Solicitor Case Manager

Release Notes

Version 5.4.8

Summary of enhancements to versions of Solicitor Case Manager

Release Notes

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Table of Contents

1 Release Notes

1.1 Introduction

These **Release Notes** give details of new versions of **Solicitor Case Manager** and the changes and new features included in each version.

If you require more information about any changes made or any new features, please contact **OPSIS Practice Management Solutions.**

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You can also visit our **Web site** at: www.opsisltd.com

For product documentation and software downloads (patches, anti-virus, etc.) see the **online Support** and **User Group Forum** pages at:
http://support.opsisltd.co.uk
http://forum.opsisltd.info/

2 Version 5.4.8

2.1 General

Client Email Addresses

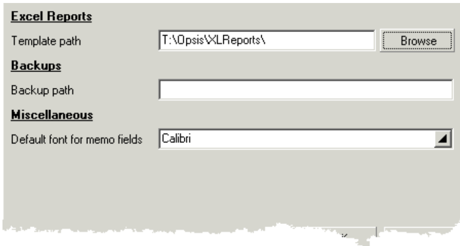
- You can store several different email addresses for any given Client whether they are individuals or companies. A primary address must be allocated and this will be the first email address displayed each time you chose to email from a Case.

Time Recording

- Deleted Time Records are now stored within the Database but you cannot view them as a normal user. Please contact Opsis Support if you wish to view or retrieve any of these.

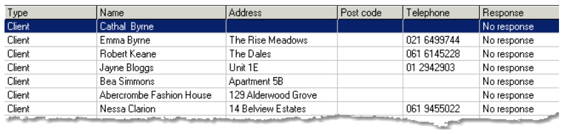
Case Details

- You can specify a default font for all ud Memo fields and this format will be maintained where such fields merge into Word documents.
- This is a system setting and will apply for ALL ud Memo fields.
- Individual ud Memo field formatting can be changed by the user as per preferences

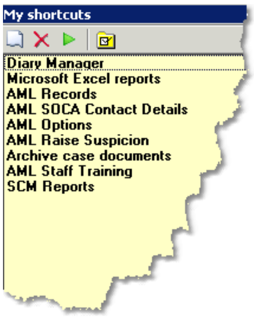


Marketing Module

- Recipient search screen displays the work telephone number
- Multiple Case Statuses can be simultaneously selected



My Tasks/Shortcuts

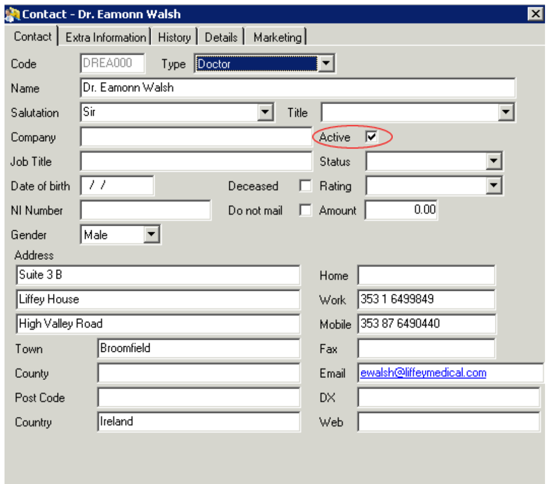


- Diary Manager and Anti Money Laundering options now available to add to short cuts.

(These improvements allow you further refine and set specific Tasks e.g. for Professional Indemnity, which may need to be produced on a regular basis grouping different parts of the system into once central location)

Contacts

- New flag added to Contacts defaulting to *active.* Where the Contact may be redundant, you can de-select this tick box (i.e. inactive), thereby hiding them from selection for Cases.
- Include Inactive option added to Contact search screen allowing look up any Contacts which may not be active.

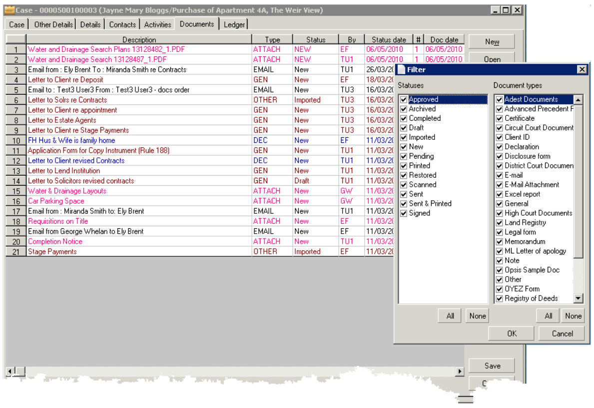


SCM Windows

You can now re-size the following main Windows (width and height) as per your own preferences

- Conflict Search
- Contact Search
- Case Search
- Precedent Maintenance
- Allocate Scanned Documents
- Timesheet
- Notes for Telephone Timer
- Statistics
- Case

2.2 Case Documents

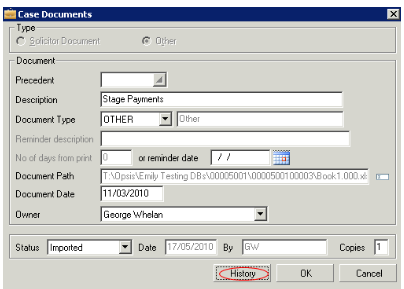


- Filter Option available on Case Documents section, allowing you to *filter out* existing documents according to Status and/or Type.
- Indicator on the Case Documents where a filter is turned on so users know they are not seeing the entire Document list.

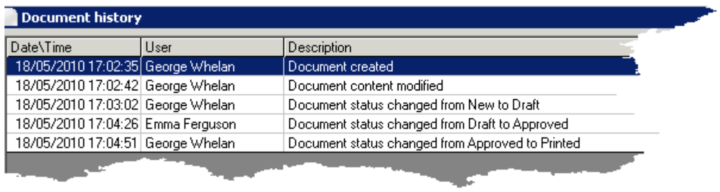
- Document Status button available so users can change the Status of documents highlighted direct by two simple button clicks

- You can now view Closed Case Documents in full, without having to Re-Open the Case. Documents are opened via MS Word but in Read Only format.
- Case Documents are now ordered according to both the date AND time i.e. several created/saved throughout the course of the day will display the most recent automatically at the top of the list.

