

RELEASE NOTES



Workpaper Management

Version 2.6

Author

Created and Published by Reckon Limited
Level 7, 65 Berry Street
North Sydney NSW 2060
Australia
ACN 003 348 730
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Introduction

This release offers enhancements and corrections to Workpaper Management (WM). This document includes items covering updates since the Workpaper Management 2.5.1 release.

The following convention is used throughout the document:

- ★ Enhancement
- ✓ Correction

Known Issues

A Knowledge Base article has been created to detail any new known issues as a result of this release. Knowledge Base article #19260.

The known issues are detailed separately in the Knowledge Base article, linked to the knowledge article #19260. For each 'FIXED' article the linked Knowledge Base article will contain details on how to obtain the update. For each 'LOGGED' article, the issue has been logged for development and will be resolved in a future release.

To review the Knowledge Base Article #19260, visit the MyAPS Portal, enter the article number and press the search button.

MyAPS Portal - http://myaps.aps-advance.com/vsm_prod/ServiceManager.aspx?lite

Enhancements and Corrections

Project Manager

Project Creation

- ✓ #24480. When adding a XPA project, the period end date included the time the project was created. The time has been removed so any date calculations in Excel that use the date will not include a part day for the hours.

Project Teams

- ✓ #18643. Under certain circumstances adding the first XPA Project would not display the Team security form

Project Status

- ✓ #24539. Change projects that have Team security applied and are at the Closed/Locked (final project status) to mark the Project as Read Only, previously the Team security roles were applied.

Project Rollover

- ✓ #24420, 24484, 24483. When Project Work Items existing in the second level or lower of the Project hierarchy are deleted or repositioned, sometimes rolling the project with 'Project and Template' option places these Work Items at the bottom of the Project. Rollover is now corrected to relatively position these Work Items to the related templates and levels. For Projects created in versions prior to WM 2.5, make a best effort to link existing Template Work Items to the Project Template. As sub templates are added to projects their Template IDs are assigned.
- ✓ #24344. Rolling Project crashed when there were more attachments than Work Items in the Project.
- ✓ #24540. Where a Project is attached to a Matter (or XPA Project attached to a Matter) continue Project Rollover if there is an error with the standard matter.

Excel Integration

- ✓ #24481. When the Excel APS sheet update option is set to 'Prompt' the user, under some circumstances there were 2 prompts to update the APS sheet, this has been corrected.
- ✓ #24498. Change the way WM interacts with Excel due to Office security updates to ensure Excel does not crash when WM inserts or updates Excel data

Project Team Security

- ★ There has been a functional change to 'Project Teams' with this release of Workpaper Management. Teams will now be referenced by the project. Each time a project is opened, the Project Team members and associated roles will be dynamically applied based on the Teams current members and their roles.

Refer appendix 3

IManage

- ★ #24489. Add a new menu option in Workpapers Project Level to 'Check In' all 'Checked Out' documents by the same user.

Refer appendix 1

- ★ #24488. Where PDF allows 'Checking Out' documents in Workpaper Setup. A new 'View File' menu option is added to an 'Editable' Project Work Item PDF attachment.

PDF attachment will default open in 'Read Only' mode, unless the user selects 'Open File' from Project Work Item menu.

