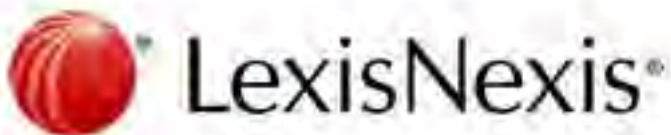


# PCLaw<sup>®</sup> 11.0 Service Pack 1

## Release Notes



# PCLaw® 11.0 Service Pack 1 Release Notes

Learn what's new and what issues are addressed in this release of LexisNexis® PCLaw® Practice Management software.

## What's New in Service Pack 1

There are no new features and enhancements in PCLaw 11.0 Service Pack 1. See *Issues Addressed* for a list of fixes included for this release.

## Previous Features and Enhancements

The following features and enhancements were included in PCLaw 11.0.

- PCLaw Mobility: View and edit commonly used information from your mobile device using PCLaw® Mobility web interface.
- QuickBooks® Link: Import your PCLaw data into QuickBooks.
- Advanced Security: Stronger password encryption, stronger security requirements for passwords, and new options for administrators to notify users and control program access.
- Fujitsu ScanSnap: Documents can be scanned directly into PCLaw Document Manager.
- Other Enhancements:
  - Case management features can automatically be enabled during installation
  - Contacts can be displayed on Phone Message Pop-up screens
  - Users can select and import holiday files.

## Obtaining the Software

PCLaw 11.0 SP1 is available either via download or on CD. A download link appears in your product key email. To obtain a CD, call Sales at 800-328-2898.

**Note:** PCLaw service packs and hotfixes are not available on CD. For assistance in downloading service packs or hotfixes, please visit the [Support Center](#), contact your LexisNexis® CIC (Certified Independent Consultant), or call LexisNexis Technical Support at 800-387-9785.

## Before You Install

Be sure to do the following before installing PCLaw 11.0 SP1:

- Perform a **complete backup** on your PCLaw data files and documents.
- Close PCLaw and all open applications on your computer.

# Issues Addressed

## Service Pack 1

The following issues are fixed in Service Pack 1:

### Banking

- 2600517 When performing a Bank Reconciliation and selecting the 'Skip Zero Balance Cheques' option, only cheques with a balance greater than zero will be displayed.
- 3034436 Only a single Bank Reconciliation 'Marked Items' window can be opened when performing reconciliation activities.
- 3084245 Cheques written to a vendor allow and apply the vendor's middle initial and is handled the same for A/P and when it is added to 1099 forms.
- 3114404 When reprinting a reconciliation report for an altered bank entry (i.e., G/L allocation, explanation), all reconciled entries are accurate and displays properly.
- 3108773 Receipts and cheques are printed when doing a Bank-to-Bank transfer.
- 3733659 If multiple bank accounts are accessible, the system properly gives the user access to the account identified as the default account as a first alternative.

### Billing

- 3405452 Fee changes made during a bill release is saved appropriately and does not use the original fee amount for billing purposes.
- 3673954 The Explanation code is displayed in the 'Charge Selection' window the same as it was for the Time entry.
- 2589059 Post-dated Quick Bill amounts with unbilled time entries added will be the same on the Billing Fees Journal and on the Client Ledger.
- 2431131, 2592220 When a Trust-to-General Transfer bill is created, if the beginning of the transfer's explanation is changed, when the bill is 'Recreated', the transfer amount is corrected reduced and reflected in the 'Balance Now Due' field.
- 2451250 When the 'Print General Receipts' and 'Print Trust Cheques' options are not checked, the 'Trust Transfer Information' window does not display the 'Print' option.
- 2438402, 2460470, 2475499 When invoices containing special fees are recreated, disbursement GST amounts are accurate and reflect the original bill amount.
- 3677794 When the 'Automatically Create Disbursement at Billing' option is selected and the 'One Time Amount', an amount, and the G/L Account information has been entered on the Billing tab of the Matter Manager, if a bill is not posted or is cancelled and the matter is then billed again, an automatic disbursement will be created for the initial and any subsequent bills.
- 3284569 If a bill is created or recreated with the output slated for email or PDF, a second email window with a blank PDF attachment will not open, or if 'Output to PDF' is enabled, only one PDF file is created.
- 2516455 The correct balance and payments received for a specific invoice is always reflected correctly if a mass billing is performed in which the 'Include if Payments Since Last Invoice' option is selected for the billing.