- Documents now contain Audit Trail of all users who worked on them via the **History** button available on the Documents properties screen



- Audit Trail information contains the User, date the Document was altered and in what manner



Document history

Date\Time	User	Description
18/05/2010 17:02:35	George Whelan	Document created
18/05/2010 17:02:42	George Whelan	Document content modified
18/05/2010 17:03:02	George Whelan	Document status changed from New to Draft
18/05/2010 17:04:26	Emma Ferguson	Document status changed from Draft to Approved
18/05/2010 17:04:51	George Whelan	Document status changed from Approved to Printed

2.3 Bug Fixes

Bug Fixes

The following is a list of bug fixes in SCM v5.4.8:

- Tasks - You can now add a "?" to the template description
- Tasks - Text entered to the body now wrapping
- Windows - you can now maximize/shrink windows without any errors
- Contacts Salutation - will now accept more than 30 chars
- Marketing Module - associate Precedent, merged Case Document or external Word doc to Campaigns no longer producing an error
- Marketing Module - copy an existing Campaign now assigning the correct date
- Marketing Module - confirming results no longer producing an error
- Contact UD fields - tips now being shown in the proper place (previously appeared in "Hidden" column)
- WebLink - removed users now completely taken out of the newly produced database for upload
- Case Documents - User Codes no longer allowing spaces which affected Document Owners
- Case Documents - Activity Rates/Codes now displaying correctly
- Case Steps - Reminders now going to the Case Step Owner rather than user who actioned them
- Link to Word - overrides now executing Save commands properly
- Ledgers - date fields now aligned to the left

3 Version 5.4.7

3.1 Bug Fixes

Bug Fixes

The following is a list of bug fixes in SCM v5.4.7:

- Hearings - in the Opsis_Hearing, the Extended information now shows all relevant fields
- Hearings - Hearing UD field of type Number is now displaying correctly
- Hearings - DTEs in Hearings now displaying correctly when you PRINT from case Activities screen
- Diary Manager - can now manually enter the date ranges
- Conflict Search print results no longer produces an error
- WebLink indicator no longer appearing on all Cases

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4 Version 5.4.6

4.1 General

Allocate Scanned Documents

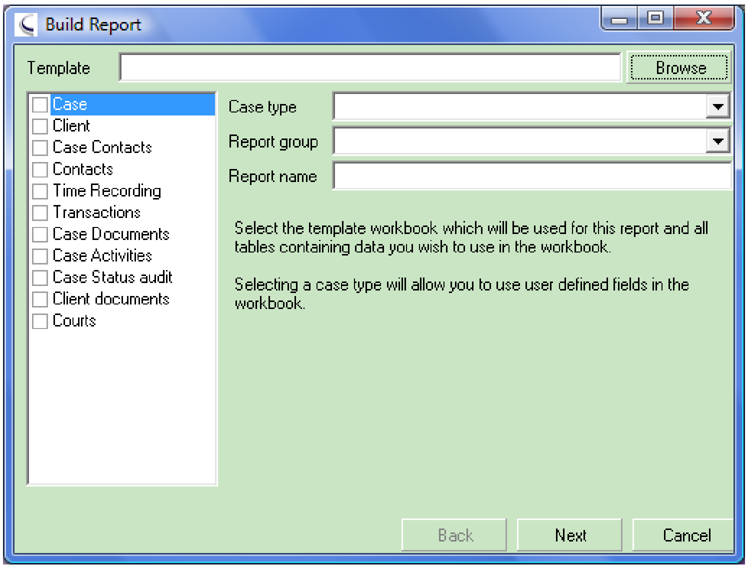
- User Option as to whether scanned documents in sub folders of the main scanned document path are visible or not when allocating documents to a Case.

Case Documents

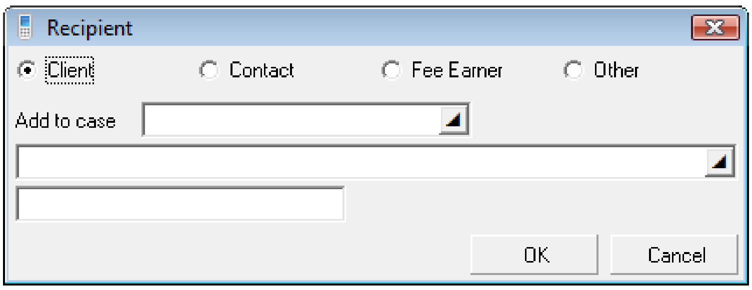
- Case documents now store the "Owner" of the document. By default, the owner is set to the fee earner on the case but can be changed from within the case document details screen.
- Filenames of existing case documents can now be changed by the user.
- The document preview when opening documents on closed cases has been removed. When a case is closed the documents are now marked as read only and, if the user has sufficient permissions, the Edit button can be used to view the document.

Excel Reporting

- **Case Status**, **Courts, Client Documents** and **Audit Trail** can now be included in Excel Reporting
- The report modification window in the Excel Reporting module can now be resized.



SMS



- The SMS Server (OPSIS not eSendex) can now be configured in the application settings.This allows OPSIS to change the SMS server without having to issue an upgrade.
- When you click to send SMS, it now gives you the option to select Client, Contact, Fee Earner or Other. You can also add the sent SMS to a Case

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Precedents

- The check for merge fields when deleting UD fields has been removed, after deleting a merge field the user is prompted that they will need to perform a Validate on the DAT files to ensure that the UD field is not referred to by any precedents.

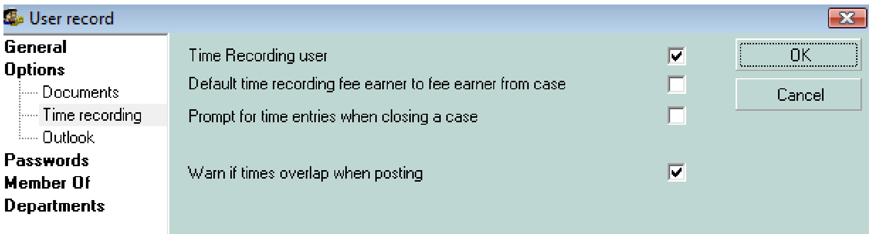
Client/Case Search Fee Earner Selection

- When a fee earner search is invoked from the client or case screens a search facility is available to allow users to quickly locate the desired fee earner. The client type selection is now a drop down list instead of a search.

4.2 Time Recording

Time Recording

- A new option has been added to the SCM **User** record options screen.



- Users are now warned if an overlap between time records exists when manually posting time. This option can be turned off for individual users.

- When closing the case window the users can be, optionally, prompted to record time at that point. Selecting to record the time will display the time entry screen.

- When closing SCM the users can be, optionally, prompted to post time to MA at that point. Selecting to post the time will display the time records screen

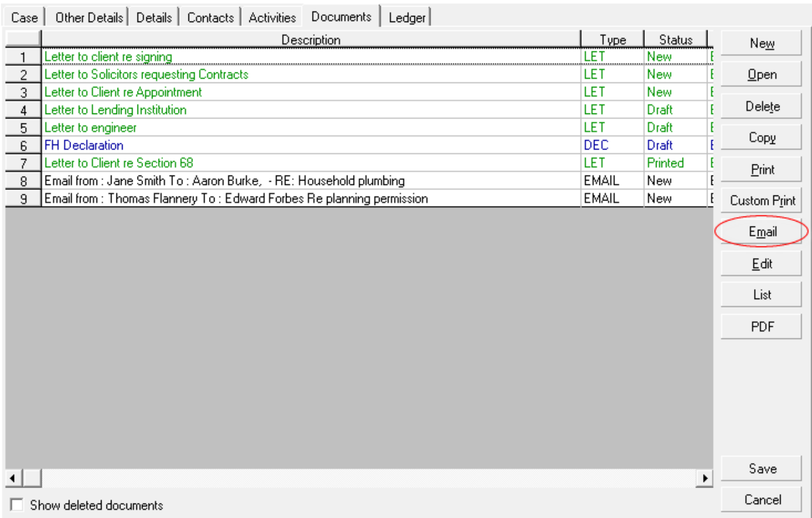
4.3 Email and Diary

Case Email - Incoming and Outgoing

- When adding Emails to SCM cases the description used when saving the Email to case documents can be, optionally, changed by the user. This functionality is controlled using a global setting which can be found in the Diary Options screen and by default, it set to accept Sender Email information

