equal to 5 (global Note Listing), program populate TYPE = 1 (global Entities Listing). QA: This is working, but first time retrieving this query have got a message: 'Corrupted Query'. (Just create query, after save it, close listing , open and retrieve this query) D.C.	Fixed	Audrius
PM86.3.1	5455	Revise Module ASSIGN.PAS, procedure GetFilerSQL and make sure that correct settings being used for TTimHotFilterSettings and TNotHotFilterSettings	Fixed	Audrius
PM86.3.1	5461	Matter:Overview:Negotiations:Special Damages tab. If there is at least one record assigned here you cannot enter anything in Comments window. Same in Matter:Plaintiff:Special Damages tab.	Fixed	Airenas
PM86.3.1	5484	Matter:Plaintiff:School tab. Hit New > School Data Entry window appears. Enter School, choose role. Enter '10' in the field Total Period Absent and choose "weeks" next to this field > Ok. Comments: School Data Entry window closes. Column "Days Absent" displays "10". This is incorrect, because in School Data Entry form the selection was "10 weeks", not "10 days". QA: Now after hitting OK get an error: "Violation of PRIMARY KEY constraint 'PK_LW_SCHOOL_OC50D423'. Cannot insert duplicate key in object LW_SHOOL". Tested on PM version 8.6.2.1	Fixed	Airenas
PM86.3.1	5559	Matter:Plaintiff:Insurance tab. Hit New > Insurance Data Entry window appears. Select Insurance Carrier, choose Role. Now several times click on Add Additional	Fixed	Airenas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		Coverage > Ok > Comments: system asks if you want to relate this insurance carrier to other parties in the matter > say No. You are back in Matter:Plaintiff:Insurance screen. Now hit Delete > system asks "Are you sure you want to delete current record" > Yes > window "Select Type of record to delete" appears > choose Insurance Company and hit Ok > system does not delete insurance carrier record. It deletes only Coverage record.		
PM86.3.1	5561	Note Settings> Assign To Matter Notes tab> try to assign all Law Types (>>), have got an error 'Parameter object is improperly...'	Fixed	Audrius
PM86.3.1	5565	Open for ex. Address book settings>any Assign tab >Listing and hit on Print to>Preview after hit on report. Open another Assign tab>listing in any settings and do the same- have access violation and other errors.	Fixed	Robertas
PM86.3.1	5583	Workflow Record > DE Form.. System puts the INITIALS of the Person responsible for the record under the responsible field. In our example lets say the INITIAL is JS for John Smith. After a record is saved. Go back to Entities.> Edit the Entity record of John Smith and change the INITIAL in the entity record from JS to X.. > Go back to workflow and open the record where John Smith is the responsible. System did not change the INITIALS on the record from JS to X.	Fixed	Saulius
PM86.3.1	5587	In Matter de>Plaintiff>Insurance tab hit on New and go to the Listing tab- try to delete- have got an error:' Qcarrier: 'Field 'ENTITYID' not found'.	Fixed	Airenas
PM86.3.1	5590	In Matter DE >workflow tab try to assign plan item- pmwin crashes. Comments: IF YOU CREATING PLAN WITH 1000 RECORDS THEN WAIT WHILE THEY UPLOADS. I add crHourGlass cursor when waiting for upload. (S.K.)	Denied	Saulius
PM86.3.1	5597	Since Workflow responsible now displays WP initials instead of Code, any changes to WP initials are not reflected in workflow items	Fixed	Saulius
PM86.3.1	5598	Matter:Plaintiff:Insurance. Hit New > Insurance DE window opens. Enter anything in Adjuster field and go to other tab > get an error: "Parameter object is improperly defined. Inconsisten or incomplete information was provided."	Fixed	Airenas
PM86.3.1	5614	Timeslip Calendar. Double-click any day > get one-day calendar view window. Double-click any record in this window > get an error: "Access violation at address 007A5ACC in module 'PMWIN.exe'. Read of address 00000150."	Fixed	Audrius
PM86.3.1	5624	Matter:Workflow listing Plan tab. Open any record that has one linked action >	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		workflow DE window opens > go to Linked Actions tab > highlight that Linked Action and hit Delete > system deletes linked action. Comments: Hit Execute & Mark Completed > system comes with the following error: "Access violation error at address 0079C9FD in module 'PMWIN.exe'. Read of address 0000000C." QA: System does not refresh Linked Actions window.		
PM86.3.1	5628	User without Open Workflow Rights can open WF from the Calendar, and Edit	Fixed	Saulius
PM86.4.1	4533	Entity DE Form > Other Detail tab is field Timekeeper Level. In pmwin 8.0 Timekeeper Level can be added through Timeslip settings>Level tab, but in pmwin 8.1 Timekeeper level i can not add. Create Timekeeper Level tab in Timeslips settings.	Fixed	Audrius
PM86.4.1	4377	Enlarge Document Component Design Screen- Entity Role and Aux Radio Buttons are Cut off	Document Assembly Design	Ruslan
PM86.4.1	4818	Filter Tree- Selecting top line Item of "Filters" actually acts as Clear filter or No filter- which is the item immediately below. QA: Appropriate bugs added to the needed listings (D.V.) Response: For implementation of filter tree is responsible this person, who makes listing. In document listing it's ok.	Denied	Airenas
PM86.4.1	4985	Document Listing > If Document Path has a space between 2 words in a directory, and document is a WordPerfect document, System cannot open the document.	Fixed	Erikas
PM86.4.1	5095	In System Settings select mailing system- groupwise. After open Pmwin and check on phone icon- have got general sql error 'The column prefix 'Entities' does not match with a table name or alias name used in the query.' Comments: Needs to fix WHERE part in GWphon.pas unit.	Fixed	Saulius
PM86.4.1	5109	Matter:Plaintiff:Cars tab. Hit New > Vehicle Data Entry window appears. Enter non-existing entity name in Registered Owner field and go to other tab > get an error: "qRegisteredOwner: field 'ENTITYID' not found." The same with Title Owner and Operator fields. QA: PM Component bug. Reassigned to Arturas on 04/12/2001	Fixed	Arturas
PM86.4.1	5161	In Groupware listing> Role Listing> Project tab execute project, after go to Rules tab- have got an error:'QueryMatterRule: Dataset not in edit or insert mode.' Response: Error message removed.	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.4.1	5330	In Workflow listing retrieve query in which is selected field Jurisdiction. Have got general sql error ' Invalid column name 'JURISDICTIONID'.	Fixed	Saulius
PM86.4.1	5331	In timeslip listing retrieve query in which are selected fields Export Status and Status. These fields lookups are empty. Have got an error 'List index out of bounds (-1).'	Fixed	Erikas
PM86.4.1	5449	Document DE - Issues Listing printing. Issues listing print report is empty - only report name is displayed. The same with printing to file. Comments: The fastest way to fix bug below, would be implement New Grid in that Issue Listing (would be for Audrius) I can not estimate how long it would take for me to get familiarized well enough with Robertas' report engine, locate the bug and fix the bug. Up to a week I would say.	Fixed	Audrius
PM86.4.1	5452	Revise Module ASSIGN.PAS, procedure GetFilerSQL and set TMatHotFilterSettings and TWkfHotFilterSettings settings correctly in order for filtering to work.	Fixed	Airenas
PM86.4.1	5454	Revise Module ASSIGN.PAS, procedure GetFilerSQL and make sure that correct settings being used for TDocHotFilterSettings	Fixed	Erikas
PM86.4.1	5490	User hasn't security function 'Create new entity ' can create a new entity from Specific saga matter DE, in invoked Address Book window. Comments: For ex. Address Bokk window can be accessible: Overview/ Source Branch: Click New, select Person/Company, click Source arrow button.	Fixed	Saulius
PM86.4.1	5492	User hasn't security function 'Open entity information' can open entity DE from workflow DE	Fixed	Saulius
PM86.4.1	5494	User hasn't security function 'Remove entity from matter' can remove entity from specific matter DE.	Fixed	Airenas
PM86.4.1	5508	User hasn't security function 'Change matter Number ', he create a new matter and can not enter matter number .	Fixed	Airenas
PM86.4.1	5509	User hasn't security function 'Change Matter search name', he can change matter search name in specific matter DE.	Fixed	Airenas
PM86.4.1	5510	User hasn't security function 'Change matter law type' can change matter law type in specific matter DE.	Fixed	Airenas
PM86.4.1	5511	User hasn't security function 'Change matter client/billable# ' can change client/billable number in specific matterDe>Overview>Billing tab.	Fixed	Airenas

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PM86.4.1	5512	User hasn't security function 'Change Matter Date opened' can change matter date opened in specific matter DE	Fixed	Airenas
PM86.4.1	5514	User hasn't security function 'Change matter Status' can change matter status in specific matter DE.	Fixed	Airenas
PM86.4.1	5515	User hasn't security function 'Change matter jurisdiction' can change matter jurisdiction in specific matter DE.	Fixed	Airenas
PM86.4.1	5516	User hasn't security function 'Create New File number ' can create file number in new specific matter DE	Fixed	Airenas
PM86.4.1	5519	Note listing> Note info column> try filter in Grid column, have got an error 'Invalid column name...'	Fixed	Arturas
PM86.4.1	5520	User hasn't security function 'Create matter matter #' can create matter number in new specific or standart matter DE.	Fixed	Airenas
PM86.4.1	5521	User hasn't security function 'Create Matter Client/Billable#' can create Client/Billable# in new specific matter DE	Fixed	Airenas
PM86.4.1	5523	User hasn't security function 'Create Matter Date opened ' can create matter date opened in new specific matter DE.	Fixed	Airenas
PM86.4.1	5524	User hasn't security function 'Create Matter Status ' can create matter status in new specific matter DE	Fixed	Airenas
PM86.4.1	5531	If user hasn't security function 'View Jurisdiction 'and he opens matter setings>Jurisdiction tab- has got an error:'Cannot focus a disabled or invisible window.'	Fixed	Airenas
PM86.4.1	5532	User hasn't security function 'Open annotation ' can open annotation item by double click	Fixed	Audrius
PM86.4.1	5535	User has no security "View Issue Listing". In Issue Settings he can see Issue listing.	Fixed	Audrius
PM86.4.1	5537	User hasn't security function 'Create public template ' can create public template in workflow settings.	Fixed	Saulius
PM86.4.1	5540	User hasn't security function 'Edit Litigation: Negotiations ' can edit litigation negotiations in specific saga matter DE>Negotiations tab> Special Damages and Injury tabs.	Fixed	Airenas

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PM86.4.1	5547	User hasn't security function 'Edit Litigation:Plaintiff' can edit this tab, using edit button	Fixed	Airenas
PM86.4.1	5549	User hasn't security function 'Edit Litigation:Defendant' can edit this tab.	Fixed	Airenas
PM86.4.1	5551	User hasn't security function 'Edit Litigation:Def. Cars' can edit this tab.	Fixed	Airenas
PM86.4.1	5552	User hasn't security function 'Edit Litigation:Def. Other Entities' can edit this tab.	Fixed	Airenas
PM86.4.1	5556	Matter Listing> Status Age column> try filter in Grid column, have got an error 'Invalid column name...'	Fixed	Arturas
PM86.4.1	5584	Remove sql of select 1 from settings where 1 = 2 (this was for bde only in certain situations - we don't need it anymore)	Fixed	Arturas
PM86.4.1	5603	Groupware listing grid: when I filter Start Time column, I get error message "Invalid column name NEWTIME". Comments: But filter by time columns can't be done still, because components can't do this yet. QA: According to Arturas it is not component bug.	Fixed	Saulius
PM86.4.1	5617	The following securities need to be created: 1.Select Caption; 2.Select and Edit Caption 3.Select COS 4.Select and Edit COS	Fixed	Erikas
PM86.4.1	5632	Sending Note as email before save is pressed (I did assign matters and entities so it should have posted) results in Kernel access Violations	Denied. CNR	Audrius
PM86.4.1	5639	If do entity merge (and before merge action check on Fill empty fields checkbox), do not see changes (which are in Pmwin) in Outlook Contacts. Comments: On 8.6.3.2 cannot see merged entity addresses in Outlook Contacs. The same fix must be for addresses too. QA: ENTITIES.DATEREVISED, ENTITIES.REVISORID now are filled always, when entity merge are done. Response: Perhaps it can be treated as entity merge code because ENTITIES.DATEREVISED field is not updated there. SAULIUS (04/30/2001): Added update trigger for ADDRESS table to update DATEREVISED.	Fixed	Saulius
PM86.4.1	5646	The new Print Report to Printer dialog box has four buttons: [Preview] -- When clicked, should display a preview of the report using the defined parameters. [Print] -- When clicked, should display the Windows-type Print dialog box, and then print the report to the printer using the defined parameters. Right now, clicking this button	Fixed	Vygingtas

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		displays a preview of the report, and that is wrong. [Apply] -- I have no idea what use case this would apply to, so remove. [Cancel] -- When clicked, cancels the printing of the report. Response: I fixed Print button to print, not to show preview. I did not touch Apply button, because it has functionality to remember changed report Title		
PM86.4.1	5647	Create standart matter, assign law type which has law type with auxiliary . After open this matter goes to aux. field, enter any value and go to the General tab- there appears an auxiliary button. Comments: The button should only show when there is an EXE (custom) auxiliary assigned to a law type.	Fixed	Airenas
PM86.4.1	5650	If in Outlook Contact De fill state field, in PMWin >entity DE can not see this field. The same is when in PMWin first country field enter any value- in Outlook Contacts do not see anything. Comments: This is a bug in Entities (for Saulius). When one opens any entity and goes to "Addresses" tab, he/she will see correct "State" value in the listing, but if he/she hits "Edit" - "State" field is gone (if it's value isn't from the predefined USA states set). "The same is when in PMWin first country field enter any value- in Outlook Contacts do not see anything." - CNR.(Rimas Luksys) Response: SAULIUS: "State" field in Entity DE-> Edit Address fixed.	Fixed	Saulius
PM86.4.1	5651	User has no security "View Matter Listing". In workflow DE Matter field cowboy hat lookup he can see matter listing.	Fixed	Saulius
PM86.4.1	5652	If user hasn't security function 'Open matter information' can open matter De from entities listing>Related matters screen.	Fixed	Airenas
PM86.4.1	5653	If user hasn't security function 'Open matter information' can open matter De from File menu.	Fixed	Airenas
PM86.4.1	5654	User hasn't security function 'View Note listing ' can see Note listing in entity DE. Response: CNR. It fixed in some previous version.	Denied, CNR.	Saulius
PM86.4.1	5657	User hasn't security function 'Create new Groupware item' can create a new groupware item in Note DE	Fixed	Audrius
PM86.4.1	5659	User hasn't security function 'Create New Workflow ' can create a new Plan item in global workflow listing. Comments: Can create a new item in Workflow listing>Calendar tab or in specific matter DE too.	Fixed	Saulius