### BillFlow Manager

- 3472050 Selecting the option 'Prompt Before Posting Bills' in System Settings prompts the user before a bill is posted.
- 3676629 The 'Assigned To' drop down list displays properly when selected.
- 3172066 All options selected in the Trust Transfers area of the Options tab on the Bill Selections screen function properly (e.g., when 'All Trust Transfers on One Cheque' is selected, all Trust Transfers will be printed on one cheque).
- 3172038 Adding a new matter to a BillFlow will produce a summary report when the option 'Produce Summary Report' is selected on the Options tabs.

- 3472073 Choosing to cancel out of the Billing information screen while processing a BillFlow with the 'Prompt For Changes to Billed Amounts' option selected will not designate the bill as REQ.
- 3472060 Creating a matter that has time and fees included as a part of the BillFlow with the 'Select Charges' option selected, displays all billable charges (i.e., time and fee entries) on the Charge Selection screen appropriately.

### Calendar

- 3446798 Re-occurring Calendar entries are displayed correctly for upcoming months.
- 3180169 Reminders for Appointments and ToDo's are correctly displayed for upcoming events.
- 3357153 Attempting to change time entries after is has been billed generates an error message stating that the billed entries cannot be corrected and will not be displayed.
- 3201756 All entries for a specific series will be deleted from the Calendar when the 'Open the Series' option is selected, followed by clicking the 'Remove' button.

### Contact Manager

- 3631452 The Contact Manager functions properly and is not based on the user's level of access.
- 3111262 If the 'Display As' field for a client is changed from either the Client or Matter Manager, the 'Display As' field in the Contact Manager for that client is also changed.

### Conversion

- 3766456 Explanation codes (i.e., mark up and quantity rates) are correctly converted after performing a conversion.

### Custom Tabs

- 3660805 Creating and adding Custom tabs to matters with a date before 1982 is correctly displayed as that date.

### Database

- 3101276 Attempting to create a Matter using a duplicated Matter number and then changing it to reflect a unique Matter number creates the Address information record appropriately for the client.

### Data Entry

- 3167078 For Windows XP® users, the cursor displays in the Allocation explanation field on the Expense Recovery screen if the DPI is set to Large.
- 2936251 If the 'Allow Charges to be Held' option has been disabled on the Data Entry screen under System Settings and time entries are made from the Quick Timer and the Time Sheet, both entries are shown on the bill once created.
- 3697897 When posting a payment to multiple Matters that result in an overpayment, in addition to the message stating an overpayment, an 'Overpayment Allocation' screen is also displayed.
- 3036201 Time entry postings that are delayed will be incrementally increased by the value set in the 'Round Time Entries to \_\_ Hs' field on the Data Entry form under System Settings.
- 3074433 After making changes to a Trust bank account and clicking the 'Tab' key, instead of next moving to the Matter field, it proceeds in the following order: Cheque number -> General Account -> Receipt number -> 'To' field.
- 2961780 If a user make time entries using the Time Sheet, right click in the 'Explanation Code' field, followed by tabbing to the 'Explanation' field, and then minimizes the Time Sheet, data will continue to display in both the 'Explanation Code' and the 'Explanation' fields.
- 3272831 Amounts in the 'Total' field are retained after selecting a Matter for Trust Administration fees.
- 3416026 Data entered into the 'To' fields is displayed correctly if the default font is changed on the 'Other' tab of the Workstation Settings screen.

### General Ledger

- 3731016 When a payment with incurred interest is entered for multiple Matters, if the payment is made void, the interest amount reflected for the General Bank balance is the same as the General Bank Journal.
- 3483859 Entering the name of a newly created bank account in the 'Start' or 'End' field of the G/L Account Selection screen generates and displays the account information correctly.

### Matter Manager

- 3172769 Fee entries are promptly removed when the 'Remove' option is selected on the 'Correct-Fee Entry' screen.

