Modification as at release 11.00.06
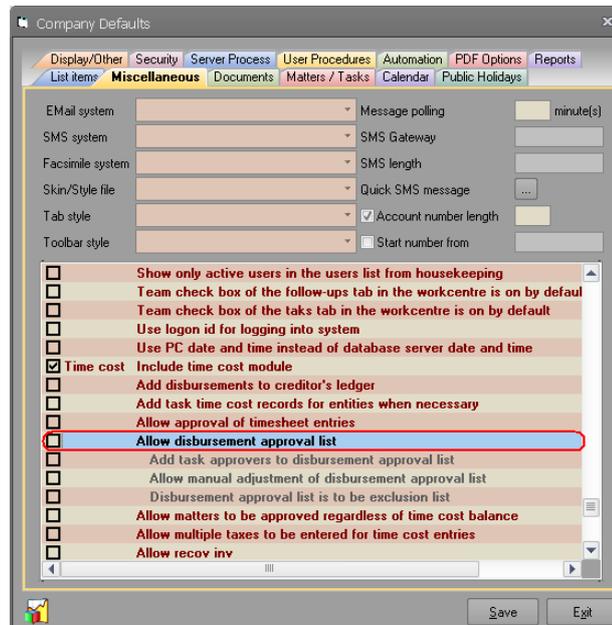
1) We have added a new feature that allows sites to allow/disallow a list of staff from approving disbursements at the matter level. This feature can be set up as follows.

    You can turn this feature on/off from the time cost section of the company default using the highlighted option.


    Once this setting is turned on, you can specify how the staff list can be built. You can set the system to automatically add the task approvers to this list. This can be done by turning on the following option as highlighted below.
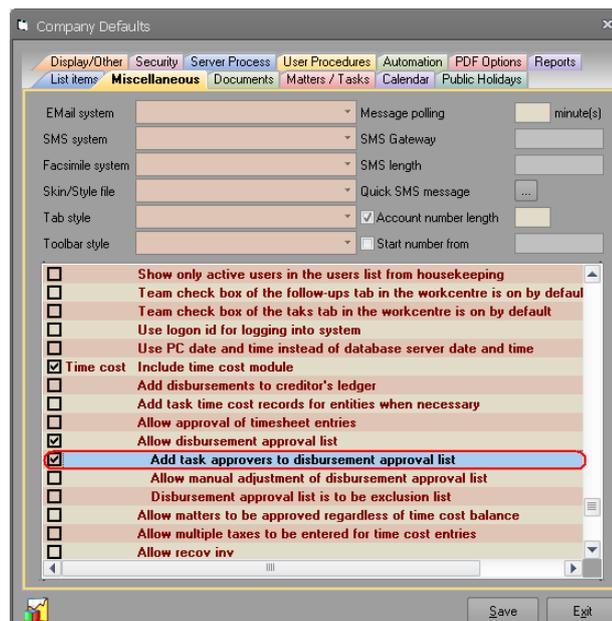
By doing this, task approvers will automatically be added to this list. Please not that teams are not processed as part of this feature and hence they will never be added to this list. Please also note that by setting a team as the approver, this feature will not add the members of the team to this list. One can also allow this list to be manipulated manually. This can be achieved by turning on the following option as highlighted in the image below.
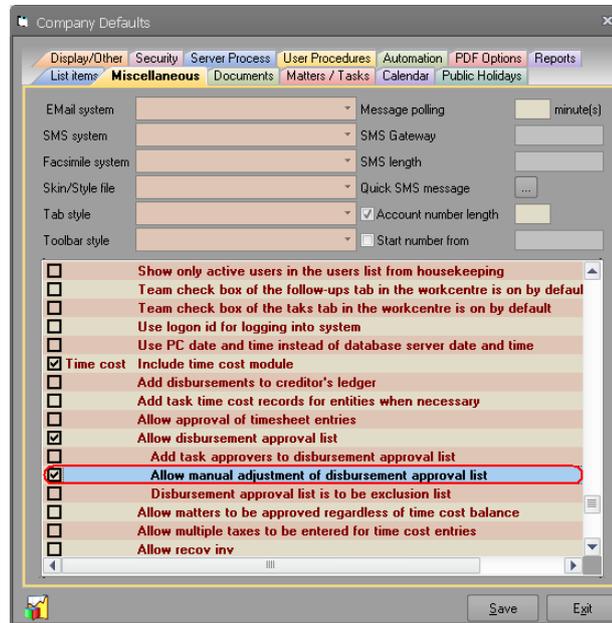