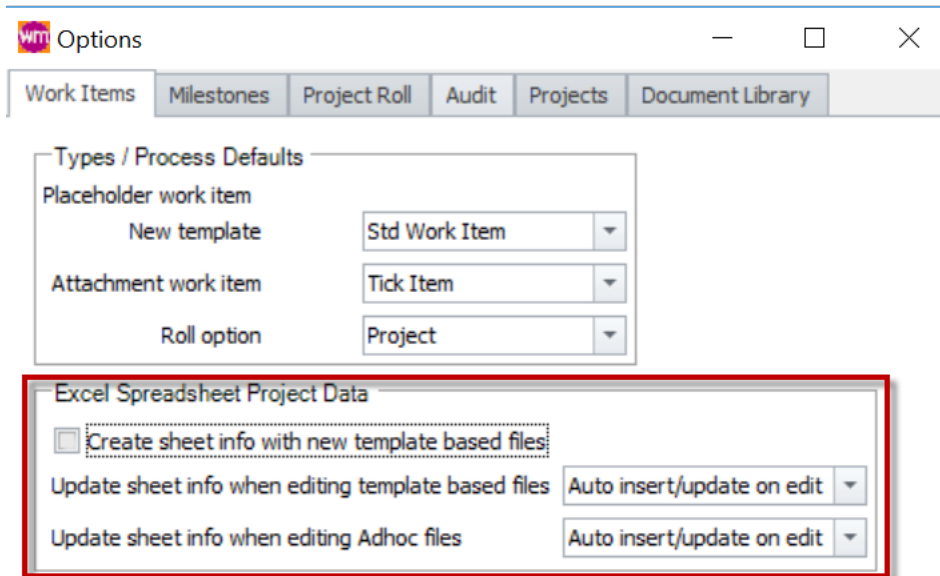
Refer appendix 2

- ★ #24503. Extensions to support ADFS authentication for iManage 10
- ★ #24355. Soften iManage Project Attribute so this can be a field other than Custom29.
- ★ #24537. Changed the way we were looking up a user in the iManage database to support iManage databases with a large number of Users.
- ✓ #24543. Where a custom 29 value is used correct the list of Project attachment's that are displayed.

Virtual Cabinet

- ★ #24538. Improve performance when working with VC by changing the methods used to access data and create projects.
 - Project Loading now using a new method to retrieve project documents
 - Project creation process now uses the new VC 'File Again' function to create Projects, this process creates the file copy on the VC server.

Note: To make use of the File Again functional change for Excel files, a change to when the Excel APS sheet is inserted is required. For this change it is best to have the APS sheet inserted and updated when the documents are opened as opposed to when the Project is created as per the settings below.



- ★ #24489. Add a new menu option in Workpapers Project Level to 'Check In' all 'Checked Out' documents by the same user.

Refer appendix 1

- ★ #24488. Where PDF allows 'Checking Out' documents in Workpaper Setup. A new 'View File' menu option is added to an 'Editable' Project Work Item PDF attachment.

PDF attachment will default open in 'Read Only' mode, unless the user selects 'Open File' from Project Work Item menu.

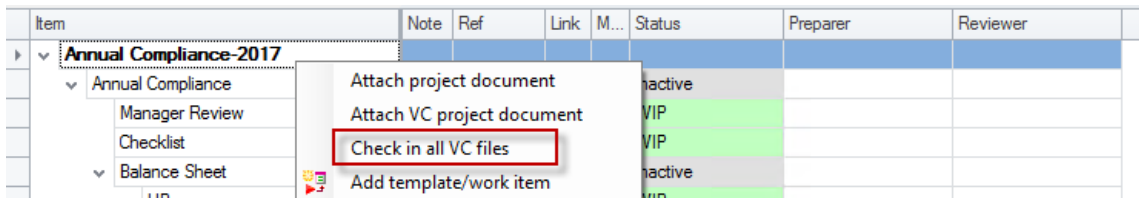
Refer appendix 2

- ✓ #24446. Update how the VC logged in user is determined, this was to resolve issues where Windows usernames differed from their windows login name.

Appendix 1: Check in DMS files

For VC and iManage integrated Document Management systems there is a new function at the project level that enables the user to check in any project documents that the user currently has checked out.

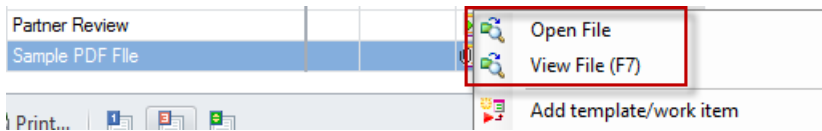
Item	Note	Ref	Link	M...	Status	Preparer	Reviewer
Annual Compliance-2017							
Annual Compliance					Inactive		
Manager Review					VIP		
Checklist					VIP		
Balance Sheet					Inactive		



Appendix 2: Opening PDF files.

When opening an editable PDF file the default behavior is now to VIEW the file, not edit the file. To edit a file the user must select 'Open File' from the menu options.

Partner Review				
Sample PDF File				



Open File
View File (F7)
Add template/work item

Appendix 3: Project Team Security

There has been a functional change to 'Project Teams' with this release of Workpaper Management. Teams will now be referenced by the project. Each time a project is opened, the Project Team members and associated roles will be dynamically applied based on the Teams current members and their roles.

Existing Projects have Fee Earners attached to the project with specific roles applied. These existing Projects can be edited via Project Team Maintenance as below to remove the individual team members and adding an applicable Team if desired.