- Replies can be made to Emails stored on a case. Simply highlight the email required for inclusion and then click on the **Email** button on the right. This will automatically include the original email *as an attachment*

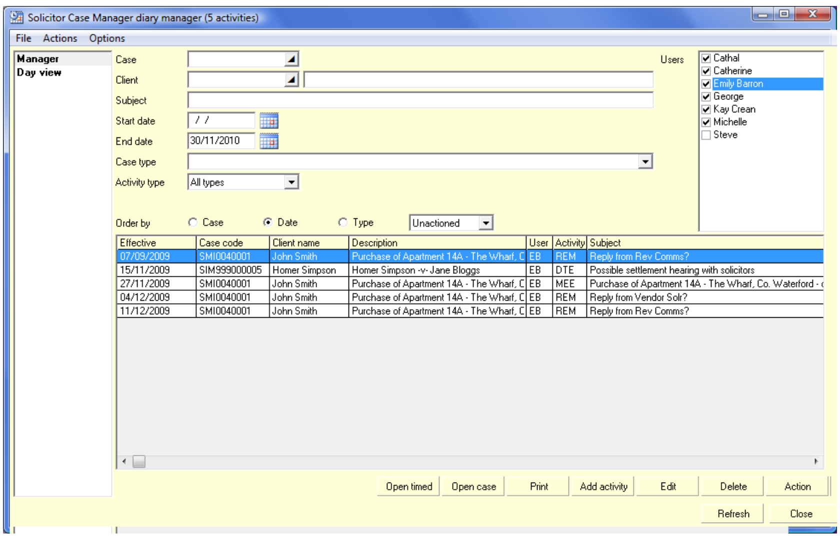
- From your Inbox, you can now right-click on any email and there is an added option to **Add to Solicitor Case Manager** directly



- Emailing from a Case has changed. Instead of the **Email** tab along the top, it has moved to the **Case Documents** tab. Beneath the normal buttons of **New/Copy/Delete** etc

- If you highlight a document and then click on this button, you will be prompted **Attach the selected document to new email**. If you click on **Yes**, then the document is automatically inserted. Saying **No** will open a blank email as normal.

Outlook Integration for Non-Exchange/Diary Manager

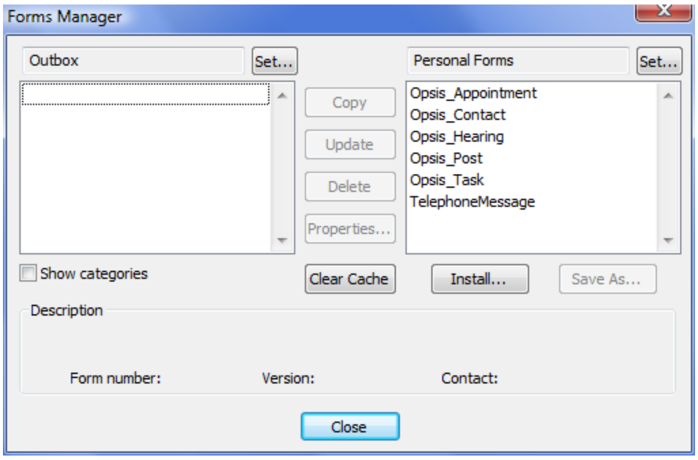


- For non exchange Outlook integration, the Appointments, Tasks and Hearings will be managed through the Diary Manager

- Cases can now be opened with a timer running from the Diary Manager screen

- You can add new Activities direct from the Diary Manager as opposed to having to go back to the Case, open Case Activities and select from there.

Opsis Forms Handling Changes (for info only)



Due to the upcoming modifications and essential design changes being introduced by Microsoft, we have had to alter how these forms are handled.

- Organizational Forms Library no longer being used to store the Opsis Forms.

- Users Personal Forms Library now storing the following Opsis Forms:

Opsis_Task (for Reminders)
Opsis_Appointment (for Meetings)
Opsis_Post (for Case Emails)
Opsis_Hearing (for Court Dates)
TelephoneMessage (for Telephone Messaging)
Opsis_Contact (for Opsis Contacts being stored in central Opsis Contacts folder)

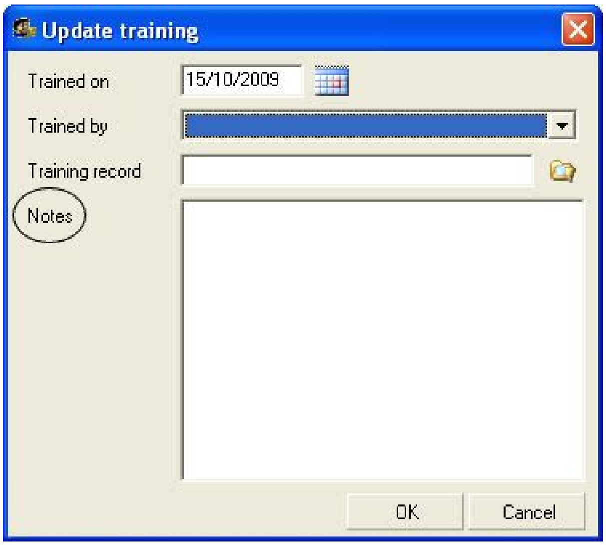
4.4 AML Module

AML _ CDD checks

- A new **Options** menu item has been added to the **Anti Money Laundering** menu.
- Nominated Officers have the option to amend the 30 day default value for **CDD** checks.

AML - Training Record

- When updating **AML staff training** records, the **Trained by** field can now be left blank.
- When a trainer is not specified, **Notes** must be added to indicate the training method used.