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		<p>QA: New corresponding bugs added to Linas and Airenas (D.V.)</p> <p>Response: For complete fix - in calend.pas, procedure TestMenu check for event assignment to New menu item (I think - responsible Linas). For specific matter DE - responsible Airenas.</p>		
PM86.4.1	5660	<p>Matter: Overview: General screen Clients tab. Entity Assignment wizard is enabled. Hit Assign > Assign wizard window appears. Choose entity which has type = Attorney and hit Next > Choose role = Adjuster, choose party = defendant > hit Finish > get an error</p> <p>Comments: "Invalid object name '#party'."</p>	Fixed	Saulius
PM86.4.1	5661	<p>User hasn't security function 'Open Workflow Information ' can open workflow items information in matter DE, Workflow/Plan tab.</p>	Fixed	Saulius
PM86.4.1	5662	<p>Select All Columns in Global Doc Listing, Save Grid. Close/Open Global Doc Listing, Select All Authors: SQL Error- Either BOF or EOF is TRUE, or the current record has been deleted. Requested operation requires a current record</p> <p>Comments: There are no errors when the SQL is run through Query Analyzer: SELECT TOP 300 DOCCAT.DESCRPTION AS DOCUMENTCATEGORYDESC , DOCUMENT.DATECREATED , DOCUMENT.DESCRPTION , CREATOR.CODE AS CREATORCODE , AUTHOR.CODE AS AUTHORCODE , DOCUMENT.FILENAME , DOCCAT.CODE AS DOCUMENTCATEGORYCODE , DOCFORM.CODE AS DOCUMENTAPPLCODE , DOCFORM.DESCRPTION AS DOCUMENTAPPLDESC , DOCINDEX.CODE AS DOCUMENTINDEXCODE , DOCINDEX.DESCRPTION AS DOCUMENTINDEXDESCR , DOCINDEX.PATH AS DOCUMENTINDEXCPATH , DOCTYPE.CODE AS DOCUMENTTYPECODE , DOCTYPE.DESCRPTION AS DOCUMENTTYPEDESCR , DOCUMENT.DATEREVISED , DOCUMENT.DOCDATE , DOCUMENT.INCOMINGDOC , DOCUMENT.PATH , DOCVER.DESCRPTION AS VERSONDESCRPTION , DOCVER.FILENAME AS VersonFILENAME , DOCVER.VERSIONDATE AS VERSIONDATE , REVISOR.CODE AS REVISORCODE , LAWTYPE.DESCRPTION AS LAWTYPEDESC , PRIMATTER.MATTERNUMBER AS MATTERNUMBER , PRIMATTER.SHORTMATTERNAME AS SHORTMATTERNAME , SITES.DESCRPTION AS SITEDESCR , DOCUMENT.VERSIONS , EMPLOYER.CODE AS EMPLOYERCODE , SITES.CODE AS SITECODE , DOCUMENT.AUTHORID , DOCUMENT.AUTHORID AS AUTHORID_LP , DOCUMENT.CATEGORYID , DOCUMENT.CATEGORYID AS CATEGORYID_LP ,</p>	Denied. CNR.	Airenas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		<p>DOCUMENT.DMID , DOCUMENT.DOCUMENTID , DOCUMENT.EVIDENTIARY , DOCUMENT.FORMATID , DOCUMENT.FORMATID AS FORMATID_LP , DOCUMENT.INDEXID , DOCUMENT.INDEXID AS INDEXID_LP , DOCUMENT.ISLOCKED , DOCUMENT.ISPROFILEONLY , DOCUMENT.ISVERSIONCONTROL , DOCUMENT.SITEID , DOCUMENT.SITEID AS SITEID_LP , DOCUMENT.TYPEID , DOCUMENT.TYPEID AS TYPEID_LP FROM DOCUMENT INNER JOIN DOCCAT ON DOCUMENT.CATEGORYID=DOCCAT.CATEGORYID LEFT JOIN ENTITIES CREATOR ON DOCUMENT.CREATORID=CREATOR.ENTITYID LEFT JOIN ENTITIES AUTHOR ON DOCUMENT.AUTHORID=AUTHOR.ENTITYID INNER JOIN DOCFORM ON DOCUMENT.FORMATID=DOCFORM.FORMATID INNER JOIN DOCINDEX ON DOCUMENT.INDEXID=DOCINDEX.INDEXID INNER JOIN DOCTYPE ON DOCUMENT.TYPEID=DOCTYPE.TYPEID LEFT JOIN DOCVER ON DOCUMENT.DOCUMENTID=DOCVER.DOCUMENTID LEFT JOIN ENTITIES REVISOR ON DOCUMENT.REVISORID=REVISOR.ENTITYID INNER JOIN MATTER PRIMATTER ON DOCUMENT.MATTERID=PRIMATTER.MATTERID INNER JOIN LAWTYPE ON PRIMATTER.LAWTYPEID=LAWTYPE.LAWTYPEID INNER JOIN SITES ON DOCUMENT.SITEID=SITES.SITEID LEFT JOIN ENTITIES EMPLOYER ON AUTHOR.SUPERIORID=EMPLOYER.ENTITYID WHERE ((DOCVER.FILENAME = DOCUMENT.FILENAME) OR (DOCVER.DOCUMENTID IS NULL)) AND DOCUMENT.DATECREATED >= '3/24/2001' ORDER BY DOCUMENT.DATECREATED DESC</p> <p>QA: pmwin86 db on Madness Response: CNR</p>		
PM86.4.1	5677	User has no security "View Entities Listing". Timeslip settings Hourly Billing Rate tab > Client field Cowboy Hat Lookup will display entity listing.	Fixed	Audrius
PM86.4.1	5684	User has no security "View Matter Listing". Go to Timeslip Settings Hourly Billing Rates tab. Double-click any item > Hourly Billing Rate window appears. Matter field Cowboy Hat Lookup will display matter listing.	Fixed	Audrius
PM86.4.1	5685	User has no security "View Matter Listing". In Timeslip DE or timeslip template DE Matter field cowboy hat lookup he can see matter listing.	Fixed	Audrius
PM86.4.1	5686	User has no security "View Issue Listing". In Matter DE or Entity DE Tree view tab he can see this listing.	Fixed	Audrius
PM86.4.1	5687	Matter Settings Templates tab hit New > get an error: "QueryMatter: Field	Fixed	Airenas

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		'STATUSDATE' not found". After that PMWin crashes		
PM86.4.1	5690	Document Profile - if a description is not entered, 80 would fill in Document Type for the description. Now - you are prompted to fill in the description QA: Not sure who made this change but prior functionality should be restored	Fixed	Erikas
PM86.4.1	5691	The following security must be implemented: "Edit Litigation: Def. Insurance"	Fixed	Erikas
PM86.4.1	5692	User has no security "View Annotation Listing". Note DE Related Annotations tab > here the user can see annotation listing. Also here > hit Assign > get Annotation listing.	Fixed	Audrius
PM86.4.1	5701	Create "Change File Number" functional security definition.	Fixed	Erikas
PM86.4.1	5702	Implement "Change File Number" security	Fixed	Airenas
PM86.4.1	5703	User has no security "View Entity Listing". Workflow DE Location field Cowboy Hat Lookup will display entity listing. Also in Workflow DE hit Postpone this event > Postponed Info window appears. Comments: Postponed By field Cowboy Hat Lookup will display entity listing. QA: + fixed Judge "Cowboy Hat" in Court Event, Workflow DE. + fixed parent organization "Cowboy Hat" in Entity DE.	Fixed	Saulius
PM86.4.1	5709	"Change Matter Closed#" function - when user does not have this function assigned, he can change this number in litigation specific matter, Overview/ Billing/ File Disposition/ "Closed File #" field.	Fixed	Airenas
PM86.4.1	5710	"Change Matter Date Closed" function - when user does not have this function assigned, he can change this date in litigation specific matter, Overview/Billing/File disposition "Closed Date" field	Fixed	Airenas
PM86.4.1	5711	Create Matter Client/Billable# security function: when user has not have this security function assigned, and has Change Matter Client/Billable#, he should be allowed to change the number when editing, if the number field contains null.	Fixed	Airenas
PM86.4.1	5717	User has no security "Edit Public Template". He can edit public groupware templates in Groupware Settings Groupware Template tab. QA: + fixed 'Create Public Template' and 'Delete Public Template' in Groupware templates.	Fixed	Saulius
PM86.4.1	5735	Remove the following security functions for litigation specific matter, Overview tab. Comments: View Litigation: General TO View Litigation: Ovrw. General Edit	Fixed	Erikas

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		Litigation: General TO Edit Litigation: Ovrw. General View Litigation: Incident/Facts TO View Litigation: Ovrw. Incident/Facts Edit Litigation: Incident/Facts TO Edit Litigation: Incident/Facts View Litigation: Evaluation TO View Litigation: Ovrw. Evaluation Edit Litigation: Evaluation TO Edit Litigation: Ovrw. Evaluation View Litigation: Source TO View Litigation: Ovrw. Source Edit Litigation: Source TO Edit Litigation: Ovrw. Source View Litigation: Court TO View Litigation: Ovrw. Court Edit Litigation: Court TO Edit Litigation: Ovrw. Court View Litigation: Office Expenses TO View Litigation: Ovrw. Office Expenses Edit Litigation: Office Expenses TO Edit Litigation: Ovrw. Office Expenses View Litigation: Companion Matters TO View Litigation: Ovrw. Companion Matters Edit Litigation: Companion Matters TO Edit Litigation: Ovrw. Companion Matters View Litigation: Caption TO View Litigation: Ovrw. Caption Edit Litigation: Caption TO Edit Litigation: Ovrw. Caption		
PM86.4.1	5736	Add the following security functions for litigation specific matter, Overview tab. Comments: Edit Litigation: Ovrw. Ret. Overview Edit Litigation: Ovrw. Ret. Report/Bill to Edit Litigation: Ovrw. Ret. File Disposition Edit Litigation: Ovrw. Neg. Negotiation Log Edit Litigation: Ovrw. Neg. Special Damages Edit Litigation: Ovrw. Neg. Injury Edit Litigation: Ovrw. Neg. Medical/Expert Records Edit Litigation: Ovrw. Neg. Policies Edit Litigation: Ovrw. Neg. No Fault Submissions & Denials Layout Edit Litigation: Ovrw. Inv. Police Edit Litigation: Ovrw. Inv. Investigation Agencies Edit Litigation: Ovrw. Inv. Witnesses View Litigation: Ovrw. Ret. Overview View Litigation: Ovrw. Ret. Report/Bill to View Litigation: Ovrw. Ret. File Disposition View Litigation: Ovrw. Neg. Negotiation Log View Litigation: Ovrw. Neg. Special Damages View Litigation: Ovrw. Neg. Injury View Litigation: Ovrw. Neg. Medical/Expert Records View Litigation: Ovrw. Neg. Policies View Litigation: Ovrw. Neg. No Fault Submissions & Denials Layout View Litigation Ovrw. Inv. Police View Litigation Ovrw. Inv. Investigation Agencies View Litigation Ovrw. Inv. Witnesses	Fixed	Erikas
PM86.4.1	5737	Implement the following security functions, for litigation specific matter Overview tab. Comments: Edit Litigation: Ovrw. Ret. Overview Edit Litigation: Ovrw. Ret. Report/Bill to Edit Litigation: Ovrw. Ret. File Disposition Edit Litigation: Ovrw. Neg. Negotiation Log Edit Litigation: Ovrw. Neg. Special Damages Edit Litigation: Ovrw. Neg. Injury Edit Litigation: Ovrw. Neg. Medical/Expert Records Edit Litigation: Ovrw. Neg. Policies Edit Litigation: Ovrw. Neg. No Fault Submissions & Denials Layout Edit Litigation: Ovrw. Inv. Police Edit Litigation: Ovrw. Inv. Investigation Agencies Edit Litigation: Ovrw. Inv. Witnesses View Litigation: Ovrw. Ret. Overview View Litigation: Ovrw. Ret. Report/Bill to View Litigation: Ovrw. Ret. File Disposition View Litigation: Ovrw. Neg. Negotiation Log View Litigation: Ovrw. Neg. Special Damages View	Fixed	Airenas

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		Litigation: Ovrw. Neg. Injury View Litigation: Ovrw. Neg. Medical/Expert Records View Litigation: Ovrw. Neg. Policies View Litigation: Ovrw. Neg. No Fault Submissions & Denials Layout View Litigation Ovrw. Inv. Police View Litigation Ovrw. Inv. Investigation Agencies View Litigation Ovrw. Inv. Witnesses		
PM86.4.1	5738	Delete the following security functions for litigation specific matter, Overview tab. Comments: Edit Litigation: Retainer Edit Litigation: Negotiations Edit Litigation: Investigation	Fixed	Erikas
PM86.4.1	5739	Add the following security functions. Comments: 1) for litigation specific matter Defendant tab - Edit Litigation: Def. Insurance 2) for litigation specific matter Plaintiff tab - Edit Litigation: Pl. Injury	Fixed	Erikas
PM86.4.1	5740	Implement the following security functions. Comments: 1) for litigation specific matter Defendant tab - Edit Litigation: Def. Insurance 2) for litigation specific matter Plaintiff tab - Edit Litigation: Pl. Injury	Fixed	Airenas
PM86.4.1	5741	Delete the following security functions for litigation specific matter, Overview tab. Comments: Edit Litigation: Retainer Edit Litigation: Negotiations Edit Litigation: Investigation	Fixed	Airenas
PM86.4.1	5743	Add the following security functions. Comments: PMRemote.Install PMRemote.Download PMRemote.Download AddrBook PMRemote.Upload	Fixed	Erikas
PM86.4.1	5744	Implement the following security functions. Comments: PMRemote.Install PMRemote.Download PMRemote.Download AddrBook PMRemote.Upload	Fixed	Aurelija
PM86.4.1	5754	Create New Entity - user does not have this security right assigned. I add a linked action "Create a player record" in workflow de, and then execute - new entity de is displayed, I can create an entity.	Fixed	Saulius
PM86.4.1	5755	Create New Document - user does not have this security right assigned. I add a linked action "Create a document" in workflow de, and then execute - new document de is displayed, I can create a document.	Fixed	Saulius
PM86.4.1	5756	Create New Timeslip - user does not have this security right assigned. I add a linked action "Create a timeslip" in workflow de, then execute - new timeslip de is displayed, I can create a timeslip.	Fixed	Saulius

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PM86.4.1	5757	Create New Groupware Item - user does not have this security right assigned. I add a linked action "Create an email" in workflow de, then execute - I can create a groupware item.	Fixed	Saulius
PM86.4.1	5758	Create New Matter - user does not have this security right assigned. I add a linked action "Create a matter" in workflow de, and then execute - new matter de is displayed, I can create a matter.	Fixed	Saulius
PM86.4.1	5759	Create New Note - user does not have this security right assigned. I add a linked action "Create a note" in workflow de, then execute - new note de is displayed, I can create a note.	Fixed	Saulius
PM86.4.1	5761	User has no security "Open Issue". He cannot see issue settings tab in Administration Settings list. Response: This happens because of bugs in DB with "View Issue Listing" security.	Fixed	Audrius
PM86.4.1	5762	User has no security "Open Issue". He cannot see issue tab in Matter DE. Response: AIRENAS: "View Issue Listing" security number is not correct in database, contact Erikas.	Fixed	Erikas
PM86.4.1	5763	Create New Timeslip - user does not have this security right assigned. I check "Generate Timeslip in matter" user preferences setting - new timeslip de is displayed when closing a matter.	Fixed	Airenas
PM86.4.1	5765	Implement Word Wrap for Firm name to accept the full field length from the db	Fixed	Saulius
PM86.4.1	5768	User has no security "Open Workflow Information". Open litigation specific matter DE > Overview > General tab. If there are records in Critical Deadlines window, hit Edit > get Workflow information window.	Fixed	Airenas
PM86.4.1	5770	Create New Workflow - user does not have this security right assigned. I add a "Execute a program function" linked action to a workflow record, execute it - a new plan is started.	Fixed	Saulius
PM86.4.1	5771	Change Matter Status - user does not have this security function assigned. I add Linked action to a workflow record "Execute a program function" - change matter status, execute it - the matter status is changed.	Fixed	Saulius
PM86.4.1	5773	Drag and Drop - if quotes "" are in the subject line, Error: unable to parse condition at "value" Response: CNR	Denied, CNR.	Saulius