Team Maintenance

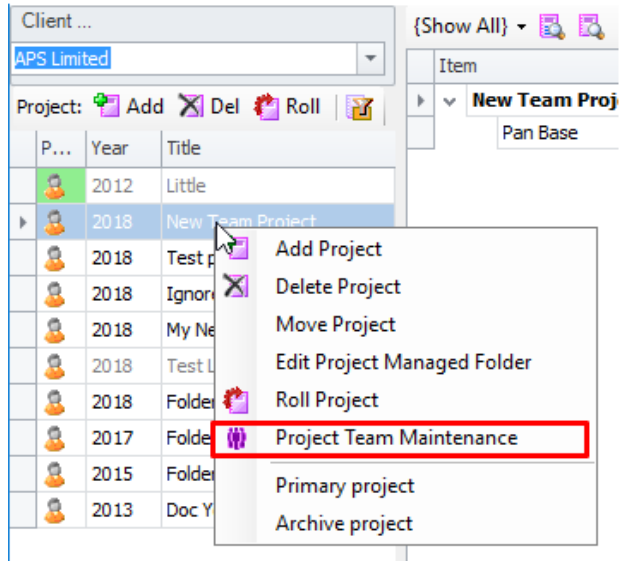
A new display list has been added to the 'WM Team Roles' maintenance page. When a Fee Earning is selected in the 'Fee Earners' list, a list of the teams the selected Fee Earning is a member of is displayed for reference purposes.

The screenshot shows the 'WM Team Roles' maintenance page. At the top, the 'Team' dropdown is set to 'Compliance Team'. Below this, the 'Fee Earners' list is displayed, with 'Anna Taylor' selected. A red box highlights a message: 'Groups Fee Earning is a member of Compliance Team'. Below the 'Fee Earners' list is a table of team members and their roles.

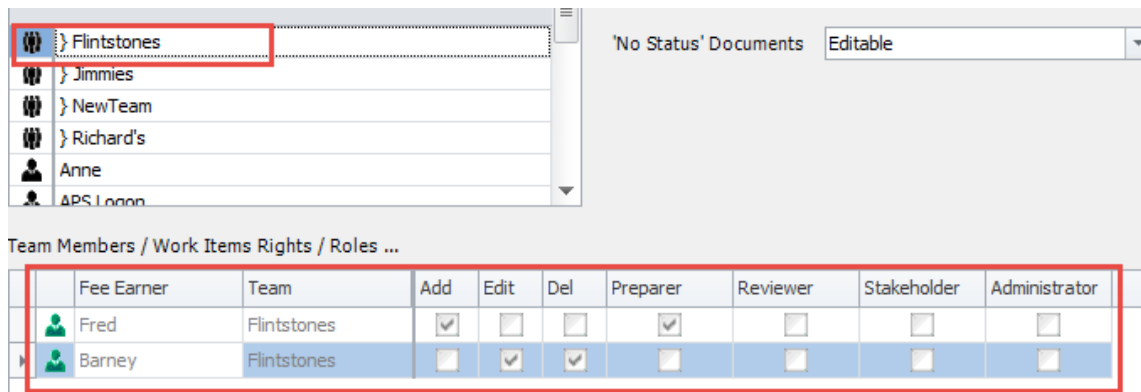
	Fee Earning	Add	Edit	Del	Preparer	Reviewer	Stakeholder	Administrator
▶	Anna Taylor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Nigel Edwards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Jane Doe	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Amanda Millar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Paul Brown	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	APS Logon	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Project Team Maintenance

Right click on a project and click Project Team Maintenance



Selecting a team, displays the list of fee earners with their roles (which is set in Team Console).



When a Team is added to a project, a link to the Team is inserted instead of adding Fee Earners individually. There is a new column as shown below to display which Team the Fee Earners belong to.

	Fee Earning	Team	Add	Edit	Del	Preparer	Reviewer	Stakeholder	Administrator
▶	Fred	Flintstones	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Barney	Flintstones	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	FE 1	Jimmies	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	David---	Jimmies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Teams can be added or removed from the projects. However, the roles of Fee Earners within a Team cannot be edited via the Project Maintenance window. If you want to make permanent changes to the role of a Fee Earning, you must do this via the Teams console and WM Teams maintenance. If you want to change the roles of an individual Fee Earning on selected projects only please see below for further instructions.