4.5 Bug Fixes

Bug Fixes

The following is a list of bug fixes in SCM v5.4.6:

- Alt+"*key*" now working on the toolbar buttons
- Case Contacts - the column width of the far left column has been widened to allow for the correct display of double digits
- Excel Reports - Criteria being set on True/False fields no longer returning error
- Excel Reports - where Case Code is set as a runtime criteria no longer returning an error
- Excel Reports - results being correctly returned when running it over a Terminal Server
- Activities integrity implemented to ensure historical/closed items are moved correctly across the database
- Case Codes with hyphens are now accepted on the Time Entry screen
- Case Notes saved as Case Documents creating applied Time Recording entry
- Client Documents can be selected in bulk with actions being applied to all selected documents
- Prompts for UD fields on newly created Cases where document is brought in immediately
- Transactions set to pick up Client/Details/ for the Reference no longer generates error
- Status Date now updating properly after Actioning a Case Step
- Marketing mailing labels no longer produces error if setup is blank
- Apostrophe in Client Type no longer produces error
- Support email address field no longer produces errors if more than 30 chars
- Quill - if the case creation is aborted then the case code no longer remains locked
- Printing from Doc Review now updating Document Status correctly
- Case Document By field now updating correctly following merge from different user
- Case document status now updating to printed if doc printed from Case Doc screen
- Contact e-mail address now updating on case contacts screen if updated in contacts
- where you have Spreadsheets in Case Steps, it no longer produces a File Replace message when Case Step is actioned
- Balances linked to multiple different ud currency fields no longer generate error (max 14)
- Can now enter the + symbol in the user record mobile number field
- Email - Content no longer missing when using forward/reply during add email to case
- Creating a new UD field of type List or Dropdown, the buttons OK/Cancel are no longer obscured
- Client Document Templates no longer produces error when no templates are listed
- You can now enter a forward slash character in Case contact Reference field
- Allow saving of note as Case Documents now holding colour code
- Mapping User Field for Laserform - Contact Company name now pulling through
- Attach a case doc with ? in the description to an e-mail no longer produces an error
- Case Ledger Enquiry now lists all the records in date order
- Document Search feature permission now available
- Attach case doc with long description to a case email no longer produces an error
- Esc Key now closes the Court Maintenance Screen
- Document Search Word Icon updated
- Contact Extra Information now displays Scroll Bars where extensive text is entered
- Editing User Rates without selecting a record no longer produces an error
- You can now email out from Outlook even if the Case is already open
- Types of Business can now be deleted

5 Version 5.4.5

5.1 General

Case Activities - Tasks

- A new feature to **Calculate task dates in working days** has been added to the system. This check-box option can be switched on (or off) from the System settings, Case, General tab.

Case Activities - Hearings

- The default sort order for Hearings is now **Date** and **Time**; with the most recent hearing first. Hearings can also be sorted by any of the other column headers.

Case - Court Details

- The Court Details **Record** field on the main Case screen has been increased from 15 to 20 characters.
- The Court Details **List No** field on the main Case screen has been increased from 10 to 50 characters.

Case - Details

- The maximum number of fields that can be created as UD fields has altered; the new limit is 119 for Access and 888 for SQL Server. This is due to the queries that are ran when calculating expressions, the query can only contain 255 fields and it must include all fields from the Client and SolCase tables.

- In some cases the error "Too many fields defined" may be generated when rebuilding a UD table even when the number of fields defined is less than the maximum, this error will only occur when using a Microsoft Access database and can be resolved by compacting the database.

- The error is caused in this instance when either a lot of fields have been deleted and then recreated or a lot of fields have had the size changed. When a field is deleted in Access, which also occurs when the size of a field is changed, it is not permanently deleted from the table until the database has been compacted meaning the maximum number of fields (255) can be reached when the table appears to contain less fields.

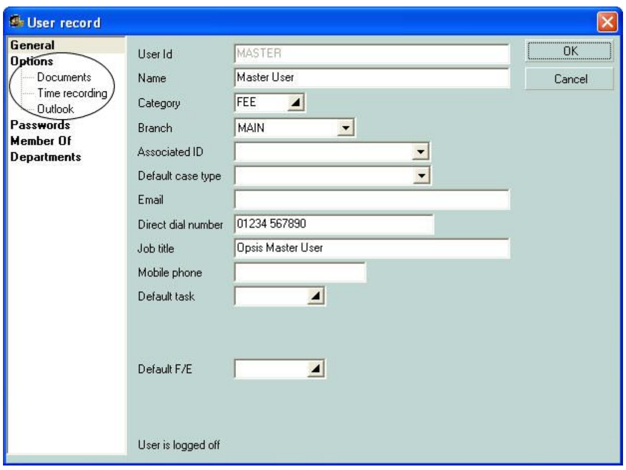
Case - Search

- A new user option has been added to the system to allow the default search field on the **Case search** screen to be the **Case Description** field.

User Record

- Due to the extra functionality in the User record area, the screen has been redesigned to allow it to retain it's size.

- The **Options** tab has been split to contain three sub-tabs; **Documents**, **Time Recording**, and **Outlook**.



Reports

- New functionality has been introduced to allow users to view system usage information. On a daily basis, every user's log in and log out time together with the name of the machine they used is recorded.

- A new **Security** report called **Application usage** has been added, which can be accessed from the **Reports** module or by a new **Usage** button on the **User maintenance** screen. The report can be ran for an individual user or for all users, and a start and end date must be specified.

Case Contacts - Email

- The **Reference** and **Reference Name** information for all contacts on a case is now available when creating the **Subject** line of a case email.

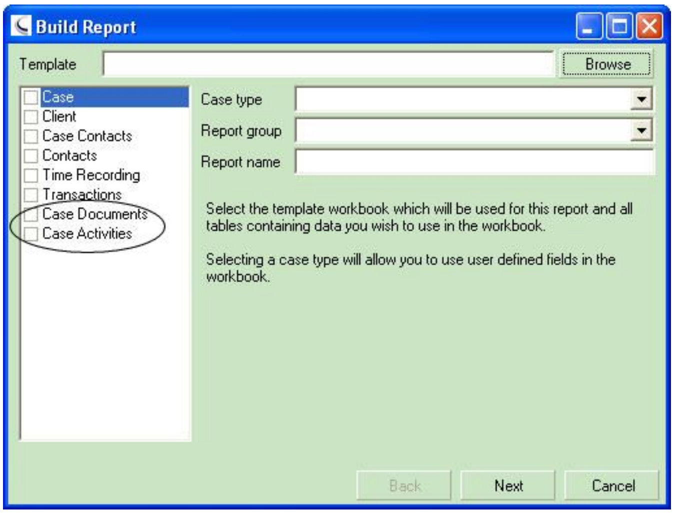
Case - Release Case Lock

- The system has been changed so that when users log in to SCM, any locked cases tied to their login ID will be cleared.

5.2 Excel Reporting

Excel Reporting

- **Case Documents** and **Case Activities** fields are now available for selection in Excel Reports.



5.3 Feature Permissions

Feature Permissions - AML

- Two new AML feature permissions have been added called **Verify client identifications** and **Print client identifications** to restrict users who have access to this area of the AML module. The default setting is for all users.

Feature Permissions - System

- Two new system wide feature permissions have been added called **Open case documents on closed cases** and **Copy case documents on closed cases**. The default setting is for Administrator users.

- A new system wide feature permission has been added called **Delete time records from the Time Records screen**. The default setting is for all users.

- A new system wide feature permission has been added called **View application usage information**. The default setting is for Administrator users.

5.4 LMS

LMS Stars

- Actioning an LMS task early now alters the effective date of all Tasks that follow.
- When an LMS Task is delayed, the total number of days delay is now sent to LMS via the upload.
- Abbey case plans has been implemented for LMS.