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PM86.4.1	5777	Delete Party security function. When user does not have this security function assigned, only Delete button should be disabled in litigation specific matter, Plaintiff tab, Plaintiff branch, and in Defendant tab/ Defendant branch. Comments: For now, New and Edit buttons are also disabled.	Fixed	Airenas
PM86.4.1	5778	Delete Party security function. When user does not have this security function assigned, he can remove from matter players list entities added as parties.	Fixed	Saulius
PM86.4.1	5782	Delete Workflow - user does not have this security function assigned. Comments: But he can delete a workflow record in workflow calendar - by using right click menu, Ctrl+D, or Del. Also he can delete a workflow item in matter DE workflow tab, plan tree view, by using File/Delete, or Ctrl+D.	Fixed	Saulius
PM86.4.1	5783	Add "Change Party" security function.	Fixed	Erikas
PM86.4.1	5792	Rename securities "Edit Litigation: Plaintiff" and "Edit Litigation: Defendant" to "Edit Litigation: Pl. General" and "Edit Litigation: Def. General".	Fixed	Saulius
PM86.4.2	4504	Entity is assigned to matter with multiple roles. When logged in as that entity and selecting "My Matters" Quick Filter, Matters where entity has multiple roles will be repeated as many times as the roles for that matter QA: The same problem exists with Entity>related matters add Distinct to this query - purpose is to see distinct matters Response: Bug 4507 was fixed on 01/26/2001. 'Entity>related matters' listing shows description of assign roles - so it will duplicate matter if entity is assigned several times - there is not a bug.	Denied.	Erikas
PM86.4.2	4584	Enable support for the following functions: (Select, Select and Edit, Select and Design) Caption, Certificate. See comments. Comments: If the user does not have Select Caption, or Select and Edit Caption, or Select and Design Caption, the Caption button should not appear on the Matter Info screen. If the user does not have Select COS, or Select and Edit COS, or Select and Design COS, the Certificate button should not appear on the Matter Info screen. QA: Updated April 28, according to new specifications from Tom, and returned status to Pending. (The Select, Select and Edit functions are already implemented).	Fixed	Airenas
PM86.4.2	4882	ALL time fields default to current computer time. NO SECONDS.	Fixed	Erikas
PM86.4.2	5615	Document listing, click New, select document type, click "Choose Component" window button - get an error "Access Violation."	Fixed	Erikas

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PM86.4.2	5649	In Document listing open a new document De , fill index field and do cancel or save- have got access violation error.	Fixed	Erikas
PM86.4.2	5798	Filter Tree- Selecting top line Item of "Filters" actually acts as Clear filter or No filter-, which is the item immediately below.	Fixed	Airenas
PM86.4.2	5800	Filter Tree- Selecting top line Item of "Filters" actually acts as Clear filter or No filter-, which is the item immediately below.	Fixed	Audrius
PM86.5.1	4290	Workflow Records, Linked Actions. Workflow record has 2 linked actions, which are document templates. User opens workflow record and mark it done. Linked actions were not completed. See comments. Comments: System at this point should give user a dialog: Do you want to execute linked actions? If user says yes, system takes him to the linked actions tab and highlights the first action not completed. If there is only one linked action, system does not take user to the link actions tab. Instead it should execute that action (All actions which are not Workflow). The only exception to automatic execution is if user checked "User to approve action before execution" on the template level.	Denied	Saulius
PM86.5.1	4891	Modify global.pas to support TOP statement while using MS SQL 2000.	Fixed	Erikas
PM86.5.1	4913	Site security is not working in Entity DE> Contacts tab> Contacts screen, in name field using Shift+%. QA: New bug added for Airenas. Response: Fixed site security in Contacts listing. In Entity DE> Contacts tab>Contacts screen>Contact DE>'Name' faucet filter - Airenas responsible.	Fixed	Saulius
PM86.5.1	5000	In Auxiliary settings> auxiliary tab create a new item. After can not delete this item.(The item is not assigned anywhere) Response: CNR - too old bug.	CNR	Erikas
PM86.5.1	5038	In Security settings>Descriptions, Define Security, Assign Security, Matter Security, Site Security and Web Entities tabs > Select Visible columns screen unassign all fields- have got errors.	Fixed	Erikas
PM86.5.1	5041	Retrieve a filter in Matter Listing in which is selected filtering by entity type. Apply filter - have got general sql error 'Tables 'ENTITIES' and 'ENTITIES' have the same exposed names. Use correlation names to distinguish them.' Response: CNR - too old bug.	CNR	Erikas
PM86.5.1	5054	In Annotation listing is not working query and filter. Can not open filter by using right	CNR	Erikas

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		click. Response: CNR - too old bug.		
PM86.5.1	5100	Author Field in Document profile will no longer return searches when entity code or % is entered.	Fixed	Erikas
PM86.5.1	5224	In Label settings create two the same items. Have got violation of primary key error. If leave word translation field empty- after places of this word are empty too. This field must be required.	Fixed	Erikas
PM86.5.1	5387	In Document De> Players tab >Assign Players screen >Available Players>Select Visible columns screen unassign all columns- have got an error:'The column prefix "ASSIGN' does not match with a table name or alias used in the query'.	Fixed	Erikas
PM86.5.1	5690	Document Profile - if a description is not entered, 80 would fill in Document Type for the description. Now - you are prompted to fill in the description QA: Not sure who made this change but prior functionality should be restored n 80 - new doc - profile screen - do not enter desc, tab through fields - desc would automatically populate with doc type. in 86 - desc is required but this functionality from 80 s not there - many clients like the old functionality	Fixed	Erikas
PM86.5.1	5698	User hasn't security function 'Create New Workflow ' can create a new Plan item in specific matter DE. QA: In 8.6.4.1.- still can create a new plan in matter DE workflow tab.	Fixed	Saulius
PM86.5.1	5718	User has no security "Edit Public Filter". He can edit public matter filter in Matter listing filter.	Fixed	Erikas
PM86.5.1	5719	User has no security "Edit Public Filter". He can edit public entity filter in Address Book listing filter.	Fixed	Erikas
PM86.5.1	5720	User has no security "Edit Public Filter". He can edit public document filter in Document listing filter.	Fixed	Erikas
PM86.5.1	5721	User has no security "Edit Public Filter". He can edit public timeslip filter in Timeslip listing filter.	Fixed	Erikas
PM86.5.1	5722	User has no security "Edit Public Filter". He can edit public note filter in Note listing filter.	Fixed	Erikas
PM86.5.1	5723	User has no security "Edit Public Filter". He can edit public groupware filter in Groupware listing filter.	Fixed	Erikas

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PM86.5.1	5724	User has no security "Edit Public Filter". He can edit public workflow filter in Workflow listing filter.	Fixed	Erikas
PM86.5.1	5769	Review and update 8.6. DB so that implemented securities should work properly. Comments: Now, for ex. user with all the security rights assigned can not view issues listings in matter DE, and in Administration settings. Response: View Issue Listing security was wrong on database.	Denied	Erikas
PM86.5.1	5788	User has no security "View Litigation: Plaintiff". He can see Plaintiff tab in litigation specific matter DE.	Fixed	Airenas
PM86.5.1	5789	User has no security "View Litigation: Defendant". He can see Defendant tab in litigation specific matter DE.	Fixed	Airenas
PM86.5.1	5790	Rename the following security definitions: "View Litigation: Retainer", "View Litigation: Negotiations" and "View Litigation: Investigation" into "View Litigation: Ovrw. Retainer", "View Litigation: Ovrw. Negotiations" and "View Litigation: Ovrw. Investigation" Comments: and "View Litigation: Ovrw. Investigation"	Fixed	Erikas
PM86.5.1	5791	Implement the following securities: "View Litigation: Pl. General" and "View Litigation: Def. General". QA: The following securities will work as "View Litigation: Plaintiff" and "View Litigation: Defendant" in previous versions. Response: Before testing - make sure you have executed Erikas sql script related with this.	Fixed	Airenas
PM86.5.1	5799	Filter Tree- Selecting top line Item of "Filters" actually acts as Clear filter or No filter-, which is the item immediately below.	Fixed	Saulius
PM86.5.1	5801	Filter Tree- Selecting top line Item of "Filters" actually acts as Clear filter or No filter-, which is the item immediately below.	Fixed	Saulius
PM86.5.1	5802	Filter Tree- Selecting top line Item of "Filters" actually acts as Clear filter or No filter-, which is the item immediately below.	Fixed	Saulius
PM86.5.1	5803	Add the following securities: "View Litigation: Pl. General" and "View Litigation: Def. General".	Fixed	Erikas
PM86.5.1	5805	Merge Entities security function. Comments: Instead on "Merge Entities" security function use "ENTITY MERGE" security function. This is requested because in Pmwin code ENTITY MERGE is used	Fixed	Saulius

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		in most cases, and Merge Entities will have to be deleted. Response: sfEntityMerge now are used instead sfEntityMergeRightClick.		
PM86.5.1	5824	In Outlook create a Contact with Department. In Pmwin open Entity DE> Contacts tab> New> Select in Name field in Outlook created Contact record> OK. In Contacts tab edit Department field. In Outlook can not see changes. Comments: his bug should be forwarded to Saulius: sgContct.pas unit -> TfrmSagaContacts.btOkClick event -> fields ENTITIES.REVISORID, ENTITIES.DATEREVISED are not being updated. Comment: probably we'll keep getting errors like that until we'll begin updating those fields inside the trigger. Response: Now fields: 'Revisor' and 'daterevised' are updated	Fixed	Airenas
PM86.5.1	5839	Document template: Create new, click Save - nothing happens, document profile is not saved and form is not closed.	Fixed	Erikas
PM86.5.1	5843	Document templates. When I try open or apply a document template, created in old documents interface (ir older PM versions), I get access violation error.	Fixed	Erikas
PM86.5.1	5845	Add security function "Install Adobe Acrobat Reader".	Fixed	Erikas
PM86.5.1	5852	There is no way to delete a Title from Entity info.	Fixed	Saulius
PM86.5.3	4357	In Timeslip Template is not working refresh button. Comments: Need clarification on this.	Fixed	Audrius
PM8.6.5.1	4318	The Options screen in Document Assembly Settings has no Close button.	Document Assembly Settings	Ruslan
PM86.5.3	4904	When using a timeslip Template- date saved in Template record overrides Today's date. Comments: example- Template has date of 4/26/2000, Timeslip I created today 10/23/2000 now has a date of 4/26/2000 Disable Date field when Creating a template. When template is applied, default to Today's date. QA: Either Null date when record is saved or populates with Today's date after selection of template. This is going to be made a standard for all Templates 4055-8.5 Response: Denied, because the same is 5869.	Denied	Audrius
PM86.5.3	5065	Document assembly fields do not include the necessary punctuation Comments: For instance, when you choose an Entity Name with PE, there is no comma before the "Esq.". The old-field blocks need to be updated to include the punctuation.	Fixed	Ruslan

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PM86.5.3	5096	Occasionally, the system will not retrieve the existing document template, but will replace it with a blank document. See Comments Comments: Document Assembly Settings > Components Tab > Select component type=User Defined Merge Code. Highlight an existing clause and click design. If template Occasionally, the system will not retrieve the existing document template, but will replace it with a blank document. In other words, override the existing template with a blank document. End result: User loses the Word Processor template Response: This looks like an old bug that was fixed. It was Saga Document Assembly Object that did override. (Ruslan).	Denied	Ruslan
PM86.5.3	5273	Matter DE > Issues tab. If there is no issue records, then hit New > Available Issues listing appears > select at least 2 issues and hit Close > get an error: "Either BOF or EOF is true, or the current record has been deleted.."	Fixed	Audrius
PM86.5.3	5304	Data lost when converting org entity to individual entity. Comments: The company name field was populated with the following: A & B Marine Trucking. the resulting individual entity record had: last name: Trucking first name: A middle name: & "B Marine" had disappeared. Response: Done in PM 8.6- Saulius Done in PM 8.0- Rimas	Fixed	Saulius
PM86.5.3	5548	User hasn't security function 'Edit Litigation:PI. User defined' can edit this tab.	Fixed	Airenas
PM86.5.3	5550	User hasn't security function 'Edit Litigation:Def. User defined' can edit this tab. Comments: Linas said form designer does not have possibility to make it read-only - to prevent editing. Linas or Aurelija should implement it first.	Fixed	Airenas
PM86.5.3	5663	The Parameter is incorrect error when opening Document settings Comments: a second attempt results in access violation	CNR	Erikas
PM86.5.3	5664	Parameter is Incorrect when opening Security settings. See comments - this one is quite strange Comments: Login as user with sufficient rights. Preferences should be set to display matter listing when opening PM. Immediately open Security Settings- Parameter Error. Close Matter Listing, Security Settings will now open. QA: user: Ken no pass DB pmwin 86 Madness	CNR	Erikas
PM86.5.3	5742	Implement the following securities. Comments: Select Caption: If the a user has only this permission, the Select a Caption dialog box should only have Select and Cancel buttons. Select and Edit	Fixed	Ruslan

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		<p>Caption: If the a user has this permission, the Select a Caption dialog box should only have Select, Select & Open in WP, and Cancel buttons. Select and Design Caption: If the a user has this permission, the Select a Caption dialog box should have Select, Select & Open in PM, Select & Open in WP, and Cancel buttons. Select COS: If the a user has only this permission, the Select a COS dialog box should only have Select and Cancel buttons. Select and Edit COS: If the a user has this permission, the Select a COS dialog box should only have Select, Select & Open in WP, and Cancel buttons. Select and Design COS: If the a user has this permission, the Select a COS dialog box should have Select, Select & Open in PM, Select & Open in WP, and Cancel buttons.</p> <p>QA: Updated April 28 (D.V.)</p>		
PM86.5.3	5804	<p>Document Assembly - "Select A Caption", "Select A COS" windows.</p> <p>Comments: If I select a caption in "Select a Caption" window and click "Select and Open in w.p." button, I get an error "Cannot perform this operation on an open dataset". The same with selecting a COS in "Select a COS" window.</p>	Fixed	Ruslan
PM86.5.3	5809	<p>In Workflow listing>Report Settings>Customize tab assign field Priority, hit on 'Preview' button. Have got an error:'Field 'PRIORITY_CALC' not found.</p> <p>Comments: There are no calculated fields printing implemented in Reports. Can't fix, need to research and implement</p>	Denied	Darius
PM86.5.3	5811	<p>There is a button 'Apply' In Report settings (the functionality of Apply button is to remember changed report Title). But it works only once- after i press the apply button the next time it becomes inactive.</p>	Fixed	Airenas
PM86.5.3	5812	<p>In Report Settings>Customize tab all fields are duplicated</p>	Fixed	Airenas
PM86.5.3	5813	<p>The error occurs in Report Settings invoked from any Settings form. In Customize tab i assigned all fields, pressed The Preview button. After repeating that several times, i get the error "Win32Error. Code: 1400, Invalid Window handle", bunch of access violation errors, after that i have to kill PmWin process. I use Windows NT OS. I can get this error randomly in Windows NT 2000.</p>	Fixed	Darius
PM86.5.3	5814	<p>In Document Assembly settings> Assignment tab> Assignment group box>Select Visible columns screen un-assign Law type column: have got an error:'The column prefix 'L' does not match with table name or alias name used in the query.'</p> <p>Comments: In Document Assembly settings> Assignment tab> Assignment group box>Select Visible columns screen un-assign DocCategory column: have got an error:'The column prefix 'DC' does not match with table name or alias name used in</p>	Fixed	Ruslan

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		the query.' In Document Assembly settings> Assignment tab> Assignment groupbox>Select Visible columns screen un-assign DocType column: have got an error:'The column prfix 'DT' does not match with table name or alias name used in the query.' In Document Assembly settings> OLE queries tab> Select Visible columns screen un-assign FieldType column: have got an error:'QAsmOle: Filed "CALCFIELDTYPE' not found.'		
PM86.5.3	5815	In Document assembly settings>OLE Queries tab can not delete any item	Fixed	Ruslan
PM86.5.3	5819	Document Assembly. In litigation specific matter, Overview tab, Caption branch - click New -Select a Caption window is displayed empty, although there are captions created in the system. QA: In litigation specific matter DE, Airenas invokes assembly function MargeSagaCaption(MatterID), and that is all that he does. This is most probably assembly bug. Please create a litigation specific matter in your db and see what happens	CNR	Ruslan
PM86.5.3	5825	In Document Assembly settings> Assignment tab> Assignment bookbox are not working buttons 'New' and 'Open'. Comments: Remove those two buttons.	Fixed, buttons disabled	Ruslan
PM86.5.3	5842	In System settings>General tab >Login options groupbox check on Enabled, save and try to rerun Pmwin- have got a lot of error, after can not open Pmwin. UPDATE- Label will be changed Comments: In "System Settings" if Login option changed to "Enabled" somebody must ensure that right SELECT granted for internal user PMWIN on ENTITY table, otherwise the only way to reverse this is manually go into settings table and change field AUTOLOGIN value from 2 into 1 - use Initials or 0 - Disable. QA: Setting is to ONLY be used when SQL Server is set to use Windows Authentication. Label will be changed to be more descriptive	Denied	Darius
PM86.5.3	5858	Create Boilerplate Component, save, open - Component Type is still displaying Template	Fixed	Ruslan
PM86.5.3	5861	Uncountable access violations when working in Doc Assm Settings and design Comments: I'd provide more information but instances are too numerous to list Response: Denied. No GPFs. Make sure you have correct compilation.(Ruslan).	Denied	Ruslan
PM86.5.3	5863	Civil Action Number is now Case Number yet this is not carried over to Component Field Pick List	Denied	Ruslan