- 3669786 Clicking the 'New' button on the Ledger screen of the Matter Manager opens a new Note window.
- 3669791 After modifying Time entries in the Ledger tab of the Matter Manager and clicking the 'Refresh' button, the Ledger tab is refreshed and all entries are present/displayed.

### Miscellaneous

- 3155373 A maximum of twelve (12) characters is displayed for the Matter number on all Matter Summary screens.
- 2513240 When large reports/data is exported to Excel, the corresponding .xml file is not corrupted and opens appropriately.
- 2998724 The 'About PCLaw' Help screen displays only the active number of timekeepers with a 'Partner' category in the firm/partnership.
- 3071178 Creating a bill/pre-bill and selecting a client with multiple Matters from the 'Select Matters' screen, displays that client's list of Matters. At that time, any Matter selected in that client's list of Matters is displayed at the top of the list.

### Outlook Connection

- 2831667 Time posted to PCLaw without being reviewed does not display duplicated text in the Explanation Code field.

### People - Matters

- 3678004 When a default department is selected for a client on the Client Manager screen after selecting the 'Track G/L Revenues by Department' option on the Other tab of System Settings, the default department is automatically displayed in the 'Dept.' field of a new Matter when it is created.

### People - Vendors

- 3815529 When a new vendor is created using their first, middle and last name along with other details (address, etc.), the address and other details is automatically entered for payables when the 'Use Memorized Transactions' option has been selected.

### Recurring Entries

- 2968926 A recurring entry for a Firm Receipt can be changes without a tax category being identified.
- 3345866 When a user create a recurring entry (Data Entry -> Accounts Payable -> New Payable), enters the appropriate screen details, clicks 'Create' under Recurring Entries, and then clicks 'OK', upon returning to that payable, all data is displayed in the correct columns and fields.

### Register

- 3172793 Removing a 'Trust-to-General Transfer' entry from General tab of the Register removes it from the list of transfers and cannot be displayed.
- 3066592 If the Ledger tab of the Register is filtered to only display disbursements, then only disbursement will be displayed, not to include Trust receipts/other (i.e., Payments/Fees).
- 2853438 When an Expense Recovery entry is made for a Matter, the date range displayed on the Expense tab is the same as the date range displayed on the Ledger tab.

### Reports

- 3396168 When the 'Show Details for Matters with Balances Greater Than or Equal to' is selected and an amount is specified, when a report is generated, only Matters with amounts equivalent to the option setting is displayed.
- 2897706, 3051038, 3117445, 3407288 Payable Listing reports that are exported to Excel displays the vendor number and name that same as on the listing report itself.
- 3185161 The 'Hours Var. %' value on the Lawyer Budgeting report is calculated and displayed correctly when the 'Budget vs. Worked' option is selected on the Common screen of the report.
- 3280979 The Contact Listing report generates a complete listing of clients and the associated data based on the Matter(s) selected.
- 2810195 When generating a G/L Reconciliation Report, the balance for the Client, Journal, and G/L all matches the amount(s) entered on the Matter.

- 3012244 Matter information is correctly displayed on the Client Accounting Ledger report without having to refresh the report when the Responsible Lawyer and the Client Intro Lawyer is different.
- 3114675 Accounts Payable Reports (i.e., Payable Listing, Payment Listing) will always display data entries in a chronological order no matter whether the report is run for single vendor or multiple vendor(s).
- 3126211 No error message will be generated when selecting the Adv. Search option from the Common screen and entering the Field, Comparison, and 'Compare To' information if the search window is closed and then re-opened. The data in the 'Compare To' field will remain constant and is the same as the original data entered from the pop-up list.
- 3207083 After a new Custom tab has been created, the last field on the Custom tab will be listed in the list of available fields to be searched when performing an Advanced Search from the List of Clients.
- 3503113 Time entered using the 'Non-Billable Work' and 'No Charge' task codes will be added/combined when a Time Listing Reports is generated.
- 3374485, 3387821 The data in the G/L column of the G/L Reconciliation Report is not displayed inaccurately (off by one day) if the original entry was back dated.
- 3028815 The 'Hours Var. %' value on the Lawyer Budgeting report is calculated and displayed correctly when either the 'Budget vs. Worked' or 'Budget vs. Billed' option is selected on the Common screen of the report.
- 3670662 The 'Field' drop-down list values on the Vendor Listing Advance Search screen are displayed correctly.
- 3738359 The 'Firm Totals' on the Productivity by Client Report correctly matches the Client Trust Listing/Client Trust Ledger Report(s) and the percentage '%' calculation is based on the 'Firm Totals' values.
- 2625168 Running the Client WIP, Billing and Collection Summary Report for a major client to include associated clients, correctly displays all clients (major and associated) information.
- 3037238 Matter labels successfully prints when selecting a specific billing frequency.
- 3664309 Entries made to the General Journal can be displayed in the General Bank Journal and they can also be removed from the journal without generating error messages.
- 3393919 Values/amounts on the Fee Allocation Summary Report do not double/continue to double if the Refresh button is clicked.
- 2783353 When the 'Show Journal Entry on CST Entry' option is selected and multiple lines are used for making the adjustments to the account, the GST Journal displays details of all the adjustments made.
- 3831401 Selecting the 'Hard and Soft Cost Analysis' option on the Disbursement Analysis and Interest screen correctly displays expense entries in the report as a 'Cer' value in the Src Ref# column with the amount in the "Soft Cost" column.