	Fee Earning	Team	Add	Edit	Del	Preparer	Reviewer	Stakeholder	Administrator
	Fred	Flintstones	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Barney	Flintstones	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Fred		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	FE 1	Jimmies	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶	Dav		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A Fee Earner can now be added to the same Project multiple times. This can either be done by adding different teams or by adding a Fee Earner. Their effective permissions will be an accumulation of all rights.

For example; Barney who is a member of 'Flintstones' has Edit and Delete rights, he is also a member of 'NewTeam' with Add rights. This gives Barney permission on this project to Add, Edit and Delete.

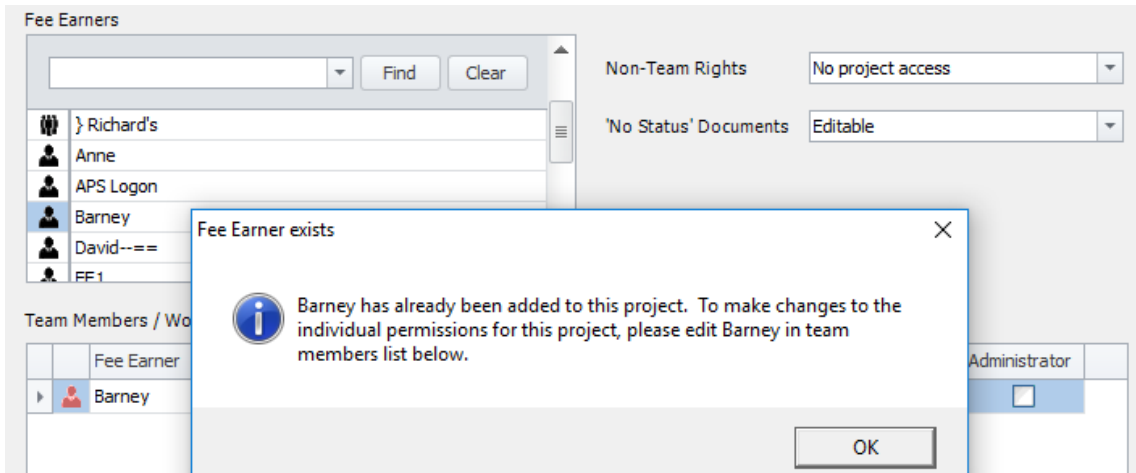
The screenshot shows a list of teams on the left: Flintstones, Jimmies, NewTeam, Richard's, Anne, and APS Login. Below this is a table titled 'Team Members / Work Items Rights / Roles ...'. The table has columns for Fee Earner, Team, Add, Edit, Del, Preparer, Reviewer, Stakeholder, and Administrator. Two rows for Barney are highlighted with red boxes: one for the Flintstones team (Edit and Del checked) and one for the NewTeam team (Add checked).

Fee Earner	Team	Add	Edit	Del	Preparer	Reviewer	Stakeholder	Administrator
Fred	Flintstones	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barney	Flintstones	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barney	NewTeam	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FE1	NewTeam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Adding an individual fee earner to a project when that fee earner already exists in the project as a team member, displays the message below.

The screenshot shows a 'Create project team' window for 'Project one'. It has a 'Fee Earners' list with a search box and buttons for 'Find' and 'Clear'. A dialog box titled 'Fee Earner exists' is overlaid on the window. The dialog contains a question mark icon and the text: 'Fred has already been added to this project as a team member. Would you like to add Fred to enable additional permissions for this project?'. There are 'Yes' and 'No' buttons at the bottom of the dialog. In the background, the 'Team Members / Work Items Rights / Roles ...' table is partially visible, showing Fred and Barney as team members.

When a fee earner has already been added as an individual to the project adding that fee earner again, displays the message below.



Project Team Security Enforcement

There is a new setting to enforce project security by requiring the selection of a Project Team on creation of a project.

The System and User Product setting – ‘Project Teams Enforced’ controls the enabling of this functionality.

When ‘Project Teams Enforced’ is set to ‘False’ – the user can either Accept/Ignore Project Teams when a new project is created (or rolled over).