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		<p>QA: We have to work from a base set of labels in PM, which is what Document Assembly uses. Therefore, this bug is denied. (Tom Foley)</p> <p>Response: Unless someone explains what this is about, it is denied. (Ruslan).</p>		
PM86.5.3	5864	<p>Punctuation is automatic in the EntityListing, It is not automatic in Doc Assembly. See Comments</p> <p>Comments: For an entity with ext, suffix (John Doe III CFP) it is not necessary to enter the comma-space in entity fields as these are automatically interpreted. However this has not been carried over to Doc assembly. Entity will appear as follows: John DoeIIIICFP</p>	Fixed	Ruslan
PM86.5.3	5866	<p>COS- not working at all, Added field of CERT_Ent- will not pull in , All text in COS is not populated in Document. Selecting a COS from matter info does not work - the original is still pulled in</p> <p>Comments: I will provide examples</p> <p>Response: Works fine. Denied.(Ruslan)</p>	Denied	Ruslan
PM86.5.3	5869	Remove date field from timeslip template DE.	Fixed	Audrius
PM86.5.3	5870	Remove both date fields from matter template DE - Date Opened and Date Closed	Fixed	Airenas
PM86.5.3	5875	<p>Timeslip Settings Transaction List tab. Hit New > Transactions List window appears. Enter Code and Description > go to Assign Transaction tab > assign at least 2 transactions > go to Assign Sub-Transaction tab.</p> <p>Comments: Here in Transaction field select the first assigned transaction and assign sub-transaction to it. Now in Transaction field select another transaction > get an error: "QuerySubtrAss: Record not found."</p>	Fixed	Audrius
PM86.5.3	5876	Timeslip Settings Transaction List tab. Open an existing transaction > Transactions List window appears. Go to Assign Clients tab > Assign All clients by hitting Assign All [>>] button > get an error: "QueryClientNotAss: Record not found."	Fixed	Audrius
PM86.5.3	5880	Is not working print in all listings and settings. Cannot see print preview.	Fixed	Audrius
PM86.5.3	5882	Choose Place a Call > Place a > Call window > appears. In Duration field I see "1899/12/30". This field should not display date yyyy/mm/dd, only time (as it was in PM 8.5).	Fixed	Audrius
PM86.5.3	5883	Workflow Admin>Actions> Label for Non Public Templates is labeled 'My Templates' This should be changed to Private Templates	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.5.3	5884	Right click option of Execute and Mark Complete is no longer available in a plan Comments: Restore this function Response: Check you securities. For example: if you don't have security 'Create New Entity' - you will not see 'Execute and Mark Complete' option for these Action branches in a plan	Denied	Saulius
PM86.5.3	5888	In Place a Call, Receive a Call, and Phone message windows, entity phone numbers should be loaded into Phone files, after selecting Other Party entity. (See how it works in 8.5).	Fixed	Audrius
PM86.5.3	5889	Timeslip Settings Level tab. Try to delete a level - get an error: "DELETE statement conflicted with COLUMN REFERENCE constraint 'ENTITIES_LEVELID_REF'. The conflict occurred in database 'PMWIN86', table 'ENTITIES', column 'LEVELID' ". Comments: The message must be user-friendly.	Fixed	Audrius
PM86.5.3	5893	Hourly Billing Rates tab. Open an existing Rate > Hourly Billing Rate window appears. Select Client radio button and hit Client field Cowboy Hat Lookup button > Address Book window appears. Role field must be removed from this window.	Fixed	Saulius
PM86.5.3	5899	GW- Project, execute, when all items have been sent choose close. Error- Either EOF or BOF is true or the current record has been deleted. Current operation requires a current record	CNR	Saulius
PM86.5.3	5900	If an Ampersand '&' is used in matter Search name, what appears in the file menu is an Underscore '_'	Fixed	Airenas
PM86.5.3	5902	Document Profile > hit Groupware > get groupware listing. Hit New > get groupware Rule Listing. Radio button Doc. Type is not working.	Fixed	Saulius
PM86.5.3	5904	Enable automatic groupware batch project execution when creating a new matter - the same how it works in 8.5. Comments: During automatic groupware execution, only those groupware templates (included into the automatic batch project) should be executed which are assigned to appropriate law type (in 8.5 this checking does not work).	Fixed	Saulius
PM86.5.3	5909	If auxiliary field is marked as Entry Required (Data Field Editor) , then give a message "Field requires value" if user does not enter field value (now it gives SQL Server error). QA: Consult with Linas.	Fixed	Saulius
PM86.5.3	5911	System Settings -- General Tab Change "Use State Evidentiary" to "Enable	Fixed	Darius

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		Evidentiary"		
PM86.5.3	5913	Take a quick look at your forms and messages and, anywhere you find "Player", replace with "Entity" "Players", replace with "Entities"	Fixed	Audrius
PM86.5.3	5917	Take a quick look at your forms and messages and, anywhere you find "Player", replace with "Entity" "Players", replace with "Entities"	Denied	Ruslan
PM86.5.3	5925	Remove Mass Mail Merge from the Tools Menu	Fixed	Darius
PM86.1	4374	After Creating Timeslip - Retain value from Previous Timeslip if Yes is answered to "Generate another Timeslip?" Comments: Transaction >>> KEEP value upon Generate Another Flat Rate >>> populated based on trans [so it would be kept unless a new Transaction is picked] Description >>> KEEP as long as it is replaced if any applicable fields are changed More - Phase >>> KEEP value upon Generate Another More - Document >>> KEEP value upon Generate Another	Fixed	Audrius
PM86.6.1	4872	I create a new site. After I create a new user which assign to this site. In Security settings> Assign Security tab the user is assigned not to my created site.	Fixed	Saulius
PM86.6.1	4912	Site security is not working in Workflow DE> Players tab> Assign players or Add players screens	Fixed	Saulius
PM86.6.1	4988	Security Settings - Site Security tab	Fixed	Saulius
PM86.6.1	5581	Label translation translates words in notes text. Comments: The translation codes should not impact data a user enters, including notes. It should only impact PM labels, messages, etc.	Fixed	Audrius
PM86.6.1	5593	Groupware: Dragging into PM from Outlook. See comments. Comments: When I forward a message in Outlook to myself, one time (for my message) or two times (for another sender message), adding some additional text, then drag it to PM, and view the imported message - only the original message is imported, without the added text, or sometimes the message is not imported at all, although the program confirms that the message is imported.	Fixed	Saulius
PM86.6.1	5616	Document Profile DE - Comments field. Comments: Open a document profile, click Timeslip button, close the Timeslip DE form - Comments field contains "(COMMENTS)" string, and I can not enter to comments anything. The same if click Groupware button, and then close the	Fixed	Erikas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		document groupware listing. The same after selecting other document profile tabs.		
PM86.6.1	5690	Document Profile - if a description is not entered, 80 would fill in Document Type for the description. Now - you are prompted to fill in the description. QA: Not sure who made this change but prior functionality should be restored n 80 - new doc - profile screen - do not enter desc, tab through fields - desc would automatically populate with doc type. in 86 - desc is required but this functionality from 80 s not there - many clients like the old functionality. 8.6.5.1 Version - when I select document type the first time - description field is filled, but if I delete the description, save - profile is saved with empty description field.	Fixed	Erikas
PM86.6.1	5718	User has no security "Edit Public Filter". He can edit public matter filter in Matter listing filter. QA: The user should not be allowed to change filter name Added 05/07: If the user is creator of the filter, this security should not look at that. This means that user without security Edit Public Filter cannot edit any public filter.	Fixed	Vygintas
PM86.6.1	5719	User has no security "Edit Public Filter". He can edit public entity filter in Address Book listing filter. QA: The user should not be allowed to change filter name Added 05/07: If the user is creator of the filter, this security should not look at that. This means that user without security Edit Public Filter cannot edit any public filter.	Fixed	Vygintas
PM86.6.1	5720	User has no security "Edit Public Filter". He can edit public document filter in Document listing filter. QA: The user should not be allowed to change filter name Added 05/07: If the user is creator of the filter, this security should not look at that. This means that user without security Edit Public Filter cannot edit any public filter.	Fixed	Vygintas
PM86.6.1	5721	User has no security "Edit Public Filter". He can edit public timeslip filter in Timeslip listing filter. QA: The user should not be allowed to change filter name Added 05/07: If the user is creator of the filter, this security should not look at that. This means that user without security Edit Public Filter cannot edit any public filter.	Fixed	Vygintas
PM86.6.1	5722	User has no security "Edit Public Filter". He can edit public note filter in Note listing filter. QA: The user should not be allowed to change filter name Added 05/07: If the user is creator of the filter, this security should not look at that. This means that user without security Edit Public Filter cannot edit any public filter	Fixed	Vygintas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.6.1	5723	User has no security "Edit Public Filter". He can edit public groupware filter in Groupware listing filter. QA: The user should not be allowed to change filter name Added 05/07: If the user is creator of the filter, this security should not look at that. This means that user without security Edit Public Filter cannot edit any public filter.	Fixed	Vygintas
PM86.6.1	5724	User has no security "Edit Public Filter". He can edit public workflow filter in Workflow listing filter. QA: The user should not be allowed to change filter name Added 05/07: If the user is creator of the filter, this security should not look at that. This means that user without security Edit Public Filter cannot edit any public filter.	Fixed	Vygintas
PM86.6.1	5751	User has no security "Open Entity Information". He can open entity information almost everywhere from Matter Litigation specific tabs by hitting Edit button. Ex.: Matter:Plaintiff. There is an entity assigned as plaintiff. Hit Edit>get entity information. Comments: 100% of litigation screens must be reviewed.	Fixed	Airenas
PM86.6.1	5786	User Preferences. Hit Change Password > Change Passw window appears. Hit Ok > get an error, or enter Old password and hit Ok > get the same error: "Parameter object is improperly defined. Inconsistent or incomplete information was provided." Comments: Complete problem description: login as a user to PMWin. Go to user preferences > hit Change Password > get Change Password window. Now (if your old passw was blank) leave Old Password field blank and enter any word in New Password and Confirm Password fields > Ok. Exit PM and login again with the new passw. Go to User Preferences > hit Change Password > get Change Password window. Now hit Ok > get an error.	Fixed	Vygintas
PM86.6.1	5816	In Workflow listing >Workflow query select Matter field- have got error:'Line8: Incorect syntax near 'MATSEC'.	Fixed	Vygintas
PM86.6.1	5848	User has no security "View Entity Listing". Create new entity > in Entity DE go to Contacts tab > hit New > Contacts window appears. Name field cowboy hat lookup will display Entity Listing.	Fixed	Saulius
PM86.6.1	5857	Document Settings - Assign To Type tab. I select one doc type, one category, delete all Assigned Law Types - get an sql error message "DELETE statemnt conflicted with COLUMN REFERENCE constraint.." Comments: ADDED 05/08 by A.A.: Also problem in Doc Settings Type Assign tab: select All Law Categories, All Law Types and one Doc Category. Assign several	Fixed	Erikas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		document types to this combination. Now try to unassign any of the assigned doc types > get an error: DELETE statement conflicted with COLUMN REFERENCE constraint 'CMPNASSN_DOCTYPAS_REF'. The conflict occurred in database 'PMWIN86', table 'CMPNASSN_OLD', column 'DOCTYPASID'.		
PM86.6.1	5859	Document Settings - Assign To Type tab. I select one doc type, one category, delete all Assigned Law Types - get an sql error message "DELETE statement conflicted with COLUMN REFERENCE constraint.." Comments: ADDED 05/08 by A.A.: Also problem in Doc Settings Type Assign tab: select All Law Categories, All Law Types and one Doc Category. Assign several document types to this combination. Now try to unassign any of the assigned doc types > get an error: DELETE statement conflicted with COLUMN REFERENCE constraint 'CMPNASSN_DOCTYPAS_REF'. The conflict occurred in database 'PMWIN86', table 'CMPNASSN_OLD', column 'DOCTYPASID'.	CNR	Erikas
PM86.1	5860	From Doc profile - Select Certificate-Select open in WP- Error: Cannot perform this operation an open dataset Comments: (Login has sufficient permissions)	CNR	Ruslan
PM86.6.1	5867	New document profile DE: make "Assemble Document" the default, and not "Skip Document Assembly".	Fixed	Erikas
PM86.6.1	5873	Site security is not working in Entity DE> Contacts tab> Contacts screen, in name field using Shift+%. Comments: In Entity DE> Contacts tab>Contacts screen>Contact DE>'Name' faucet filter - Airenas responsible	Fixed	Saulius
PM86.6.1	5874	Document DE/ I open a profile, do "Save as template" - get access violation error. Response: CNR	CNR	Erikas
PM86.6.1	5877	I create a template - do not enter primary matter, enter application, select "Assemble Document", save. Create a document, apply this template, click on Template faucet filter - get access violation error.	Fixed	Erikas
PM86.6.1	5878	I create a document, select "Profile only". Select View/Retrieve Template, select a template, apply - get access violation error.	Fixed	Erikas
PM86.6.1	5879	When I copy a document and do not fill Description myself - document with empty description is saved.	Fixed	Erikas
PM86.6.1	5885	From the Document listing, select several documents (at least one must be non-	Fixed	Vygingtas

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		contiguous) r-click and select Groupware - the next window that opens is a plan window, not the groupware listing Comments: as long as all the docs are contiguous, this does not happen QA: (Tom Foley) When multiple profiles are selected, disable Groupware item in right click menu.		
PM86.6.1	5895	I create a new note - click Save. I get a warning message that note is not assigned to any matters etc. I click Cancel. Then I click Save in note DE - I get violation of primary key error.	Fixed	Saulius
PM86.6.1	5897	Note DE. Comments: 1) When I assign all matters in Relate to Matters tab, all matters are assigned. But when I remove all assigned matters - only a part of assigned matters are unassigned. 2) When I do assign all in Relate to Issues tab - not all issues are assigned.	Fixed	Audrius
PM86.6.1	5914	Take a quick look at your forms and messages and, anywhere you find "Player", replace with "Entity" "Players", replace with "Entities"	Fixed	Airenas
PM86.1	5915	Take a quick look at your forms and messages and, anywhere you find "Player", replace with "Entity" "Players", replace with "Entities"	Fixed	Aurelija
PM86.6.1	5916	Take a quick look at your forms and messages and, anywhere you find "Player", replace with "Entity" "Players", replace with "Entities"	Fixed	Erikas
PM86.1	5918	Take a quick look at your forms and messages and, anywhere you find "Player", replace with "Entity" "Players", replace with "Entities"	Fixed	Linas
PM86.6.1	5919	Entity Contacts List Comments: When you are on the Entity Listing, have highlighted an entity, and right-clicked or selected View from the menu, there should be an option to Show Contact (like Related Matters). But it is not there. Don't know if this is a bug or what, because it was supposedly in PM80 and PM81, but not in PM85. Anyway, when you have finished EVERYTHING else, please see about re-enabling this. Lots of our PM80 clients use it, and they will miss it when they move to PM86. The Window that appears should basically be a form (like Related Matters) that has the same columns as Contacts, and lists those contacts assigned to the Entity.	Fixed	Saulius
PM86.6.1	5920	Entity Contacts list. Comments: Please "hide" the "Entity Specific" field on the Entity-Contact listing. It is a functionality that has been basically removed (matter-specific contacts, I think, has	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		been dropped). Do this BEFORE the Show Contacts thing...		
PM86.6.1	5923	I create a new template. Click on Type drop down box the first time - get access violation error.	Fixed	Erikas
PM86.1	5934	Modify DATECREATED and DATEREVISED fields in CMPNNTS table to use YYYY-MM-DD HH:MM:SS format	Fixed	Ruslan
PM86.6.1	5936	Modify DATECREATED and DATEREVISED fields in MATTEMPL table to use YYYY-MM-DD HH:MM:SS format.	Fixed	Airenas
PM86.6.1	5937	Modify DATECREATED and DATEREVISED fields in MATTER table to use YYYY-MM-DD HH:MM:SS format	Fixed	Airenas
PM86.6.1	5938	Modify DATECREATED and DATEREVISED fields in RATE table to use YYYY-MM-DD HH:MM:SS format	Fixed	Saulius
PM86.6.1	5943	Remove .txt from the default report file name. Comments: This causes situations when .txt is added to files of another file format	Fixed	Darius
PM86.6.1	5959	Note printing. I select a note in listing, select Print to file/ Note Contents - I get empty print preview screen, click Close - get access violation errors. Comments: To print ordinary note listing to file - do not display dialog "Print what".	Fixed	Audrius
PM86.1	5976	In Workflow listing>New Court Event de try to assign matter which has assigned one entity with judge/arbitrator role: have got a message 'Do you want to copy judge address to the Location Field' click on "Yes" or on "No" -have got access violation error.	Fixed	Saulius
PM86.1	5977	See comments. Comments: In workflow listing tries to create a new Court event (do not use template). First in Court event de>Court Event tab try to add any item from address book screen. After can see the Message:"Would you like to add the entity as a partipant" If click on "no" button have got an error:'QueryJudge:'Field 'JUDJEID' not found".	Fixed	Saulius
PM86.1	5983	Create a new entity (individual or organization): in General tab select entity type, fill last name field, click on button 'Assign Contact' and tray to assign contact-have got an error: Comments: "INSERT Statement conflicted with Column Foreign Key constraint 'ENTRELT_ENTITYID_REF'.The conflict occurred in database 'pmwin86', table	Fixed	Saulius