When either of these options are turned on, one can specify whether this list to be treated as an exclusion or inclusion list using the following option as highlighted in the image below.
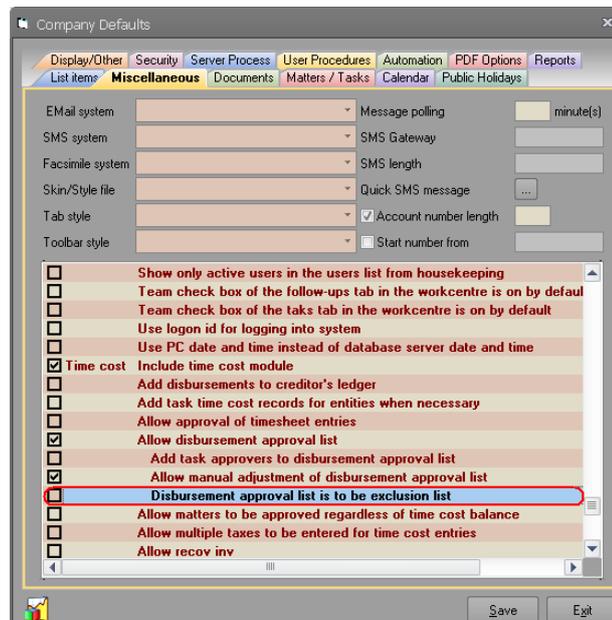

The list by default is considered as inclusion list, that is, only staff listed here are the ones that can approve any disbursement on a matter. You can turn this

list to exclusion list by turning on the above setting. In this case, staff listed here will not allowed to approve any disbursements on a matter.

As indicated above, if sites would like to control the staff populated in this list, they can turn "Allow manual adjustment of disbursement approval list" setting. Once this is done, you can specify a security group at the matter type level which indicates who is allowed to manipulate this list for that matters of that type.
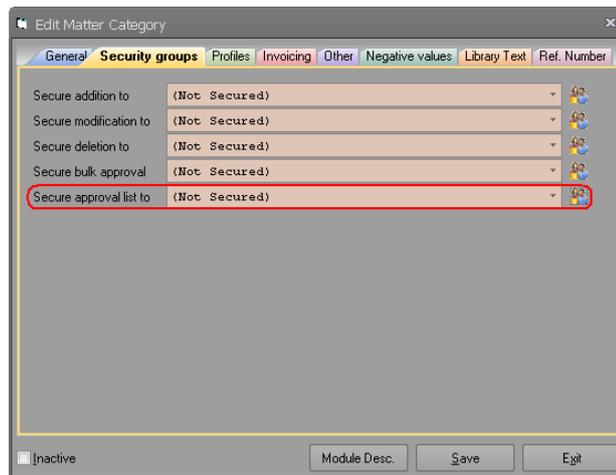

When this setting is turned on, in the matter edit form, users will see a new tab called "Disb. Approval". This tab will list all the users that are currently in the disbursement approval list. Users in this security group can manipulate this list as they wish.
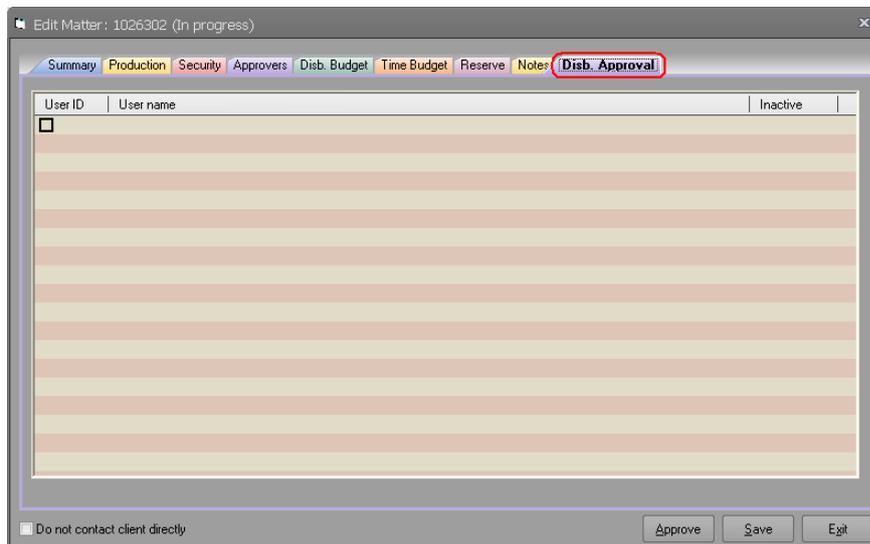