### Reports - Customizable

- 2725508, 3217774 When the 'Detailed Report' option is not selected on the Common screen of the Payable Listing Report, only limited information is displayed.
- 3022142, 3074335, 3079543 The Purchase Journal Report displays the complete details of each applicable invoice when the G/L Account filter is used as a report generation option.
- 2927621, 2974949, 3017626 A corrupt file is not produced if the user chooses to save the file to Excel when the 'Totals Only' option is selected when preparing to run the Client Ledger Report.
- 3196425 Custom Reports run with the 'Active Matters' checkbox selected generates a report with only active Matters listed.
- 3670657 When changing the Default layout of the Vendor Listing Report (Customizable Report – Layout), all fields are displayed in the 'Field Information Available' column.
- 3050880 If the Vendor Ledger is run for an Inactive vendor, all entries for that vendor are displayed.
- 3492902 Report Columns of the Custom Report displays appropriately using characters instead of as a numerical value.
- 3083480 From reports accessed by drilling down in the Client Summary Report (i.e., Client Trust Listing, Client Fee Listing, Receivables by Client, etc.), other reports and functions (i.e., Change Bill, access Matter, etc.) can be accessed from them.
- 3023056 All missing cheque numbers are displayed on the General Bank Missing Cheques Reports.

- 3080204 Matters that have a zero balance or has been fully paid with payments to Interest are not listed on the Client Summary Report when the 'Zero Balances' option on the Other tab of the Client Summary Report is not selected.
- 2797223, 3561860 When added to the List of Clients Report and the 'Allow Bill Setting Overrides' option is appropriately selected (i.e., Matter form, etc.), the token is displayed correctly to reflect the applicable parameters (0's and/or 1's).
- 3171294 Custom Reports that are run for a specific lawyer displays the 'Report Month' hours (MTD) that have been billed only for the month entered (i.e., Sep 2011). The report displays the 'Start of Year' hours (YTD) from the start of the year up through the current month.
- 2656129 Word wrap has been enabled for the Matter Description field of the Client Fees Listing Report, enabling the display of the complete description and allows the report to run properly.

#### **Search**

- 3078666 Performing a Conflict/Global Search when using the Name Contains 'Name Matching Rule' option, properly displays all records/entries that contains the search criteria.

#### **Template Editor**

- 3197614 The information for the Payee Address is properly displayed and prints correctly when the 'Payee Address (5-Line)' token is used to add additional address area.
- 2928416 If a new formula is created on a financial statement template, it will correctly display accurate calculations and provide users with the ability to select from a range of accounts.

#### **Terminology**

- 2657207, 2971219 Terminology changes for Lawyer categories are properly applied to the Lawyer Rates and other reports, and are therefore displayed according to the terminology changes.

## **PCLaw 11.0**

The following issues were fixed in PCLaw 11.0:

#### **Banking – Trust Bank**

- 3548114 A held Trust receipt does not continue to appear in the TBals summary section of a matter after you remove the held receipt.

#### **BillFlow Manager**

- 3039445 All Matters added to the BillFlow Manager display correctly.