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		'Entities', column 'ENTITYID'."		
PM86.1	5966	Investigate the following. Comments: After Preview button is clicked in Report Settings window, display "Please wait - report is generated" modal window until Report Preview window is opened. This is needed because if there are many records, then it takes a while until Report Preview window is invoked, and during that time user can activate other controls. The same window should be added when printing to file. When listing is closed when report file is not ended to generate - access violation error occurs.	Fixed	Darius
PM86.2	5890	When during work with Pmwin I unplug network cable - PMWin closes correct, with a message, but PMWIN.exe process stays in the system, and I have to kill it in Task Manager, and only then I can restart PMWin.	Fixed	Arturas
PM86.2	5961	In Entity De> Primary Address tab> in Phone list delete all phone numbers, in Contact De the numbers are not deleted. Comments: Comments: The same problem about REVISORID, DATEREVISED in PMWIN. This bug also should be assigned to Saulius: Entinfo_General.pas unit -> btnPhoneDeleteClick procedure. QA: Rimas part is done	Fixed	Saulius
PM86.6.2	6009	In Report Settings window, change message "Please wait.. The report is being formatted for preview" to "Please wait.. The report is being formatted".	Fixed	Darius
PM86.2	6011	In Saga specific matter DE>overview tab cannot write any value in Status and Facts tabs.	Fixed	Airenas
PM86.2	6016	In Matter DE>Plaintiff>Medical tab>hit on 'New', in Medical Provider screen assign any provider item, after just delete it and press 'ok' button- have got an error:'qMedical: Field 'ISTESTIFY' not found'.	Fixed	Airenas
PM86.7.1	4374	After Creating Timeslip - Retain value from Previous Timeslip if Yes is answered to "Generate another Timeslip?" Comments: Transaction >>> KEEP value upon Generate Another Flat Rate >>> populated based on trans [so it would be kept unless a new Transaction is picked] Description >>> KEEP as long as it is replaced if any applicable fields are changed More - Phase >>> KEEP value upon Generate Another More - Document >>> KEEP value upon Generate Another QA: Flat Rate is working incorrectly (R.M.)	Fixed	Audrius

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PM87	4756	Players tab. Highlight any player and hit Edit button to modify player's address. Entity DE window appears. Change address and press Save. Entity DE window closes, but in Document DE>Players tab this address is not refreshed. Comments: Address is refreshed only when you close Document DE form and open it again.	Fixed	Erikas
PM86.7.1	5041	Retrieve a filter in Matter Listing in which is selected filtering by entity type. Apply filter - have got general sql error 'Tables 'ENTITIES' and 'ENTITIES' have the same exposed names. Use correlation names to distinguish them.' QA: I can recreate it on 8.6.6.1 (D.C.) Response: CNR - too old bug.	Fixed	Airenas
PM86.7.1	5939	Check to make sure the proper SITEID and SECURITYID are used at login. Comments: COMMENTS: When the user logs in to PM, the global SITEID should be ENTITIES.DEFAULTSITEID. The global Security Level should be the user's assignment for ENTITIES.DEFAULTSITEID. If the user has no FUNCSEC assignment for ENTITIES.DEFAULTSITEID, then an error message should appear (get this from Saulius), and PM Login screen should remain on the screen.	Fixed	Arturas
PM86.7.1	5967	Players tab. Highlight any player and hit Edit button to modify player's address. Entity DE window appears. Change address and press Save. Entity DE window closes, but in Document DE>Players tab this address is not refreshed. Comments: (Arturas) From my part the bug is fixed: added Refresh method to TAddressObject component. Erikas needs to call this method when needed.	Fixed	Erikas
PM86.7.1	6012	See Comments: Comments: In Timeslip Settings> Hourly Billing Rates tab> create the two same records (same rate type, matter, rate...) where is overlapping time period (for example - Start Date bigger than the first billing record Start Date). Have a message "RAISERROR could not locate entry for error 50001 in sysmessages". QA: Consult with Tom about text of the message. Response: There is a bug in DB	Denied, bug in PM DB	Audrius
PM86.7.1	6018	I create a document - profile only. Then I copy this document - document DE is opened, I get a message "Cannot create this directory :\", then document DE is closed, and document copy is saved with empty description. Comments: After that document listing is not automatically refreshed.	Fixed	Erikas
PM86.7.1	6020	Document Copy. When I copy a document, Description field is empty. Selecting a	Fixed	Erikas

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		type does not trigger filling of empty Description field - such functionality exists when I create a new document profile.		
PM86.7.1	6022	In entity listing filter by entity name, after filter by any letter. And after clear filter- can not see all items in entity listing. QA: Bug has to be reassigned back to Saulius. Entity listing query must have property OpenAfterFilter set to True, because query is refreshed using Close-Open but not Refresh method. -Arturas Response: Bug in DBGridPM component. Responsible Arturas.	Fixed	Saulius
PM86.7.1	6027	In new Entity DE> Contacts tab assign some contacts, after hit on "View Contact ' button- is opening Contact DE and is opening "New Entity is" screen- but can not edit this Contact DE, first must close the Entity DE. Response: 'View Contact' is disabled when Entity DE opened in modal mode.	Fixed	Saulius
PM86.7.1	6029	Document Copy - when I copy a document - profile only, Date Profiled field should not contain time.	Fixed	Erikas
PM86.7.1	6031	Validate all fields when the profile is created from a Template or Copy. Assignments that are no longer valid should not populate the fields, just like in matters.	Fixed	Erikas
PM86.7.1	6032	In Matter settings>Templates tab try to open template have got an errors:'Failed to load 'matter_default.ocx', DBEditCode:'Field 'TEMPLCODE'not found, 'Query Matter: 'Field 'TEMPLATEID' not found, access violation error. Comments: This happens when matter templateid = matterid and this matter have law type with selected matter default.	Fixed	Airenas
PM86.7.1	6065	!!! Document Profile and entity saving. When I have a document profile opened, I can not save any entity - I get access violation errors and must close PM in Task Manager. QA: For. Ex I open a document profile, then open any entity DE, edit, then save - get access violation errors.	Fixed	Erikas
PM86.7.1	6069	From entity listing delete an entity, which is selected like author in the document DE, open this document profile- have got access violation error. This document can get even after refreshing document listing. QA: This is a low priority item (Tom Foley).	Fixed	Erikas
PM86.7.1	6096	Rename Mass Mail Merge check box to "Global Address Book" in Entity Pick screens in document merge.	Fixed	Ruslan

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PM86.7.1	6112	I created a new template and boilerplate I then attempted to assign this combo as Common to all lawtypes> Error:qAssignments: Filed CMPNASSNid not found	Fixed	Ruslan
PM86.8.1	5579	Need to trap silent failures at login Comments: (Tom Foley) If the shortcut is missing either the database name or the server name, trap the current message and display the following: ERROR -- Incorrect Target in Practice Manager Shortcut! Your shortcut to Practice Manager does not include a server name and/or a database name in the Target field. The format for the Target field on the shortcut should be as follows: [full path]\PMWIN.exe /srv=[servername] /db=[databasename] For example: F:\apps\reallegal\pmwin\pmwin.exe /srv=ourserver /db=pmwindb Click OK, right click on the Practice Manager shortcut, and modify the Target field on the Shortcut tab to include the missing parameters for your firm's database. If you do not know the path, server name or database name for your firm's Practice Manager, or you continue to receive this error message, please contact your system administrator. [OK] QA: In 8.6.4.2., if I specify only server, and forget to specify DB - not user friendly error messages are displayed (D.V.) Can recreate it on 8.6.7.1.(D.C.) Response: Used different error message prepared by Tom: ERROR - Cannot connect to Practice Manager Database! There has been an error connecting the Practice Manager database. Please contact your System Administrator for assistance.	Denied	Arturas
PM86.8.1	5855	When I ceate a document - profile only, New Version button is enabled when creating or editing, and this button invokes 3 new word document windows, and error messages. List Versions button is also enabled and invokes Versions List window. QA: New Version and Versions List buttons should be disabled. In 8.6.7.1. New Version button is enabled, after clicking it - I get error msg "Invalid variant type conversion". Similar with versions list button - error msg "Data set not in edit or insert mode".	Fixed	Darius
PM86.8.1	6043	I drag a. tiff document into PM, open it, save. Then I cannot open it in PM - I get error message "Cannot open file".	Fixed	Linas
PM86.8.1	6103	User have not security function 'View Litigation: Overview General', intake wizard is enabled. Try to create specific saga matter- hit on 'new' button- matter De is opening, try to go to any tab, or just to close this matter-have got an error: Comments: 'INSERT statement conflicted with COLUMN FOREIGN KEY constraint 'LW_MATTER_MATTERID_REF'. Pmwin crashes. This error occurs when use specific saga Pmwin.	Fixed	Airenas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.8.1	6106	User does not have security function Edit Litigation: Ovrw.Neg.No Fault Submissions & Denials Layout, but he can edit Denial group box values jest after opening the matter and opening this screen.	Fixed	Airenas
PM86.8.1	6108	Remove Label Settings from Admin Menu. Comments: Label settings are currently causing too many problems to thoroughly be tested -- partially due to design, partially due to coding. Please remove the Label Setting function from the Admin menu.	Fixed	Darius
PM86.8.1	6109	New Script to Move LBLDICT values. Comments: Prepare a script that will check LBLDICT for entries. If there are any, they should be moved from LBLDICT to a new table called LBLDICT_TEMP. If there are no entries, nothing needs to be done. This should be a separate script that can be run independent of any updates.	Fixed	Darius
PM86.8.1	6123	In Matter DE>Issues tab>Issue DE>Related Entities tab assign all entities, after un-assign all, have got an error: 'The column prefix 'ISSUEID' does not match with a table name or alias name used in the query.'	Fixed	Audrius
PM86.8.2	4766	Plaintiff or Defendant tab. If there is no Entity selected as plaintiff or defendant, then New, Edit and Delete buttons have to be disabled in Contacts tab. Because now: go to this tab>New>fill out all the fields>OK>General SQL Error.	Fixed	Airenas
PM86.8.2	4848	Plaintiff (and Defendant) General tab. Contacts tab. If Matter Specific is checked, then the Contact window labels bar ends with the end of Relation column label. It should end at the corner of the screen (see Entity Specific as example)	Fixed	Airenas
PM86.8.2	5829	Document Profile DE Comments: When I select "Choose Individual Components" radio button, all the available templates and boilerplates should be loaded (according to selected Common, Law Category Specific, or Law Type Specific radio buttons), and Template and Boilerplate lookups should be independent.	Fixed	Erikas
PM86.8.2	5905	See comments Comments: In Pmwin create a document copy - do not see this document in Pcdocs. Same problem, when create a document copy in Pcdocs. The problem is that the copy, even through it creates a new document profile record in the PM database, does not fire the NewDocument publish point. If the NewDocument publish point is called, the copy function will work. This should be reassigned from Ruslan to Erikas. The publish point should be the same point fired from the other	Fixed	Erikas