The disbursement approval process has now been amended to consider users in this list. If the list defined as exclusion list, users in this list will be prevented from approving disbursements even if they all other business rules. If the list is defined as inclusion list, only users in this list can approve disbursement if they pass other business rules.

When the disbursement approval list is defined as exclusion list, the "Disbursements for approval" option will display a new user drop down called "Excluded for". Selecting a user from this drop down will display all disbursements that selected user is excluded from approving.
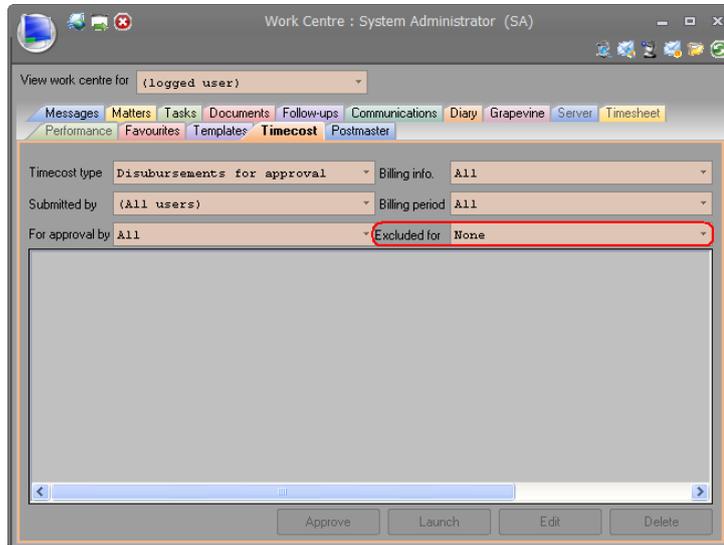

2) We have fixed a bug in importing queries. The queries were not being imported in the right sequence.

3) We have added a check box to the profiles tab of the Ad-hoc enquiry form. This check box allows users to specify whether they want clients to have all or any of the selected profiles. When this check box is selected, clients that have any of the selected profiles will be included in the result set. With this check box, the client must have all the selected profiles before they are included in the result set.
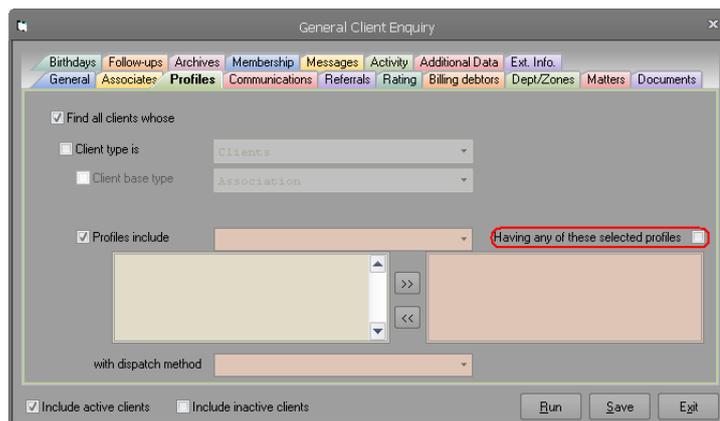

4) We have enabled the transfer button to perform bulk transfer of data for multiple clients in one go. The bulk client transfer is only available when there is no client selected in Client Control Centre. When a client is selected, the transfer button will behave as before and only transfer data from the selected client to the one specified in the transfer form.