5.5 Bug Fixes

Bug Fixes

The following is a list of bug fixes in SCM v5.4.5:

- Word documents created independently of SCM can now be added to more than one case using the **Add Doc to SCM case** button on the OPSIS SCM Word toolbar.
- The **Document Preview** (check-box) option has been removed from the Case Documents tab as it was causing Word 2007 document locking problems.
- Exported time entries on closed cases now correctly changes the record's **Export** status.
- Time records can now be deleted from **Closed** cases.
- An error is no longer produced when saving a time entry with an invalid activity code. Users are now prompted to enter a valid code.
- The keyboard TAB key can no longer be used in the Telephone Timer **Notes** screen; an error is no longer produced when the time entry is saved.
- The data in the **User Defined Details** reports for **Contact Details** and **Hearing Details** is now listed in the correct order.
- Default values specified in UD fields of type **Number** now display the correct data.
- Documents of type **PDF** can now be added to the precedent library as per SCM versions prior to v5.4.3.
- The **Case dates** option has been removed from the Maintenance, Activities menu; this has been superseded by the **Hearings** module.
- New **Contact** codes are now created correctly (ie. 5A3N) for contacts with similar names.
- The words **No longer known at this address** (in red) are no longer displayed when creating new Contacts (where SCM is licensed for the Marketing module).
- The **Inactive cases** report no longer produces and error.
- A message is now produced to confirm successful generation of **Precedent packs**.
- Fields can now be inserted correctly in the Marketing module **Label settings**, and labels are created without producing errors.
- Appointments assigned to **Teams** now correctly write to the team members Outlook Calendars.
- Tasks assigned to **Teams** now correctly write to the team members Outlook Task lists.
- The Case Documents **Print** button now correctly updates the **By** field on the case.
- The SQL query used to retrieve the list of activities for an **LMS case** has been altered to prevent duplicate tasks being displayed in the list.
- The maximum date that can be entered into **Date/Time** fields has been increased to 01/01/9999.
- The Apostrophe (' and `), and the Plus (+) characters are now accepted in the following fields:
  Email field on the **Client search** screen.
  Email field on the **Client** screen.
  Email field on the **Contact register** screen.
  Email field on the **Contact** screen.
  Email field on the **User** screen.
  Opsis Support Email Address field on the System options - System screen.
  Contact reference field on the **Case search** screen.
  Contact name field on the **Case search** screen.
  Reference field on the **Case Contacts** screen.
  Reference name field on the **Case Contacts** screen.
  Notes field on the **Case Contacts** screen.
  Email field on the **Case Contacts** screen.

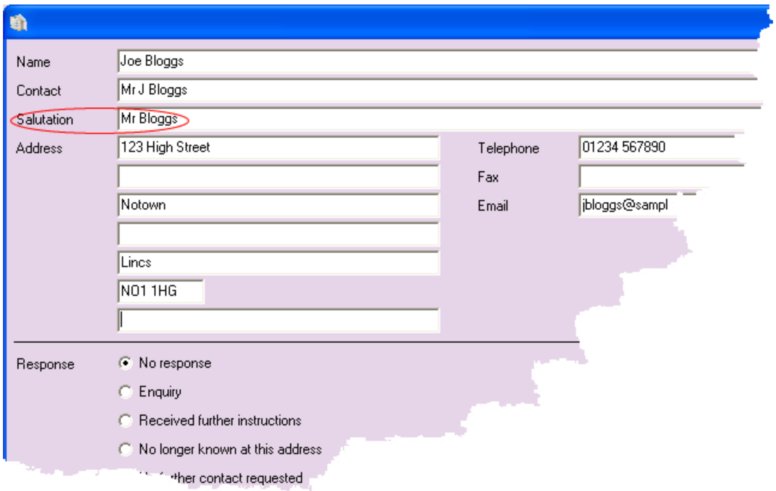
6 Version 5.4.4

6.1 Marketing Module

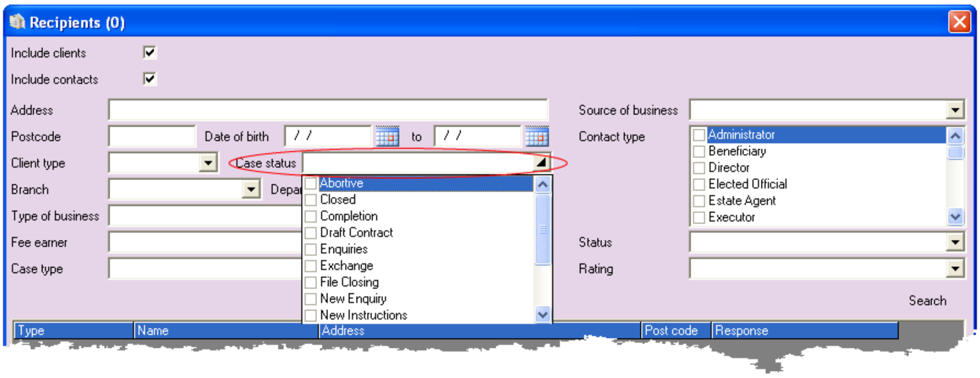
Marketing Module

- A **Salutation** field has been added to the **Recipient** screen.

- The system has been changed so that data in the SCM Client and Contact **Salutation** fields is now passed to the Recipient **Salutation** field to give more flexibility when creating campaign mail shot documents (and mailing labels).



- Multiple **Case statuses** can now be selected when searching for marketing recipients.



- The default sort order for the marketing **Recipients** list is now by client **Surname** (or full contact **Name** if contacts are included).
- This list can now be printed.
- When generating a marketing campaign, the documents are now produced in the same order as the default list order.

- A new **Regenerate** button has been added to the main campaign screen. This re-sets the 'sent' property on *every* recipient record in the list and allows users to repeat the print run.

- If a Client or Contact recipient record is marked as **No longer known at this address**, this information is now visible on the SCM Client and Contact screens in red text.
- When the SCM Client or Contact address is amended the information is removed when saved, allowing the record to used as a recipient in future campaigns.

- SCM Clients and Contacts can now be marked as **Do not mail**. Selecting this (tickbox) option will exclude the client or contact from marketing campaigns.
- The option can be de-selected if marked manually on the SCM Client and Contact records, however if the records are marked automatically (as a result of a campaign) it cannot be removed.

6.2 Bug Fixes

Bug Fixes

The following is a list of bug fixes in SCM v5.4.4:

- An error is no longer produced if more than ten characters are entered into the **Postcode** field of Client or Contact records used as recipients in a marketing campaign.
- In the Marketing **Label settings** screen, fields from the drop-down selection can now be inserted anywhere in the list.