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		location or we will need to edit PCDOCS to include a new subscription. (Lee)		
PM86.8.2	5978	Buttons Caption and Certificate do not appear in document profile DE when creating a document from template. They should be available in document template also.	Fixed	Erikas
PM86.8.2	6015	I open a profile, edit Comments, then click Close - I do not get any message "Are you sure you want to cancel", the profile is closed and edited comments are not saved.	Fixed	Erikas
PM86.8.2	6014	In Matter DE>Plaintiff or Defendant tabs>Parties screen assign a party and after press on 'Delete' button- there need to be a message "Do you want to remove a party from matter", because there need to have possibility for choosing.	Fixed	Airenas
PM86.8.2	6021	In entity listing >Related entities screen can assign a lot of the same items. Comments: KF: CNR for me on 8.6.7.1 but bigger problem is within matter, uncheck matter relations: related entities outside of the matter do not appear. QA: I can recreate on 8.6.7.1 (D.C.)	CNR for Ken comments. Within matter, uncheck matter relations – means show all matters relations for entity, but not concret matter relations and not all relations for this entity.	Saulius
PM86.8.2	6043	I drag a .tiff document into PM, open it, save. Then I can not open it in PM - I get error message "Cannot open file".	Fixed	Linas
PM86.8.2	6067	Priority field in Workflow DE and in Activity Templates: Comments: In Workflow De enter Priority> Save> Open this workflow, Priority field is empty. Same problem is in Workflow Settings> Activity Templates tab. Also: From main screen, Select priority, use cowboy to assign responsible, back to main screen- Priority is not saved	Fixed	Saulius
PM86.8.2	6076	In note listing find a Phone Call item, which was created on other site. From entity listing delete a user that was assigned to that Phone call. After try to open this item- have got a message : Comments: 'Can not edit Phone Call, because it does not belong to your Site', hit on 'OK', is opening FrmPhoneCall screen- try to close have got an error:'Invalid variant type conversion.' After this pmwin crashes. QA: (Tom Foley) I don't want him to fix the deletion problem, because that is all throughout PM, and it is too late to do it now. I want him to find out why PM crashes though, and maybe he can intercept whatever is causing that..	Fixed	Audrius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.8.2	6120	Groupware Settings > Assign to Law Type tab. Recommended changing ALL buttons selection as it is in Matter Settings Assign Status tab.	Fixed	Saulius
PM86.8.2	6124	In Matter DE>Overview> Court tab >Court Data entry screen fill all fields, fill Comments field. Hit on 'Add Judge' button. Hit on 'OK' button have got an error: 'Cannot insert the value NULL into column 'ROLEID'.	Fixed	Airenas
PM86.8.2	6126	In matter DE>Defendant tab> Insurance tab create a new item. Select insurance carrier and role. Hit 'OK'. After edit this item open Listing hit on 'Delete' button. After in Coverage Details tab select adjuster. Comments: Go to listing tab and hit on Add Additional Coverage button. Have got an error: 'Record was deleted by another user'. Hit on 'OK'- have got another error: 'UPDATE statement conflicted with COLUMN FOREIGN KEY constraint 'LW_MATRELTID_REF'. QA: (Tom Foley) Solution is to remove the Delete button from the D/E form. The Delete button on the listing is what will be used. Response: Delete button not removed - only action to delete parent record canceled.	Fixed	Airenas
PM86.8.2	6127	Create an entity template on for. Ex site 1, after on site 2 create an entity using this template. That entity site is site1 not site2.	Fixed	Saulius
PM86.8.2	6129	In Timeslip listing cannot delete a record which was created in other site. Same problem is in Matter DE> Timeslip tab.	Fixed	Audrius
PM86.8.2	6131	In Note listing cannot delete any record which was created in other site. Same problem is in Matter DE> Note tab; Entity DE> Note tab> Note list	Fixed	Audrius
PM86.8.2	6140	Timeslip Settings> General tab> check "Allow lower case in code". In Transactions List tab and Templates tab in code field cannot enter lower case. Response: Fixed the part that concerns Transaction Lists. Templates part left as it is because everywhere in PM you can create Templates CODE only in capitals. This is the consistency of UI.	Fixed	Audrius
PM86.8.2	6145	In Workflow listing > Workflow item DE>Linked Actions tab hit on 'Start Plan' (using right click) - have got an error: 'INSERT statement conflicted with COLUMN FOREIGN KEY constraint 'MATPLAN_MATTERID_REF'.	Fixed	Saulius
PM86.9.1	6142	n entity listing retrieve filter by any letter. After hit on 'Clear Filter'- in entity listing see items filtered by this letter .	Fixed	Saulius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.9.1	6151	Matter DE> Issue tab> Specific to this Matter column> try to filter in Grid column, have got an error: "Incorrect syntax near the keyword 'ORDER'"	Fixed	Audrius
PM86.9.1	6160	Entity DE Other Details: Modify the Gender list to only include Male and Female	Fixed	Saulius
PM86.9.2	6105	Cannot drag and drop some messages from Outlook to PmWin. Consult with Linas Comments: Make sure that multiple drag and drop is supported QA: I can recreate it on 8.6.7.1 (D.C.) Response: Fixed. Known issues - if messages will differ only in symbols from '!' to '*' (see Character Map) can be mistakes. CHARACTERS: ! " # \$ % & ' () *	Fixed. Should work 100%	Saulius
PM86.9.2	6128	Document DE - when I create a document - profile only, I cannot go to Matters and Entities tabs. Also I must click Save button twice to save it. Comments: Also when I click Timeslip, Groupware, Issues - nothing happens. The same situation when I edit a profile - only, and get a msg "Invalid variant type conversion". Response: Fixed Individual Components check box.	Fixed	Erikas
PM86.10.1	6021	In entity listing >Related entities screen can assign a lot of the same items. QA: I can recreate on 8.6.7.1 (D.C.)	Fixed	Saulius
PM86.10.1	6111	Doc Assembly: even after selecting Template and boilerplate - Generate Doc produced error of: parameter object is improperly defined QA: ok - this seems to happen when boilerplate is still highlighted (selected) and I use mouse or hot key to say generate doc.	CNR	Ruslan
PM86.10.1	6143	The drop-down lists for Law Type and Doc Type on the Assignment Screen don't have scroll bars on 800 x 600 display.	Fixed	Ruslan
PM86.10.1	6158	When I run up85to86.sql script on DB, I loose the document assembly component assignments.	Fixed	Ruslan
PM86.10.1	6161	Document Assembly Settings - Assignment tab. When I select Tree radio button, I am not able to filter needed Law Category, when there are many records. If I want to display a needed category, I have to filter it in List first, then select Tree. QA: Maybe it should be worth to display appropriate message after selecting Tree button, because now I can not see needed category even when I collapse all the categories branches.	Fixed	Ruslan
PM86.10.1	6164	1) You can save note template without description if in Note Settings> Note Template tab open existing template> delete template description> click Close> in	Fixed	Audrius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		the question "Do you want to save changes in Note Template?" click Yes. Comments: 2) Note Settings> Note Template tab> New> don't enter any value> click Close> in the question "Do you want to save changes in Note Template?" click Yes. In template listing do not see this template, but in Assign Matter Notes tab and Assign To Matter Notes can see empty template.		
PM86.10.1	6174	In Workflow listing filter for ex. 'Category' column by Task. After do clear filter and filter this column by appointment-is not filtering by it, still can see all items filtered by task. Comments: After for ex. Go to 'Description' column- there is selection by Category- can filter by task or appointment. The same is with all columns.	Fixed	Saulius
PM86.10.1	6178	Create a new database. In Matter settings> Category tab try to create a category item. Have got an error: 'Violation of PRIMARY KEY constraint 'PR_LAWCAT_3A4CA8FD'.Cannot insert duplicate key in object 'LAWCAT'. Response: Darius fixed sql script for creating new DB.	Fixed	Darius
PM86.10.1	6180	Create a new database. In specific saga matter >Staff tab hit on 'ASSIGN' button. If Assign Wizard screen is empty select a role and hit on 'Finish'. Have got an error: Comments: 'Cannot insert the value NULL into column 'ENTITYID', ..'.	Fixed	Saulius
PM86.10.1	6183	If in Address Book Settings is empty Mailing Lists tab, in Entity listing using right click hit on 'Add to mailing list'. In Assign To Mailing List screen do search by Shift +%, after is activated buttons 'Assign Selected' and 'Assign All'. Comments: Hit on one of them- have got an error: 'INSERT statement conflicted with COLUMN FOREIGN KEY constraint 'LW_ENTMAILAS_MAILINGID_REF'	Fixed	Saulius
PM86.10.1	6199	Remote Install Comments: Remote Install will not run on Windows 98 second edition. It gives you the message that it only will run on 95, 98, NT, 2000 and ME. I guess you need to indicate that it can run on 98-second edition. I have to have this because this is what all workstations are built on	Fixed	Darius
PM86.10.1	6202	In the remote install if you do not have MSSQL installed it says it detects an earlier version of MSSQL than 7 or 2000. Comments: This is minor but confusing. In the remote install if you do not have MSSQL installed it says it detects an earlier version of MSSQL than 7 or 2000. It should say it finds no version and that this is required to install remote. BTW when will we have the remote install with MSDE? This will be a main question. QA: Need to fix the "SQL Not Found" message.	Fixed	Darius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
PM86.10.1	6203	Entity Note. Comments: Error Message on SAVE in Entity Note. When an entity note is created from the Notes button on the Entity Record, then save is attempted, the error message pops up that reads: "The Note is not assigned to any matters or entities. Are you sure you want to save this note?" (Copy below.) When you click on Assigned Entities tab for the note, the entity from which you launched the note is assigned. Return to the note and attempt Save again, this time no error message.	Fixed	Audrius
PM86.10.1	6204	Double Click on Item in Expert Type list = "New" instead of "Open" Under Addressbook Settings, go to Expert Type tab. If an item exists, double click on it. Instead of opening the item you clicked on, you get a blank form to create a new item.	Fixed	Saulius
PM86.10.1	6205	Matter Listing Column Sort Error The Matter Date Opened does not allow for sorting or "wildcard" sorting and often makes errors when using queries on data in that field.	Denied	Airenas
PM86.10.1	6206	Matter Listing Column Sort Error The Matter Date Closed does not allow for sorting or "wildcard" sorting and often makes errors when using queries on data in that field.	Denied	Airenas
PM86.10.1	6207	Matter Listing Column Sort Error The Matter Status Age column will not allow selection as the Sort column for that listing.	Fixed	Airenas
PM86.10.1	6208	Entity Listing Column Name Label Error The column name in Entity Listing "Description" should be "Prefix" to correspond to that field name in the Entity Record.	Fixed	Saulius
PM86.10.1	6209	Entity Listing Column Name Label Error The column name in Entity Listing "Extension" should be "Suffix" to correspond to that field name in the Entity Record.	Fixed	Saulius
PM86.10.1	6210	Document Profile Button Name Comments: The button on the document profile named "Close Profile" is also a "Cancel Profile" and "Delete Profile w/o Saving" button. Perhaps a better name? Or one that is "Cancel w/o Saving" until it has been intentionally saved first, then it changes to "Close Profile".	Denied	Tom
PM86.10.1	6211	Document Assembly Settings Window Lacks Close Button There is no "Close" or similar button on the Document Assembly Settings screen.	Fixed	Ruslan
PM86.10.1	6212	Matter Note. Comments: Error Message on SAVE in Matter Note. When a matter note is created in matter DE, then save is attempted, the error message pops up that reads: "The Note is not assigned to any matters or entities. Are you sure you want to save this	Fixed	Audrius

Resolved in Version	PCR # or Spec	Problem Description	Resolution, Comments or Special Instructions	Name of Engineer
		note?" When you click on Assigned Matters tab for the note, the matter from which you launched the note is assigned. Return to the note and attempt Save again, this time no error message.		
PM86.10.1	6105	Can not drag and drop some messages from Outlook to PmWin. Consult with Linas Comments: Make sure that multiple drag and drop is supported Known issues - if messages will differ only in symbols ! " # \$ % & ' () * there could be errors	Fixed	Saulius

1.3. Unresolved Issues

New Items are in bold.				
Resolved in Version	PCR # or Spec	Issue	Impact or Comments	Name of Engineer
		TreeView in document templates not finished yet.	This part of functionality is not implemented yet.	Erikas
PM8.6.4.1		PM Remote is not finished completely yet.	Requires PMRemote.EXE	Aurelija
PM8.6.8.1		Implemented, fixed site securities on global listings, mater and entities related listings. Some DE forms.	Some of the lookups are still not respecting Site Securities, as well as Document De form	Airenas, Audrius, Saulius
PM8.6.8.1	6076	In note listing find a Phone Call item, which was created on other site. From entity listing delete a user that was assigned to that Phone call. After try to open this item- have got a message Comments: 'Can not edit Phone Call, because it does not belong to your Site', hit on 'OK', is opening FrmPhoneCall screen- try to close have got an error:'Invalid variant type conversion.' After this pmwin crashes.	On Hold	Audrius

1.4. Known Problems

New Items are in bold.				
Resolved in Version	PCR # or Spec	Issue	Impact or Comments	Name of Engineer
PM8.6.11.1	4063	Saga Document Assembly Settings, UDMC Clause DE Form. File name field. See Comments Comments: When edit value in that field: If no file name extension is given to file by user, system should do the following: If Word Processor is MS Word, system should add .doc as file extension. If it is WordPerfect, system should add the extension .wpd. QA: If word is the default word processor, system gives file extension ".dot" instead of ".doc" and if WordPerfect is the default word processor, it give it the extension "wpt" instead of "wpd". Tested on version 8.1.55.1	Document Assembly Design.	Ruslan
PM8.6.11.1	4898	Not implemented securities functions. Comments: Adminiter Tiffviewer settings, Change Site, Create user through NT authentication Disable intake module, Disable closing module, Edit users preferences, Export accounts, Export activities, Export client information, Import Documents from soft solution, Select & design caption, Select & design certificate, Select & edit caption, Select & edit certificate, Select caption, Select certificate, select letterhead, Timeslip listing for all users, View mass mail merge, Workflow rules from listing, Create Global Workflow, Merge entities. QA: for reference only – separate entries made		Aurelija
PM8.6.11.1	4909	Site security is not working in Note DE form > Related to Matters, Related to Entities, Related to Issues tabs.	Note Listing	Audrius
PM8.6.11.1	4910	Site security is not working in Timeslip DE> More tab in Phase and Documents fields.	Timeslip DE	Audrius
PM8.6.11.1	4953-4963	Support site security in all lookups, filters, settings, and listings.	Matter Listing Entity Listing Document Listing Document Assembly Timeslip Listing Note Listing	Airenas Saulius Audrius Erikas Ruslan

Resolved in Version	PCR # or Spec	Issue	Impact or Comments	Name of Engineer
			Issue Listing Annotation Listing Workflow Listing Groupware Listing Security Settings	
PM8.6.11.1	6200	PM Remote. Comments: Remote does not work when I click download. I get the following error and I have done everything Auri told me at least 5 times. I have re-installed pmwin remote each time because it wipes my database. This is very critical. BTW I did run the pmremote script each time 23:23:34 Login failed for user 'SA' 23:23:44 [OLE/DB provider returned message: Timeout expired]		Aurelija
PM8.6.11.1	6238	In Timeslip Settings >General tab select Billing program Legal vision. In User Preferences click on 'Generate timeslip in matter'. Open a matter , try to close it, have got a message:' Do you want to generate Timeslip'. Hit on 'Yes' . Comments: Is opening timeslip de and have got an error:'FilterQueryEntity:Filed" not found.		Audrius
PM8.6.11.1	6240	In Remote db >Matter de>Workflow listing create a new court event, create a new Judge and select it. After download this item to Local db. Can not see selected jugde item in judge field		Aurelija
PM8.6.11.1	6242	PM Remote. When I download 101 matters it does not download any assigns at all. Probably a timeout issue		Aurelija
PM8.6.11.1	6258	DB problem.		Airenas

Resolved in Version	PCR # or Spec	Issue	Impact or Comments	Name of Engineer
		<p>Comments: > sp_help sites > The table is referenced by: > pmwindb.dbo.DOCMAP: DOCMAP_LOCALSITEID_REF > pmwindb.dbo.DOCMAP: DOCMAP_SITEID_REF > pmwindb.dbo.ENTITIES: ENTITIES_DEFAULTSITEID_REF > pmwindb.dbo.FUNCSEC: FUNCSEC_SITEID_REF > pmwindb.dbo.JURISDCT: JURISDCT_SITEID_REF > pmwindb.dbo.MRULASS: MRULASS_SITEID_REF > pmwindb.dbo.SITSESEC: SITSESEC_SITEID_REF > pmwindb.dbo.SYSTEM: SYSTEM_SITEID_REF >> That is a total of 8. > Things that come to mind that one should see there: > DOCUMENT > MATTER > ENTITIES.SITEID > TIMESLIP >> and probably quite a bit more....</p> <p>QA: (Darius) Make sure that following and any other table that has field SITEID have foreign key constraint to SITES SITEID DOCMAP DOCTEMPL DOCUMENT ENTITIES ENTTEMPL FUNCSEC JURISDCT MATRULE MATTEMPL MATTER MRULASS NOTE NOTETMPL RULEPRJ RULES SITES SITESEC SYSTEM TIMEARCH TIMESLIP TIMTEMPL</p>		
PM8.6.11.1	6263	<p>Matter DE: Overview: Billing: Report/Bill To. Click New - Assign Wizard window appears. Select one Role, and "Entities On Matter" - so that the entities list would be empty. Click New - the first time you get Access Violation error.</p> <p>Comments: The second time - works ok, new entity DE is invoked.</p>		Tom
PM8.6.11.1	6264	<p>Assign Attorney/Firm or Attorney to a litigation specific matter.</p> <p>Comments: In Entities tab, click New. In Assign Wizard, select any entity. Select Role as Attorney or Attorney Firm. Click Finish - Attorney Data Entry window appears. Select field values, click OK - get error msg "Cannot insert the value NULL into column "RELATEDASSIGNID".. " The same get if assigning Plaintiff or Defendant in appropriate tabs.</p>		Tom
PM8.6.11.1	6265	<p>Groupware settings - Assign To Law Type, Assign Law Type tabs.</p> <p>Comments: For Assignment Listing windows, Report Settings windows, and Filter windows - Workflow captions are used instead of Groupware</p>		Tom

Resolved in Version	PCR # or Spec	Issue	Impact or Comments	Name of Engineer
PM8.6.11.1	6266	In Address book settings> Assign role, assign to role tabs >Listing button >Filter> hit Role drop-down List button> opens 'Choose Law Type' window. Comments: Filter must work by AND principle, like in global entity listing		Tom
PM8.6.11.1	6285	Long document names. Comments: Opening the document from listing works fine since PM does not try to change the path then. When opening a document from profile screen, Practice Manager actually moves the document to the correct location and only then tries to open it. Since PM only can deal with 8.3 file names and client utilizes long names for documents, PM only stores 8.3 aliases to the actual file names. Once PM moves the file to a new location it preserves it's long name but the 8.3 alias changes (don't ask me why - I didn't look in the source code) and since PM stores only 8.3 alias instead of full name the document is lost at that point. I suspect that to reproduce the problem one has to have at least several similar long names in the original directory		Erikas
PM8.6.11.1	6287	Document assembly with Corel Word Perfect 2000, and Word Perfect 8. Comments: When I generate a document with Corel WP, in generated document I get field codes the same as in assembly template, and not retrieved field values. According to Tom, there can be a problem that there is no made a copy of global dat file into a local Temp directory.		Ruslan
PM8.6.11.1	6288	See comments. Comments: One user is downloading a matter and at the same time another user can edit or delete this matter, after if open local db can get an error or just do not see this downloaded matter.		Aurelija
PM8.6.11.1	6294	Not storing the list of previously selected matters. These should be stored and appear in the Selected list the next time you open PMRemote Download.		Aurelija