#### **Billing**

- 2633330 During prebilling, changes to a charge are correctly displayed.
- 3337925 When mass billing a matter with an A/P cheque where the matter has been billed multiple times, all allocations display as expected in the client ledger.
- 3333395 After undoing a split bill, creating a new bill with the same invoice number, and then undoing that bill, the process completes in a timely manner.
- 2550106 Electronic bills are created as expected for all split matters.
- 2598422, 2718690 Matter allocations are correctly displayed for multi-matter AP disbursements using the mass billing function.
- 3411758 With "Separate hard and soft costs" enabled, the Billing (Fees) Journal correctly displays the split of hard and soft costs in the allocation area.
- 3464375, 3455656 Fee adjustments made on the Billing Information screen for a Request Bill cause the Net Bill amount to update when you tab through the Fees fields.
- 3046740, 3046696 With Sales Tax disabled and GST enabled in system settings, Quick Bill will not charge sales tax when a "P" code is in the allocation area of a general cheque.

- 3526878, 3582751, 3288372 Writing off a fee or disbursement in the charge selection screen does not produce a “File in use” message.
- 3671968 The settlement statement shows fee adjustments at the time of billing.
- 3669742 Running the client ledger report for an unbilled matter can be done while running a bill or pre-bill.
- 3715865, 3727244 (Alberta) Using special fees entered through expense recovery along with automatic disbursements does not record a negative entry on the client ledger.

#### **Calendar**

- 3089789 The ‘Show Alert’ option works as expected when adding a new appointment.
- 2984889 A linked date item with over 300 characters in its action can be added to an appointment.

#### **Contact Manager**

- 2687820, 2690434, 3042513 Large numbers of contacts (over 100) can be individually selected for export from the Contact Manager without causing the export to fail.

#### **Custom Tabs**

- 3146115 The handling of radio button groups on Custom Tabs has been improved.

#### **Data Entry**

- 3327591 Australian installations do not permit the deletion or removal of trust transactions. Such transactions can only be reversed.
- 3141868 Individually selected allocations on a general cheque can be transferred reliably from one matter to another.
- 3674132 Changes to the amount in the AP register are saved as expected.

#### **Electronic Billing**

- 3607636 Quantity values display correctly on the e-bill for decimal values.

#### **Link API**

- 3459100 The Next Matter Number for clients shown in the PCLaw Link and in PCLaw is always consistent.

#### **Matter Manager**

- 3483344 Changes to one matter viewed in Matter Manager do not affect the Transaction Change ID on other matters viewed in the same browsing session.
- 3557817 The lawyer nickname appears on the report when printing notes from the Matter Manager.
- 3019398, 3183367 Reports printed from the ‘All’ tab in the Matter Manager show the entry date for time, fees and documents rather than the current date.

#### **Miscellaneous**

- 3669717 Increased field length from 12 to 20 characters on Lawyers and Rates screen.

#### **Outlook Connection**

- 3483667, 3476675, 3486705 PCLaw prompts you to save emails in Outlook when ‘Use Cached Exchange mode’ is disabled in Outlook.
- 3475163 The PCLaw toolbar in Outlook is automatically disabled when you deselect the option to ‘Enable connection for Email Tracking and timer’.
- 3500675, 3496478, 3476708 When ‘Use extended Outlook features’ is selected, contacts synchronize without displaying a warning/confirmation message.
- 3502982, 3476708 The Lexis® Back Office menu is restored to the Outlook menu bar.

#### **QuickBooks® Link Utility**

- Opening balances with partial payments does not produce an error while importing credit memos during the QuickBooks sync.
- Error messages are not generated when creating General Journal entries and synching with QuickBooks.

The QuickBooks Connection Manager does not duplicate write ups/downs on the Client Ledger after being synched with PCLaw.  
The 'Paid To' field of a check/receipt in PCLaw truncates when entries exceeding 40 characters are sent to QuickBooks.

#### Quick Step

3714566, 3722851 Classic Quick Step works when running Internet Explorer 9.