7 Version 5.4.3

7.1 General

Case - Fee Earner

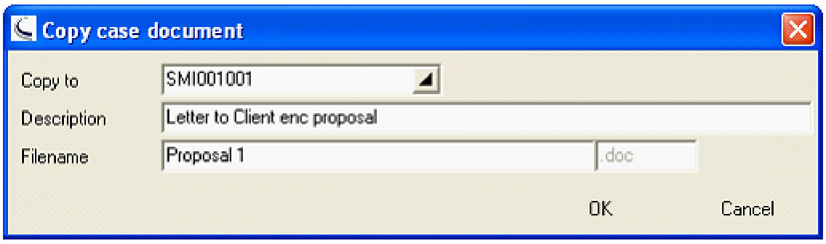
- The system has been changed to allow for a specified default Fee Earner (or Team) to be used for new cases. This option has been added to the **General** tab of the **User** record.

Time Recording - Option

- A new **User** option has been added to allow new time entries to default to the Fee Earner of the case.

Case Documents - Copy

- When copying case Documents, in addition to selecting a different case and amending the **Description** field, the actual **Filename** can now be changed at this stage. This will mean that documents can be more easily identified from the name displayed in the Word title bar.

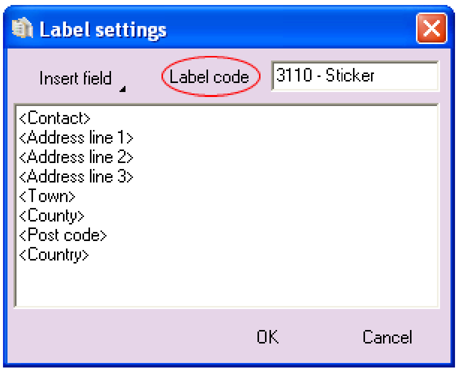


Hearings

- The **Hearings** udfield description column width has been widened to twice the previous size to allow for lengthier **Hearing details** descriptions.

7.2 Marketing Module

Marketing Module



- The **Contact** and **Country** merge fields have been added to the **Insert field** drop-down selection list.
- The caption for the MS Word label code has been changed to match the selection lists in MS Word.
- A new **Feature permission** has been added for the Marketing module - **Alter marketing label settings**.

Two of the Marketing module **Feature permissions** have been re-worded to include the word **Marketing** - making it easier to set all twelve features in one session.

The system has been changed so that data in the SCM Client **Contact** and Contact **Name** fields is now passed to the Recipient **Contact** field to give more flexibilty when creating campaign mail shot documents.

7.3 Bug Fixes

Bug Fixes

The following is a list of bug fixes in SCM v5.4.3:

- A field named **Merge** in the **ContactType** table has been renamed to **MailMerge** as the word MERGE is now a SQL server 2008 reserved word.
- Contact udfield data is now correctly transferred from the Contact record when the contact is added to a case.
- An error is no longer produced when a case step containing Legal forms is activated.
- A problem related to the **Use date stamp folder** option has been fixed - case documents can now be printed using the **Print** button on the **Documents** tab.
- Time recording **User rates** are now picked up when used with the activity options on the **Time Recording options, Activities** tab (Email and Telephone call), plus case document auto-charging.
- In the Marketing module, amended recipient responses are now automatically displayed on the **Recipients** window when selected (and saved).
- When adding individual Marketing recipients (using the green **+** button) to a campaign, the data is now displayed correctly in the grid.
- When creating a new precedent with an incorrect file extension, **pdf** has now been removed from the dialog box which states the allowable file types.

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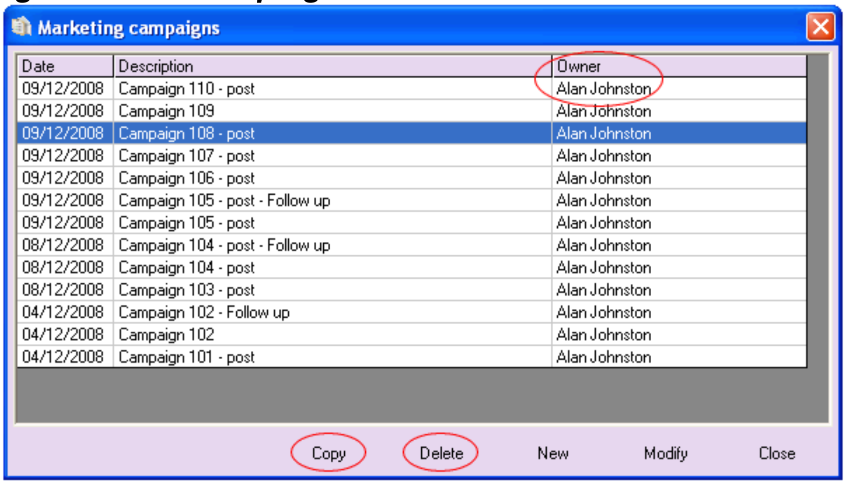
8 Version 5.4.2

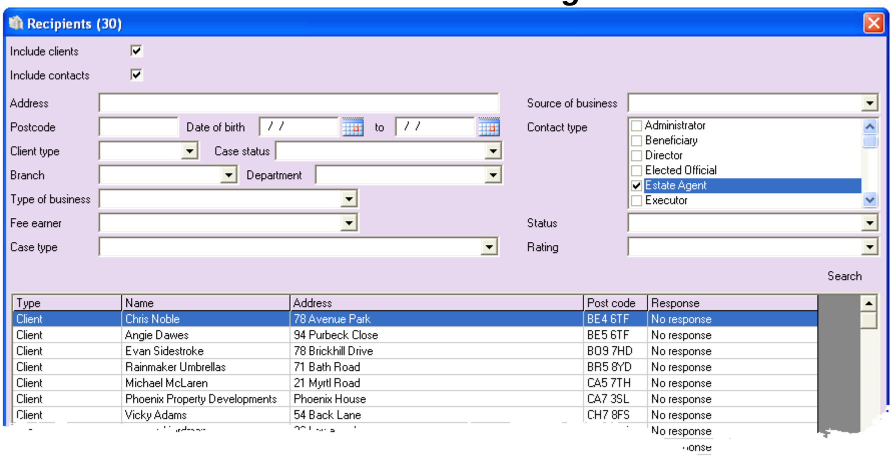
8.1 Marketing Module

Marketing Module - Campaigns

- Campaigns can now be **deleted** from the main Marketing campaigns screen. By default this function is only available to Administrator users.
- The user who created a campaign is now stored with the campaign record, and is displayed as the **Owner** for each campaign.
- A new **Copy** button has been added to the main Marketing campaigns screen. This has replaced the *Follow up* button on the individual campaign screens.



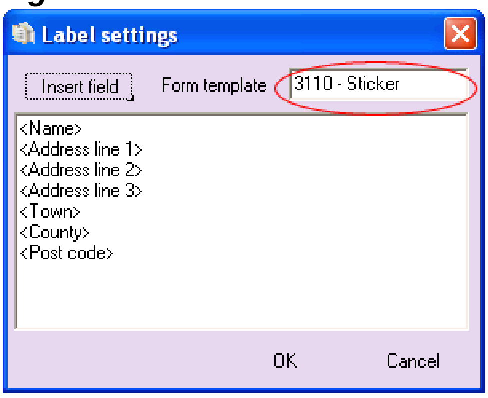
Marketing Module - Search Criteria



- Multiple **Contact types** can now be selected on the Marketing recipients search screen.
- A column containing the **Post code** has been added to the campaign recipients list.
- The Marketing recipients **search** options have been expanded to include more client, case and contact information. These are as follows: Date of Birth / Client type / Case status / Branch / Department / Type of business / Contact Status / Contact Rating.