Resolved in Version	PCR # or Spec	Issue	Impact or Comments	Name of Engineer
PM8.6.11.1	6300	In Groupware listing activate 'Subject ' column and do search by it . After delete one groupware item and try to activate another column or just delete searching- search is still active.		Tom
PM8.6.11.1	6330	DB problem. Comments: > sp_help sites > The table is referenced by: > pmwindb.dbo.DOCMAP: DOCMAP_LOCALSITEID_REF > pmwindb.dbo.DOCMAP: DOCMAP_SITEID_REF > pmwindb.dbo.ENTITIES: ENTITIES_DEFAULTSITEID_REF > pmwindb.dbo.FUNCSEC: FUNCSEC_SITEID_REF > pmwindb.dbo.JURISDCT: JURISDCT_SITEID_REF > pmwindb.dbo.MRULASS: MRULASS_SITEID_REF > pmwindb.dbo.SITESEC: SITESEC_SITEID_REF > pmwindb.dbo.SYSTEM: SYSTEM_SITEID_REF > > That is a total of 8. > Things that come to mind that one should see there: > DOCUMENT > MATTER > ENTITIES.SITEID > TIMESLIP > > and probably quite a bit more.... QA: (Darius) make sure that following and any other table that has field SITEID have foreign key constraint to SITES SITEID DOCMAP DOCTEMPL DOCUMENT ENTITIES ENTTEMPL FUNCSEC JURISDCT MATRULE MATTEMPL MATTER MRULASS NOTE NOTETMPL RULEPRJ RULES SITES SITESEC SYSTEM TIMEARCH TIMESLIP TIMTEMPL		Saulius
PM8.6.11.1	6331	DB problem. Comments: > sp_help sites > The table is referenced by: > pmwindb.dbo.DOCMAP: DOCMAP_LOCALSITEID_REF > pmwindb.dbo.DOCMAP: DOCMAP_SITEID_REF > pmwindb.dbo.ENTITIES: ENTITIES_DEFAULTSITEID_REF > pmwindb.dbo.FUNCSEC: FUNCSEC_SITEID_REF > pmwindb.dbo.JURISDCT: JURISDCT_SITEID_REF > pmwindb.dbo.MRULASS: MRULASS_SITEID_REF > pmwindb.dbo.SITESEC: SITESEC_SITEID_REF > pmwindb.dbo.SYSTEM: SYSTEM_SITEID_REF > > That is a total of 8. > Things that come to mind that one should see there: > DOCUMENT > MATTER > ENTITIES.SITEID > TIMESLIP > > and probably quite a bit more.... QA: (Darius) make sure that following and any other table that has field SITEID have foreign key constraint to SITES SITEID DOCMAP DOCTEMPL DOCUMENT ENTITIES ENTTEMPL FUNCSEC JURISDCT MATRULE MATTEMPL MATTER MRULASS NOTE NOTETMPL RULEPRJ RULES SITES SITESEC SYSTEM TIMEARCH TIMESLIP TIMTEMPL		Erikas

Resolved in Version	PCR # or Spec	Issue	Impact or Comments	Name of Engineer
PM8.6.11.1	6332	<p>DB problem.</p> <p>Comments: > sp_help sites > The table is referenced by: > pmwindb.dbo.DOCMAP: DOCMAP_LOCALSITEID_REF > pmwindb.dbo.DOCMAP: DOCMAP_SITEID_REF > pmwindb.dbo.ENTITIES: ENTITIES_DEFAULTSITEID_REF > pmwindb.dbo.FUNCSEC: FUNCSEC_SITEID_REF > pmwindb.dbo.JURISDCT: JURISDCT_SITEID_REF > pmwindb.dbo.MRULASS: MRULASS_SITEID_REF > pmwindb.dbo.SITESEC: SITESEC_SITEID_REF > pmwindb.dbo.SYSTEM: SYSTEM_SITEID_REF > > That is a total of 8. > Things that come to mind that one should see there: > DOCUMENT > MATTER > ENTITIES.SITEID > TIMESLIP > > and probably quite a bit more....</p> <p>QA: (Darius) make sure that following and any other table that has field SITEID have foreign key constraint to SITES SITEID DOCMAP DOCTEMPL DOCUMENT ENTITIES ENTTEMPL FUNCSEC JURISDCT MATRULE MATTEMPL MATTER MRULASS NOTE NOTETMPL RULEPRJ RULES SITES SITESEC SYSTEM TIMEARCH TIMESLIP TIMTEMPL</p>		Audrius
PM8.6.11.1	6338	<p>Imageview documents problem.</p> <p>Comments: When the document is created and is based on IMGVIEW, the publish points we are subscribing to for Create is not firing, therefore the filename cannot be altered. Is there already a publish point that deals with ImgView/Drag&Drop? If not, we need a publish point, it should pass filename and extract the new filename from the XML result, just as we do on CreateDocument</p>		Tom
PM8.6.11.1	6339	<p>Create a new database. Drag a message from Outlook in to PM, open the imported message, hit view or edit buttons - nothing happens</p>		Tom
PM8.6.11.1	6340	<p>Document listing problem.</p> <p>Comments: 1. Situation first (I have 2 documents on the list, first has app WORD2000, second has app Tiff Viewer): 1.1. Go to profile of Tiff document 1.2. Cancel profile 1.3. Hit Open (selected document is the first on the list, that has</p>		Erikas

Resolved in Version	PCR # or Spec	Issue	Impact or Comments	Name of Engineer
		WORD2000 app assigned) nothing happens. 1.4. Double click on that document - nothing happens. 2. Situation second (same conditions): 2.1. Repeat step 1.1, 1.2. 2.3. Select Document (that has application Tiff/Img Viewer assigned) hit open. It opens OK. 2.4. Close Tiff Viewer. 2.5. Hit open again - Nothing happens. Double click works no matter how many times you open/close app		

1.5. Supporting Documentation

Main Folder [\\Dfi-pdc\ftp\ftp\reallegal\pm86](ftp://reallegal/pm86)

New Items are in bold.

Document Name	Location	Comments	Prepared By	Date
Practice Manager Integration Engine. Technical Design Specification for Integration Engine	\\Dfi-pdc\ftp\ftp\pmti\dev\andes\IntegrationEngine\Version1.0\law.integrationengine.tds.doc		Lee Childs	March 15, 2001
Practice Manager Integration Engine Data Model	\\Dfi-pdc\ftp\ftp\pmti\dev\andes\IntegrationEngine\Version1.0\Law.IntegrationEngine.DataModel.vsd		Lee Childs	March 19, 2001
Practice Manager Functional Requirements Specifications		TBD		
Practice Manager Technical Design Specifications		TBD		
Practice Manager PM Remote FDS	\\Dfi-pdc\ftp\ftp\pmti\dev\andes\tupungato\specs\pm.remote	Functional design specifications document on PM Remote functionality		April 21, 2001
Practice Manager 8.6 Administrator's Guide	\\Dfi-pdc\ftp\ftp\reallegal\pm86\knowledgebase>manuals\pm.ag.pdf			06/15/2001
Practice Manager 8.6 Release Notes	\\Dfi-pdc\ftp\ftp\reallegal\pm86\knowledgebase>manuals\pm.rn.pdf			06/15/2001
Practice Manager 8.6 User Guide	\\Dfi-pdc\ftp\ftp\reallegal\pm86\knowledgebase>manuals\pm.ug.pdf			06/15/2001

Document Name	Location	Comments	Prepared By	Date
	pdclftp\ftp\reallegal\pm86\knowledgebase\manuals\pm.ug.pdf			
Practice Manager 8.6 Getting Started Guide	\\Dfi-pdclftp\ftp\reallegal\pm86\knowledgebase\manuals\pm.gs.pdf			06/15/2001
Practice Manager 8.6 Network Installation	\\Dfi-pdclftp\ftp\reallegal\pm86\knowledgebase\manuals\pm.install.network.pdf			06/15/2001
Practice Manager 8.6 Remote User Guide	\\Dfi-pdclftp\ftp\reallegal\pm86\knowledgebase\manuals\pmremote.ug.pdf			06/15/2001
Practice Manager 8.6 Outlook Integration Guide	\\Dfi-pdclftp\ftp\reallegal\pm86\knowledgebase\manuals\pm.outlook.int.pdf			06/15/2001

2. Dependencies

2.1. Server

2.1.1. Hardware Requirements and Configuration

More Information is available from: http://www.reallegal.com/PM_CS_Sysreq.asp

Item	Minimum Requirement	Configuration
Server PC	Pentium III 550 MHz	RAM 1GB, CD-ROM drive, HDD 250MB free minimum.
Controllers	Use 2 controllers	<p>One for OS and Page file partitions</p> <p>Second for MS SQL, TEMP DB and LOG file</p> <p>Look for controllers that support a minimum of 100MB/second transfer times</p> <p>Maximum Cache on Controllers helps with speed</p>
Drive Configuration	Use Mirror, not RAID-5 as it is fastest fault tolerance	<ul style="list-style-type: none"> • Partition for the OS • Partition for the Page file (Size of this partition should be based on RAM + 12MB. So if you have a 1GB of RAM set your page file partition to 1,012MB) do not configure the server to put the page file on the OS or MSSQL volume as it can effect the requests made to drives on that partition • Partition for MSSQL and the Database • Partition for the TEMPDB

Item	Minimum Requirement	Configuration
Memory	<p>1. If you are expecting around 50,000 matters, 100,000 entities, 100,000 documents and 100,000 workflow you will have a database around 1GB. Use PMFiller© to create a simulation database if you need to predict what database size you are going to have and simulate the speed. With this configuration you need to start with 1GB of RAM. It is pretty safe to match RAM to database size.</p> <p>2. Make sure your server can grow with RAM and is not limited to 1GB if you are expecting a database to be bigger than 1GB – also remember with NT there is a current 4GB RAM threshold.</p>	<ul style="list-style-type: none"> Partition for the Log file (Not necessary all the time)
Processors and cache	<p>1 x 550MHz - 1GHz processor if database < 1GB and users < 50</p> <p>2 x 600MHz - 1GHz processor if database < 2GB or users > 50 and < 200</p> <p>4 x 800MHz - 1GHz processor if database > 3GB and users > 200</p> <p>If you are expecting your database to grow beyond 1GB in size it helps to have dual processors. Make sure your server will be able to accommodate this. Cache on the processor also helps. If you are expecting a database bigger than 1GB then do not limit your cache to 512K. Let it accommodate up to 1024K</p>	

2.1.2. Operating System Requirements and Configuration

2.1.2.1. Windows 2000

Item	Requirement	Configuration
Windows 2000 Professional Server	<ul style="list-style-type: none"> Windows 2000 server (Advanced Server optional) Build 2195 Service Pack 1 	Standard configuration

2.1.2.2. Windows NT4

Item	Requirement	Configuration
Windows NT4 Server	<ul style="list-style-type: none"> Windows NT4 Server Service Pack 6 	Standard configuration

2.1.3. Third Party Software Requirements and Configuration

2.1.3.1.

Item	Requirement	Configuration
MS SQL Server	Microsoft SQL 7 Service Pack 3 Or Microsoft SQL 2000 Standard Edition v.8.00.194 (Enterprise Edition optional)	Standard configuration; TCP/IP support is enabled There is a compatibility problem with running Microsoft SQL 2000 Client Drivers with BDE. We need to make sure are also not a problem with ADO. It happens when trying to use the 8.x NTWDBLIB drivers and trying to run with SQL with NT authentication, Named Instances of Clustering.
IIS Server	IIS version 5+ MDAC 2.6 RTM (2.60.6526.3) MSXML Parser 3.0	Due to issues with clustering, MDAC 2.6 RTM is currently NOT supported on SQL 7.0 or SQL 6.5 Clustered Servers.
PMWIN Database	Required	Upgraded up to 8.6.x version

2.2. Client Machine

2.2.1. Hardware Requirements and Configuration

Item	Requirement	Configuration
Intel architecture based PC.	Pentium II – Pentium III	RAM 128MB, HDD 1GB, and Network card. Standard configuration with network through TCP/IP enabled.

2.2.2. Operating Systems Requirements and Configuration

2.2.2.1. Windows 95/98

Item	Requirement	Configuration
Internet Explorer	Internet Explorer 4.0 plus Service Pack 1 or above required for MS SQL client installation	
Networking	TCP/IP network protocol required	TCP/IP network protocol enabled

2.2.2.2. Windows NT4

Item	Requirement	Configuration
Windows NT4 Workstation	Service Pack 1 required	Standard configuration.
Internet Explorer	Internet Explorer 4.0 plus Service Pack 1 or above required for MS SQL client installation	
Networking	TCP/IP network protocol required	TCP/IP network protocol enabled

2.2.2.3. Windows 2000

Item	Requirement	Configuration
Windows 2000 Professional Workstation	Service Pack 1 required	Standard configuration.
Internet Explorer	Internet Explorer 4.0 plus Service Pack 1 or above required for MS SQL client installation	
Networking	TCP/IP network protocol required	TCP/IP network protocol enabled

2.2.3. Third Party Software Requirements and Configuration

2.2.3.1. [MS SQL]

Item	Requirement	Configuration
MS SQL	MS SQL 7 version or above required plus Service Pack 3	Connection to server using TCP/IP network protocol
MDAC 2.6	Microsoft Data Access Components	Due to issues with clustering, MDAC 2.6 RTM is currently NOT supported on SQL 7.0 or SQL 6.5 Clustered Servers.

2.2.4. Supported Third Party Software

2.2.4.1. Supported Groupware

Item	Requirement	Configuration
GroupWise 5.2		
GroupWise 5.5		
Outlook 95		
Outlook 97		
Outlook 2000		

2.2.4.2. Supported Utilities

Item	Requirement	Configuration
GroupWise 5.2		
Paperport 5.x and higher		
TextBridge Pro 97 and higher		
Zyindex 98		
Imagecontrols 2		

2.2.4.3. Supported Accounting software

Item	Requirement	Configuration
Quickbooks		
Tabs		
Juris		
LegalVision		
Timeslips		
Elite		
CMS		

2.2.4.4. Supported Word Processing software

Item	Requirement	Configuration
Wordperfect 7.0		
Wordperfect 8.0		
Wordperfect 9.0		
MSWord 9x		
MSWord 2000		
HotDocs 5.1		
Corel 8		
Corel 2000		

3. Components

3.1. Scripts

New Items are in bold.

Component	Description	Version	Path/File name	File size	Timestamp
New86.SQL	This script creates database tables, fills them with some meta data	8.6.11.1	VSS:\$/PmWin 86/SQL/MSSQL	781,421 bytes	06/07/2001 6:31 pm
Up85to86.SQL	Database upgrade from 85 versions to latest version of 86 with all UPVERS included.	8.6.11.1	VSS:\$/PmWin 86/SQL/MSSQL	115,904 bytes	06/07/2001 6:10 pm
Up001.SQL	UPVER 001	8.6.10.1	VSS:\$/PmWin 86/SQL/MSSQL	36,424 bytes	05/31/2001 9:29 am
Up002.SQL	UPVER 002	8.6.3.1	VSS:\$/PmWin 86/SQL/MSSQL	7,231 bytes	04/21/2001 7:29 pm
Up003.SQL	UPVER 003	8.6.3.1	VSS:\$/PmWin 86/SQL/MSSQL	10,307 bytes	04/21/2001 7:29 pm
Up004.SQL	UPVER 004	8.6.4.1	VSS:\$/PmWin 86/SQL/MSSQL	18,285 bytes	06/01/2001 5:44 am
Up005.SQL	UPVER 005	8.6.5.1	VSS:\$/PmWin 86/SQL/MSSQL	3,861 bytes	05/01/2001 10:01 am
Up006.SQL	UPVER 006	8.6.6.1	VSS:\$/PmWin 86/SQL/MSSQL	2,626 bytes	05/14/2001 1:51 pm
Up007.SQL	UPVER 007	8.6.7.1	VSS:\$/PmWin 86/SQL/MSSQL	513 bytes	05/21/2001 9:58 pm
Up008.SQL	UPVER 008	8.6.8.1	VSS:\$/PmWin 86/SQL/MSSQL	1,236 bytes	05/23/2001 12:35 am
Up009.SQL	UPVER 009	8.6.9.1	VSS:\$/PmWin	685 bytes	05/29/2001 8:47 am

Component	Description	Version	Path/Filename	File size	Timestamp
			86/SQL/MSSQL		
Up010.SQL	UPVER 010	8.6.10.1	VSS:\$/PmWin 86/SQL/MSSQL	1,536 bytes	06/01/2001 5:45 pm
Up011.SQL	UPVER 011	8.6.11.1	VSS:\$/PmWin 86/SQL/MSSQL	33,379 bytes	06/07/2001 5:57 pm

3.2. Executables

New Items are in bold.