#### Reports

3159274 Multiple trust receipts and cheques for a matter do not cause Interest on Client Acct to calculate interest when interest criteria are unmet.  
3411758 Disbursement Analysis and Interest correctly displays hard and soft costs when 'Separate hard and soft client costs' is enabled in system settings.  
3332872 Client Trust Ledger report works correctly when 'Sort by Responsible Lawyer' and 'Show matters with balance greater than 0.01' are selected.  
3178699 For matters with multiple trust receipts entered on different dates within a single interest band, interest is calculated daily instead of calculating interest using the end balance over the entire period.  
3117535 The Billing by Lawyer report can be added to any report group.  
2841175 Firm Totals report shows proper values when 'Firm Totals Only' is selected.  
3253567 Vendor Listing report with Total Payable or Total Purchases tokens added to a customized layout produces the proper results.  
2829817 Custom reports with 'WIP – Fees exclude Contingency' or 'WIP – Disbs exclude Contingency' function correctly.

#### Search

3455204 Running a conflict check while bills are being created does not produce a 'File in use' message.

#### Security

3534685 Removed a method for users to access restricted menu options.

#### SQL

2609069, 2671228 Users are prompted to confirm the archival of matters with unbilled time or disbursements.  
3585066 The Client Ledger and Billing Fees Journal match as expected when 'Use queries for reporting' is enabled.

#### Template Editor

3079181 Billing and pre-billing proceed normally when a Formatted Name is used on the billing template for the Client Summary.  
3015258, 3110944 Graphics added to the first page footer display when sent to the editor.  
3577723 The Previously Billed Fee token take into account fee adjustments made at the time of billing in the previous bill.  
2964240 Check templates save changes to the amount symbol for future use.  
3741611 The Fees Billed to Date token takes into account previous fee adjustments made at the time of billing.

#### Timers

2611828, 2758000 A delay-posted time entry will not be posted when a matter other than the one the time entry is assigned to is open in the Matter Manager.

## Plans for the Future

The following issues will be addressed in a future release.

### Banking

3085977 General-to-Trust transfers will not update bank balances on the day of transfer.

### BillFlow Manager

3472070, 3426735 Creating a bill and selecting the options to Print Client Summary and Produce Summary Report produces a Pre-Billing Summary Report only.

3221417 A Matter with 'Max Fees' threshold set, produces a bill for an amount greater than the fees entered, with a negative adjustment to the Matter but not the bill.

### Billing

3683511 Selecting a bill for release and specifying a date prior to the date of the last entry on the bill creates the bill.

3151396 Fee adjustments made at the time a bill is requested are reallocated at the time the bill is released.

### Data Entry

3631265 On the Receive Payment screen, reports are off when payment is made if there is a previous negative payment.

### Document Management

3303229 Properties of existing precedent documents cannot be modified on the Precedents tab of the Document Manager.

### Mobility

3674774 The search button must be clicked again to apply the My Matters Only filter.

3674934 Notification is needed that Mobility services must be restarted after running Verify Data Integrity in PCLaw.

On BlackBerry® 9800/9700, contacts with invalid email addresses cannot be saved.

Populating any text field with data in between brackets produces an error.

BlackBerry 8330 is not currently supported.

Search results do not persist when you navigate to a different page and click Back.

Changing a Contact from Organization to Individual (and vice versa) does not always update related Matter links.

When editing a Matter, the Matter number cannot be changed.

When held in landscape orientation, non-iPhone devices scroll to the bottom when a page initially loads.

When you enter and save an invalid home email address, the Email dropdown shows the work email address in the entry for the home email address.

A Matter search from a Time or Expense record lacks the 'Client Name Search By' option on the dropdown menu.

Apple® iPhone® Search buttons do not work on Related Contact/Matter lookups.

After a Matter search based on Client Name, Cancel and Back buttons are inconsistent on the list of Matters for a Client.

On BlackBerry 9800/9700 models, Email validation on the Add Contact screen prevents a new Contact from being saved.

### Quick Step

The Training and Support tab cannot be used if the workstation is not running the same operating system as the server where PCLaw data is installed.

## SQL

3136635, Selection of Matters slows when a client has a large number of active matters.  
3276734  
2978907, When sorting by Client name on the Matters pop-up help screen, for clients that begin with the same  
3046268, name, if the first client in the list is archived then the remaining active clients are not displayed.  
3164159

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