Marketing Module - Mailing Labels

- The ability to create **Mailing labels** when generating marketing documents has been added.
- **MS Word labels** can be specified and populated with fields inserted from a list.



8.2 Bug Fixes

Bug Fixes

The following is a list of bug fixes in SCM v5.4.2:

- When opening an **Other User's Folder** in a new window in Outlook 2002/2003/2007, the OPSIS addin toolbar is no longer removed from the original user's window.
- When selecting recipients from the SCM Contacts address book in Outlook 2000, the email address is no longer preceded with SMTP, and emails are now sent and received correctly.
- If you allocate a time recording activity code to an email added to a case, a duplicate posting is no longer created when the email is subsequently opened from the case Documents tab.
- Marketing campaigns are now displayed in strict order of creation on the main Marketing campaigns screen.

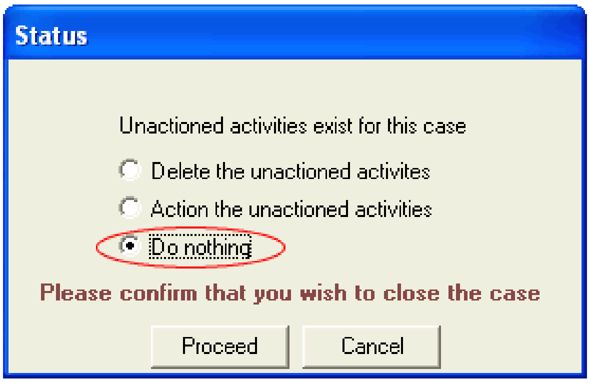
9 Version 5.4.1

9.1 General

Case - Contacts

- Contacts can now be added to cases that have been opened as **Read-only**.

Case - Close



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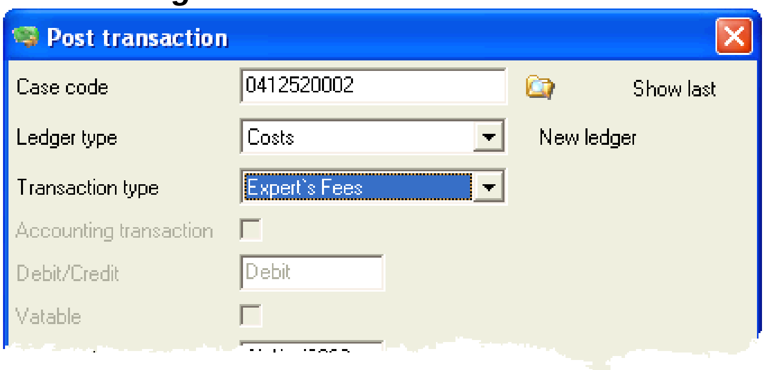
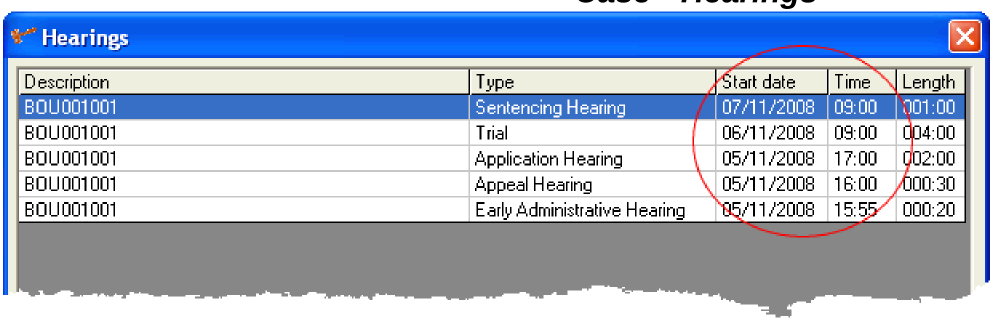
- When closing cases, a new option has been added to the **Status** dialog.
- If **Unactioned activities** are found when closing a case, users have the option to select **Do nothing** before proceeding.

New Ledger

- A new button has been added to the **Post transaction** screen.
- **New ledgers** can now be created from the Transaction posting screen.



Case - Hearings



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- When viewing the list of **Hearings** within a case, the order in which they are displayed is now by **date/ time**.
- The most recently added hearing is displayed at the top of the list.

Cheque Request

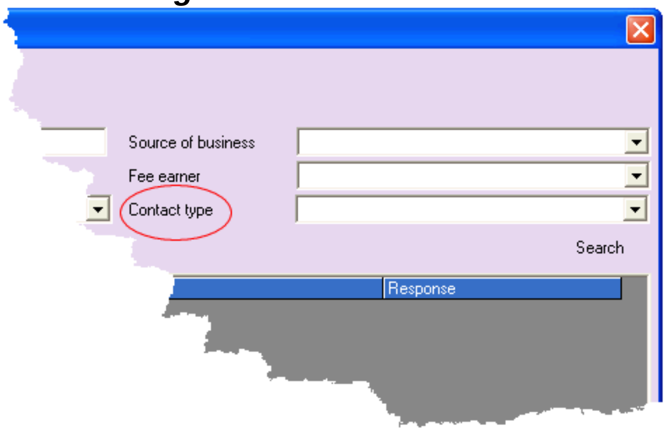
- When posting a **Cheque request** via Millennium Accounts, the *prompt* to add a reference has been removed.

Reports

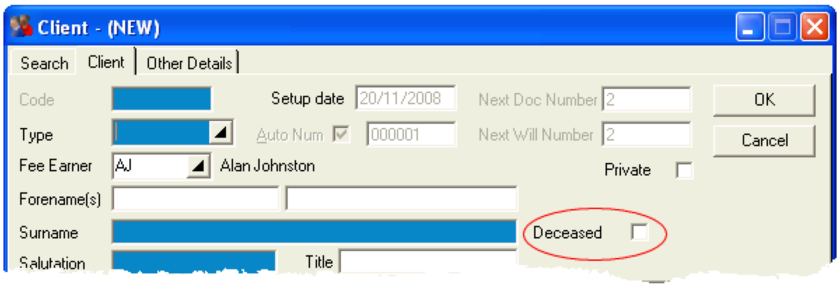
- The **Document time and content analysis** report has been changed so that all documents are shown on the report, and the start time and end time to be included where relevant.