Component	Description	Version	Path/Filename	File size	Timestamp
PMWin.Exe	Practice Manager application with ADO support and Publisher implementation	8.6.1.1		10,302,464 bytes	03/30/2001 8:33 pm
P86.1.1.exe	Practice Manager self-extracting archive	8.6.1.1	VSS:\$/PmWin86/Bin/EXE/ P86.1.1.exe	3,150,848 bytes	03/30/2001 8:53 pm
PMWin.Exe	Practice Manager minor build from 8.6.1.2 additional problems resolved.	8.6.1.2		10,301,440 bytes	04/06/2001 9:16 am
P86.1.2.exe	Practice Manager minor build from 8.6.1.2 additional problems resolved. Self-extracting archive.	8.6.1.2	VSS:\$/PmWin86/Bin/EXE/P 86.1.2.exe	3,151,871 bytes	04/06/2001 9:35 am
PMWin.Exe	Practice Manager minor build from 8.6.1.3 additional problems resolved.	8.6.1.3		10,373,120 bytes	04/09/2001 9:30 pm
P86.1.3.exe	Practice Manager minor build from 8.6.1.3 additional problems resolved. Self-extracting archive.	8.6.1.3	VSS:\$/PmWin86/Bin/EXE/P 86.1.3.exe	3,165,696 bytes	04/09/2001 9:34 pm
PMWin.Exe	Practice Manager minor build from 8.6.1.4 additional	8.6.1.4		10,334,720 bytes	04/12/2001 9:29 am

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Component	Description	Version	Path/Filename	File size	Timestamp
	problems resolved.				
P86.1.4.exe	Practice Manager minor build from 8.6.1.4 additional problems resolved. Self-extracting archive.	8.6.1.4	VSS:\$/PmWin86/Bin/EXE/P86.1.4.exe	3,165,696 bytes	04/12/2001 9:43 am
PMWin.Exe	Practice Manager major build from 8.6.2.1 additional problems resolved.	8.6.2.1		10,330,112 bytes	04/17/2001 7:59 pm
P86.2.1.exe	Practice Manager major build from 8.6.2.1 additional problems resolved. Self-extracting archive.	8.6.2.1	VSS:\$/PmWin86/Bin/EXE/P86.2.1.exe	3,165,696 bytes	04/17/2001 8:07 pm
PMWin.Exe	Practice Manager minor build 8.6.3.1 additional problems resolved.	8.6.3.1		10,337,792 bytes	04/21/2001 7:46 pm
P86.3.1.exe	Practice Manager minor build 8.6.3.1 additional problems resolved. Self-extracting archive.	8.6.3.1	VSS:\$/PmWin86/Bin/EXE/P86.3.1.exe	3,153,633 bytes	04/21/2001 7:37 pm
PMWin.Exe	Practice Manager major build 8.6.4.1 additional problems resolved.	8.6.4.1		9,618,432 bytes	05/01/2001 9:52 am
P86.4.1.exe	Practice Manager major build 8.6.4.1 additional problems resolved. Self-extracting archive.	8.6.4.1	VSS:\$/PmWin86/Bin/EXE/P86.4.1.exe	3,091,213 bytes	05/01/2001 9:54 am
PMWin.Exe	Practice Manager minor build 8.6.4.2 additional problems resolved.	8.6.4.2		9,618,944 bytes	05/01/2001 8:49 pm
P86.4.2.exe	Practice Manager minor build 8.6.4.2 additional problems resolved.	8.6.4.2	VSS:\$/PmWin86/Bin/EXE/P86.4.2.exe	3,091,445 bytes	05/01/2001 8:54 pm

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Component	Description	Version	Path/Filename	File size	Timestamp
PMWin.Exe	Practice Manager major build 8.6.5.1 additional problems resolved.	8.6.5.1		9,828,888 bytes	05/07/2001 10:05 am
P86.5.1.exe	Practice Manager major build 8.6.5.1 additional problems resolved.	8.6.5.1	VSS:\$/PmWin86/Bin/EXE/P86.5.1.exe	3,133,676 bytes	05/07/2001 10:20 am
PMWin.Exe	Practice Manager minor build 8.6.5.3 additional problems resolved.	8.6.5.3		9,855,488 bytes	05/11/2001 9:37 am
P86.5.3.exe	Practice Manager minor build 8.6.5.3 additional problems resolved.	8.6.5.3	VSS:\$/PmWin86/Bin/EXE/P86.5.3.exe	3,136,628 bytes	05/11/2001 11:40 am
PMWin.Exe	Practice Manager major build 8.6.6.1 additional problems resolved.	8.6.6.1		9,895,936 bytes	05/15/2001 9:20 am
P86.6.1.exe	Practice Manager major build 8.6.6.1 additional problems resolved.	8.6.6.1	VSS:\$/PmWin86/Bin/EXE/P86.6.1.exe	3,147,189 bytes	05/15/2001 9:23 am
PMWin.Exe	Practice Manager minor build 8.6.6.2 additional problems resolved.	8.6.6.2		9,897,984 bytes	05/15/2001 10:08 pm
P86.6.2.exe	Practice Manager minor build 8.6.6.2 additional problems resolved.	8.6.6.2	VSS:\$/PmWin86/Bin/EXE/P86.6.2.exe	3,147,510 bytes	05/15/2001 10:10 pm
PMWin.Exe	Practice Manager major build 8.6.7.1 additional problems resolved.	8.6.7.1		10,258,944 bytes	05/21/2001 10:44 pm
P86.7.1.exe	Practice Manager major build 8.6.7.1 additional problems resolved.	8.6.7.1	VSS:\$/PmWin86/Bin/EXE/P86.7.1.exe	3,183,097 bytes	05/21/2001 10:45 pm
PMWin.Exe	Practice Manager major build 8.6.8.1 additional	8.6.8.1		10,253,824 bytes	05/23/2001 12:54 am

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Component	Description	Version	Path/Filename	File size	Timestamp
	problems resolved.				
P86.8.1.exe	Practice Manager major build 8.6.8.1 additional problems resolved.	8.6.8.1	VSS:\$/PmWin86/Bin/EXE/P86.8.1.exe	3,187,472 bytes	05/23/2001 12:55 pm
PMWin.Exe	Practice Manager minor build 8.6.8.2 additional problems resolved.	8.6.8.2		10,260,480 bytes	05/28/2001 10:23 am
P86.8.2.exe	Practice Manager minor build 8.6.8.2 additional problems resolved.	8.6.8.2	VSS:\$/PmWin86/Bin/EXE/P86.8.2.exe	3,189,479 bytes	05/28/2001 10:28 am
PMWin.Exe	Practice Manager major build 8.6.9.1 additional problems resolved.	8.6.9.1		10,260,480 bytes	05/28/2001 9:05 am
P86.9.1.exe	Practice Manager major build 8.6.9.1 additional problems resolved.	8.6.9.1	VSS:\$/PmWin86/Bin/EXE/P86.9.1.exe	3,189,455 bytes	05/29/2001 9:09 am
PMWin.Exe	Practice Manager minor build 8.6.9.2 additional problems resolved.	8.6.9.2		10,265,600 bytes	05/29/2001 11:45 pm
P86.9.2.exe	Practice Manager minor build 8.6.9.2 additional problems resolved.	8.6.9.2	VSS:\$/PmWin86/Bin/EXE/P86.10.1.exe	3,190,675 bytes	05/29/2001 11:53 pm
PMWin.Exe	Practice Manager major build 8.6.10.1 additional problems resolved.	8.6.10.1		10,280,448 bytes	06/01/2001 6:11 pm
P86.10.1.exe	Practice Manager major build 8.6.10.1 additional problems resolved.	8.6.10.1	VSS:\$/PmWin86/Bin/EXE/P86.10.1.exe	3,192,402 bytes	05/29/2001 6:13 pm
PMWin.Exe	Practice Manager major build 8.6.11.1 additional problems resolved.	8.6.11.1		10,280,448 bytes	06/01/2001 6:11 pm
P86.11.1.exe	Practice Manager major	8.6.11.1		3,192,402 bytes	05/29/2001 6:13 pm

Component	Description	Version	Path/Filename	File size	Timestamp
	build 8.6.11.1 additional problems resolved.		VSS:\$/PmWin86/Bin/EXE/P86.11.1.exe		

3.3. Other Required Files

Dynamic Link Libraries

New Items are in bold.

Component	Description	Version	Path/Filename	File size	Timestamp
Sft Tree/VCL library	SftTree/VCL is a VCL-style control for the Windows operating system offering multi-line, multi-column, hierarchical data displays.	4.02	VSS:\$/PMWIN86/BIN/EXE/SFTTV32.DLL	232,960 bytes	03/13/2001 9:06 am

3.3.2. Registry Keys

Practice Manager 8.6 registry directories and keys.

Full path and file name (C:\PMT\PM86\PMWin.exe) is given as an example.

PmW.LoginInfo

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{028BA2C1-595A-11D2-A8B0-00AA0048FBBC}]
```

```
@=""
```

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{028BA2C1-595A-11D2-A8B0-00AA0048FBBC}\LocalServer32]
```

```
@="C:\PMT\PM86\PMWin.exe"
```

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.LoginInfo]
```

```
@=""
```

PmW.DocProfile

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{0867288B-2A9F-11D1-B504-0020AF9FDDFE}]

@="DocProfileObject"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{0867288B-2A9F-11D1-B504-0020AF9FDDFE}\LocalServer32]

@="C:\PMT\PM86\PMWin.exe"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.DocProfile]

@="DocProfileObject"

Drag and Drop

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{0BC84D00-507F-11D1-B504-0020AF9FDDFE}\LocalServer32]

@="C:\PMT\PM86\PMWin.exe"

PmW.Queries

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{2DA8BD62-1D41-11D4-A710-00C04F50A520}]

@=""

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{2DA8BD62-1D41-11D4-A710-00C04F50A520}\LocalServer32]

@="C:\PMT\PM86\PMWin.exe"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.Queries]

@=""

PmW.Options

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{3619E847-6DE3-11D4-B32C-00002120881E}]

@=""

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{3619E847-6DE3-11D4-B32C-00002120881E}\LocalServer32]

@="C:\PMT\PM86\PMWin.exe"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.Options]

@=""

PmW.SimpleEntity

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{42CD6363-1601-11D4-BAE7-00C0DF24884B}]

@=""

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{42CD6363-1601-11D4-BAE7-00C0DF24884B}\LocalServer32]

@="C:\PMT\PM86\PMWin.exe"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.SimpleEntity]

@=""

PmW.Global

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{51F6E548-2D4C-11D4-9509-00A024D17726}]

@=""

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{51F6E548-2D4C-11D4-9509-00A024D17726}\LocalServer32]

@="C:\PMT\PM86\PMWin.exe"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.Global]

@=""

PmW.Assembling

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{857B0822-09CF-11D4-A710-00C04F50A520}]

@="AssemblingObject"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{857B0822-09CF-11D4-A710-00C04F50A520}\LocalServer32]

@="C:\PMT\PM86\PMWin.exe"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.Assembling]

@="AssemblingObject"

PmW.Workflow

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{9741A6E1-7E3E-11D2-81F9-0080C73026B9}]

@=""

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{9741A6E1-7E3E-11D2-81F9-0080C73026B9}\LocalServer32]

@="C:\PMT\PM86\PMWin.exe"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.Workflow]

@=""

PmW.Matter

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{C0C7BF83-C264-11D2-81FB-0080C73026B9}]

@=""

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{C0C7BF83-C264-11D2-81FB-0080C73026B9}\LocalServer32]

@="C:\PMT\PM86\PMWin.exe"

[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.Matter]

@=""

PmW.Timeslips

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{DCC99F83-C8FE-11D3-BDDB-00C0DF25F37D}]
@=""
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{DCC99F83-C8FE-11D3-BDDB-00C0DF25F37D}\LocalServer32]
@="C:\PMT\PM86\PMWin.exe"
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.Timeslip]
@=""
```

PmW.EntityInfo

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{F584E9C1-321B-11D2-A0F7-00A024D17726}]
@=""
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID{F584E9C1-321B-11D2-A0F7-00A024D17726}\LocalServer32]
@="C:\PMT\PM86\PMWin.exe"
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\PmW.EntityInfo]
@=""
```

PmW

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\TypeLib{08672889-2A9F-11D1-B504-0020AF9FDDFE}\1.0\win32]
@="C:\PMT\PM86\PMWin.exe"
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\TypeLib{08672889-2A9F-11D1-B504-0020AF9FDDFE}\1.0\HELPDIR]
@="C:\PMT\PM86\"
```

3.3.3. Practice Manager command line keys

Some of these parameters must be used in combination, others separately. For example parameters /SRV and /DB should be used together as they provide information about location of data. /UDL parameter is alternative way of connecting to the database and can

be used instead of /SRV and /DB parameters. Either first two or /UDL key must be present otherwise Practice Manager application will not start.

New Items are in bold.

Key	Value	Comments
/SRV=	<Server name>	Server name where database resides
/DB=	<Database name>	MS SQL database name on server
/UDL=	<Full path/file name to UDL file>	This is the configuration file for OLE database connectivity. It includes database name, Server name and can be used instead first two parameters. UDL file example is located in: VSS:\$/PMWIN86/BIN/PMWIN.UDL. Main parameters that should be altered in order to configure it to correct server/database: Initial Catalog=<database name>; Data Source=<server name where database resides>; Other parameters can be left unchanged.
/R	N/A	Enables special menu for accessing remote matters database
/M	N/A	Enables to launch multiple instances of PmWin
/SAGA	N/A	Enables SAGA functionality. When you create matter with this setting on in PmWin, it will open SAGA specific matter form.
/L	N/A	Disables splash screens in Login and About windows

4. Installation Instructions

4.1. Server Installation

- [\\DFI-PDC\FTP\ftp\reallegal\pm86\installs\network](ftp://reallegal/pm86/installs/network)
- [\\DFI-PDC\FTP\ftp\reallegal\pm86\knowledgebase>manuals\pm.install.network.pdf](ftp://reallegal/pm86/knowledgebase/manuals/pm.install.network.pdf)

4.2. Server Back out Procedures

- <\\DFI-PDC\ftp\ftp\reallegal\pm86\knowledgebase\manuals\pm.install.network.pdf>

4.3. Client Installation

- <\\DFI-PDC\ftp\ftp\reallegal\pm86\knowledgebase\manuals\pm.install.workstation.pdf>
- <\\DFI-PDC\FTP\ftp\reallegal\pm86\knowledgebase\manuals\pmremote.ug.pdf>

4.4. Client Back out Procedures

- <\\DFI-PDC\ftp\ftp\reallegal\pm86\knowledgebase\manuals\pm.install.workstation.pdf>

5. Conversion Considerations

5.1. 8.0

An 8.0 Database must be version 75 (8.0.75). If it is not, the appropriate scripts must be run in order to bring the Database to 8.0.75.

The database must then be converted to 85 compatability. Use 80to85.sql

Once the database in converted to 85 follow the instructions below to convert from 85 to 86

Note: DB version/SSDataset version must be 8.0.75/8.5.62

(Select SN, SSDATASET from SETTINGS)

5.2. 8.5

The 85 Database must be 8.5.62 (SSDATSET 8.5.62)

If not, run appropriate upver scripts in order to bring database to this level.

First perform a complete backup of the database.

Run 85to86.sql on the database.