Project Teams Enabled	True
2.6000	
Project Teams Enforced	False

Create project team

Test project

Fee Earners

<input type="text"/>	Find	Clear
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- Flintstones
- Jimmies
- NewTeam
- Richard's
- Anne
- APS Login

Non-Team Rights: No project access

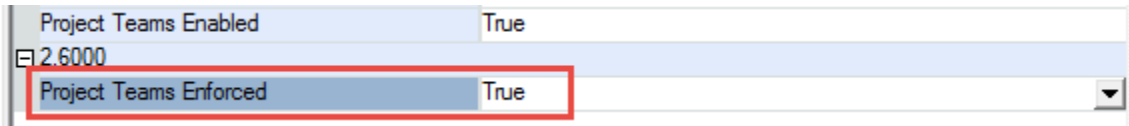
'No Status' Documents: Editable

Team Members / Work Items Rights / Roles ...

Fee Earner	Team	Add	Edit	Del	Preparer	Reviewer	Stakeholder	Administrator
------------	------	-----	------	-----	----------	----------	-------------	---------------

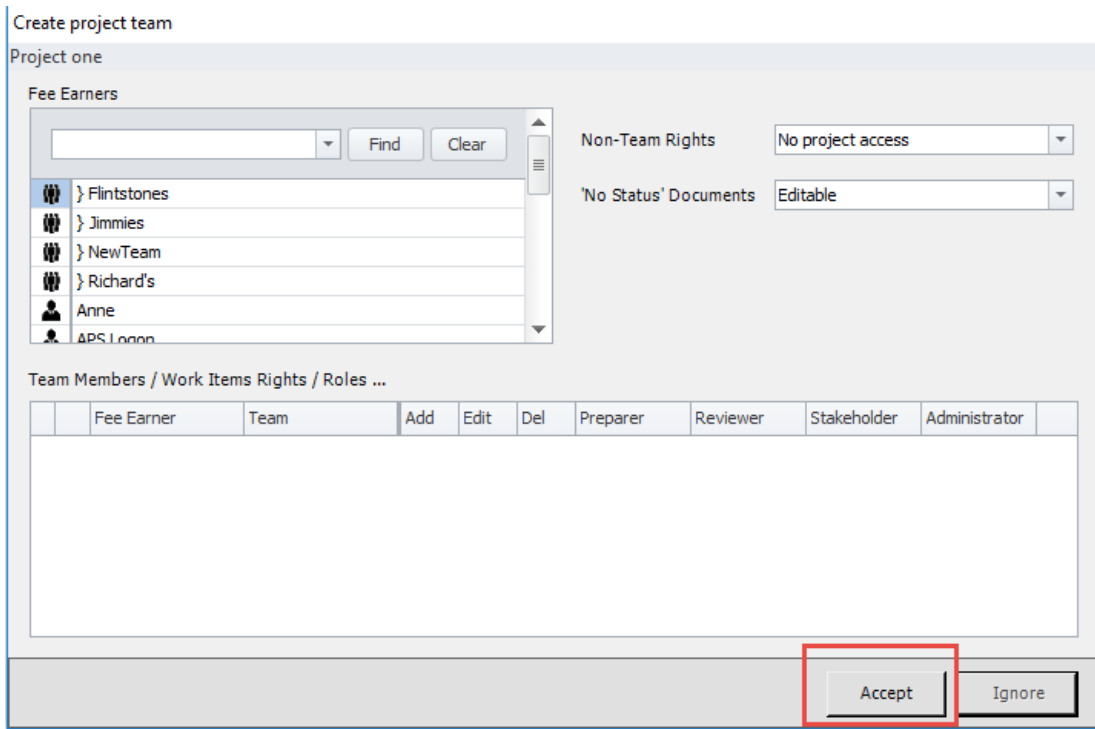
Accept Ignore

Where 'Project Teams Enforced' is set to 'True' – the user must add at least one Fee Earner or Team to the Project being created (or rolled).



The screenshot shows a settings panel with two rows. The first row is 'Project Teams Enabled' with a value of 'True'. The second row is 'Project Teams Enforced' with a value of 'True'. The second row is highlighted with a red rectangular box.

When a new Project is added, adding a Team or Fee Earner becomes mandatory and the Ignore button is disabled.



The screenshot shows the 'Create project team' dialog box. It includes a 'Fee Earners' list with items like 'Flintstones', 'Jimmies', 'NewTeam', 'Richard's', 'Anne', and 'APS Login'. There are also dropdown menus for 'Non-Team Rights' (set to 'No project access') and 'No Status' Documents' (set to 'Editable'). At the bottom, there is a table with columns for 'Fee Earner', 'Team', 'Add', 'Edit', 'Del', 'Preparer', 'Reviewer', 'Stakeholder', and 'Administrator'. The 'Accept' button is highlighted with a red rectangular box.