9.2 Marketing Module

Marketing Module



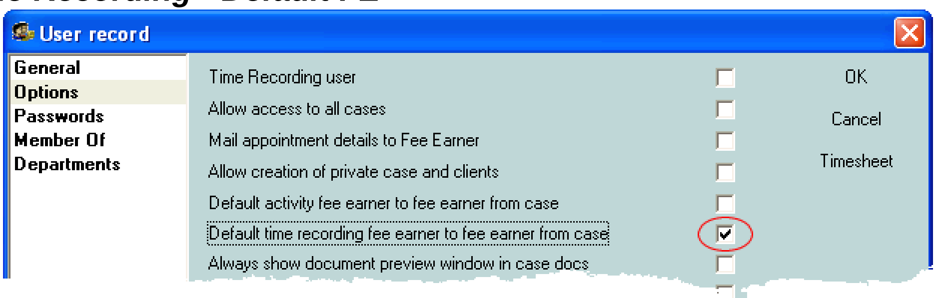
- When selecting recipients for a marketing campaign, the search can now be refined by SCM **Contact type**.



- A new **Deceased** check-box has been added to the SCM **Client** record.
- Marking a client as deceased will exclude the client from any marketing campaign recipient searches.

9.3 Time Recording

Time Recording - Default FE

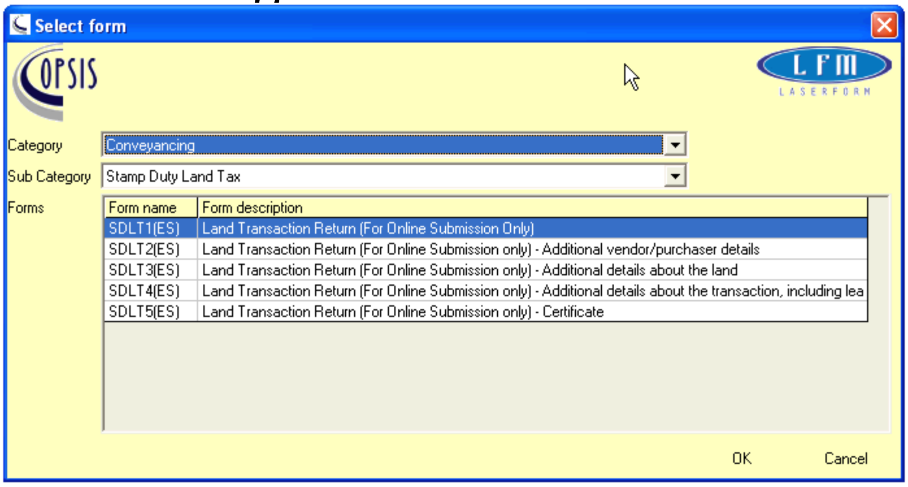


- A new option has been added to the SCM **User** record options screen.
- Time can now be recorded for the Fee Earner on a case instead of the user that is logged in.

9.4 Legal Forms

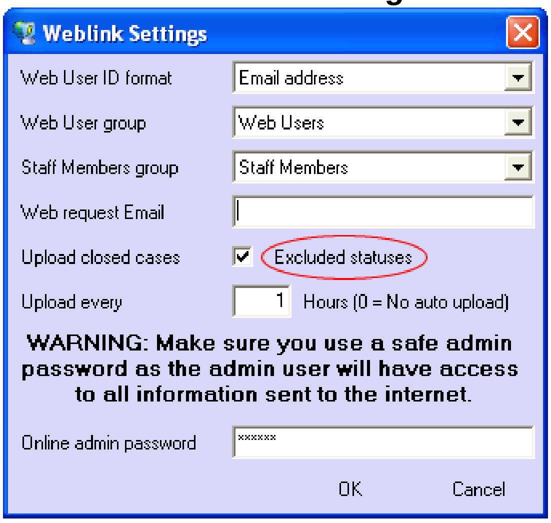
Laserforms - eSubs Application

- SCM has been changed to allow integration with Laserforms' eSubs application.
- The **SDLT1(ES)** form can now be selected and merged with SCM data.



9.5 Weblink

Settings - Excluded Statuses



- The Weblink settings have been modified for the selection of **Excluded statuses**.
- This will prevent the upload of cases to the Weblink server based on the status of the case.

Auto Upload

The Weblink **Auto Upload** service will now refresh the upload interval after each upload is complete allowing the interval to be changed without having to restart the service.

9.6 Bug Fixes

Bug Fixes

The following is a list of bug fixes in SCM v5.4.1:

- Re-opening case emails no longer produces an error.
- Adding Word documents to a case created outside of SCM (where a document with a similar name already exists), no longer creates invalid document extensions.
- Viewing the **CCD** record for a client of type **Company** no longer produces an error.
- When printing case emails, a list of attached case documents is now included.
- When opening an **Other User's Folder** in a new window in Outlook 2000, the OPSIS addin toolbar is no longer removed from the original user's window.
- If SCM is licensed for the **SMS** module, an OLI error is no longer produced.
- **Contacts** added to locked cases can now be re-positioned using the **Up** and **Down** buttons.
- When running multiple timers and switching between them, the **Gap** is now recorded for *all* the timers, and the entries on the **Timesheet** are colour-coded yellow.
- When **Other** documents are imported into a case, the **OK** button on the Case Documents dialog can now be selected using the **Spacebar** or **Enter** key without producing an error.
- The **Case Definition** screen can no longer be closed while editing a **ud Field**, preventing an error from being produced.
- When sending a case email with an address which is not listed in Outlook address books, and adding it to case Documents, the email is now sent, listed correctly on the Documents tab, and an error is no longer produced.
- Converting a case **Document** to a case **Email** from MS Word no longer locks the document.
- When converting case documents of unsuitable file types (eg. XLS, MSG, TIF) to **PDF**, appropriate warning messages are now in place, and the resultant conversion now contains the correct Table of Contents.
- Opening, editing and closing of non-SCM Word documents no longer produces a Final Form error.
- When **Show full description** is selected on the **Time Ledger Enquiry** report, full notes (of over 255 characters) are now included.
- All Ledger Transactions of the same amount posted on the same date are now included in the Audit Trail report.
- The currently selected row and column is re-selected when the date is changed in the Diary manager.
- When **Store court information** is selected for a case type, and that case type is set as **Default case type** for a user, the **Court details** area on new cases is no longer missing.
- Laserforms v9.2.5 or above is required to prevent the process from remaining when case forms are closed.
- When changing the case type of a case, the original ud fields record is now deleted from the case type table.
- No more than ten characters can now be entered in the **Institution Type** field on the (AML) **SOCA Contact details** screen. The number of characters has been restricted due to the size of the field on the SOCA form.
- When cases are marked as **SCM Marketing Campaign** as SOB on the **Other Details** tab, the **Received further instructions** data is now passed back to the marketing campaign record.
- Fields of type **Date** and **Currency** used in marketing search criteria no longer produce errors.
- Fields of type **Number** used in marketing search criteria no longer cause display problems.
- The **Received further instructions** marketing response wording has been standardised throughout the module.
- Modifying the **Contact** field on the marketing individual recipient screen no longer produces duplicate data.

Index

- B -

- C -

- E -

- F -

- H -

- L -

- M -

- R -

- T -

- U -

- W -

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