To perform a bulk client transfer for multiple clients in one go, follow these steps:

- Create a database table with two columns called FromClient and ToClient. This database can be a simple excel file with two columns, a DBF table with two fields, tab delimited text file (txt) with two columns, or a Microsoft Access MDB table with two fields. Populate this table with the primary key (UniqueID) from the ZZCLIENT table for the client that you want to transfer from (FromClient) and for the client that you want to transfer to (ToClient).
- Clear the Client Control Centre first by deleting the content of the client identifier field and then tabbing out of the text box and then click the transfer button.
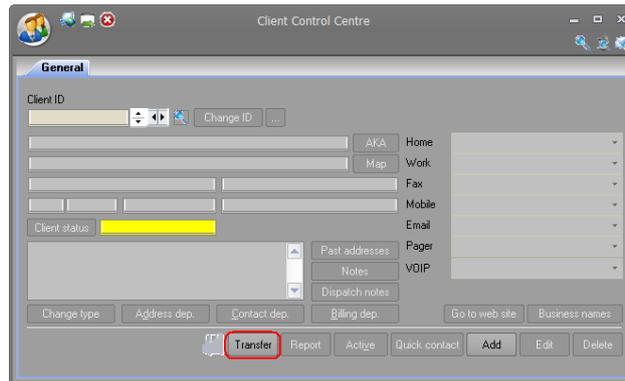
- You should get a file explorer window where you can navigate to your database. Select your file and then click open.
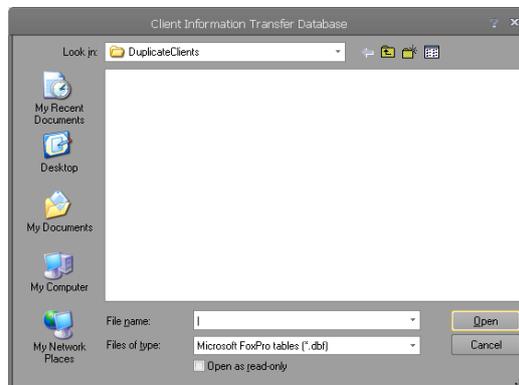

- Usually data transfer is done because you have duplicated clients and you may want to consolidate them and then delete one. To provide you the ability to delete the client after the successful transfer, Synergy will ask you whether you want the clients to be deleted after the successful transfer.
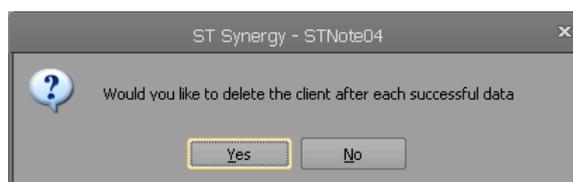
- Once you have decided whether you want the clients to be deleted or not, the usual client data transfer form will be displayed. Please note that the client selection controls will be disabled in this case. Select the options that you need and then click the save button. This would start the process and transfer data from "FromClient" to "ToClient" specified in your database. As usual, you will be notified if there were any errors or data could not be transferred.



- The first time that data cannot be transferred or an error is happened, you will be given the option of stoping the process or continuing on.
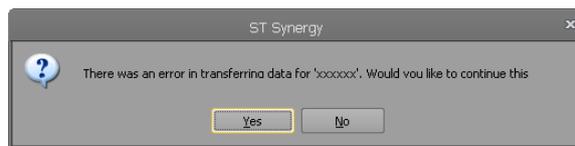
5) Added more ribbon themes to the application.
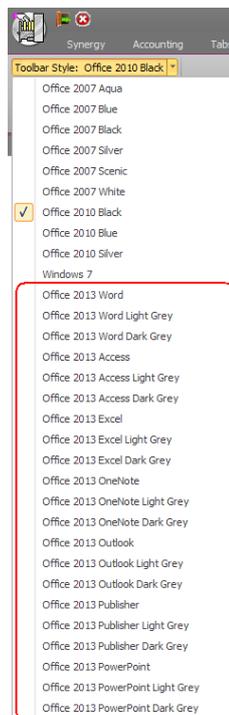
6) Sometime users access properties of a timesheet entity from the timesheet form and change the comments. When the properties form is saved and closed the comment field of the timesheet entry will not be correct. Synergy now detects whether the comments has changed and if so, it will ask the user whether s/he wants the comments to be refreshed.
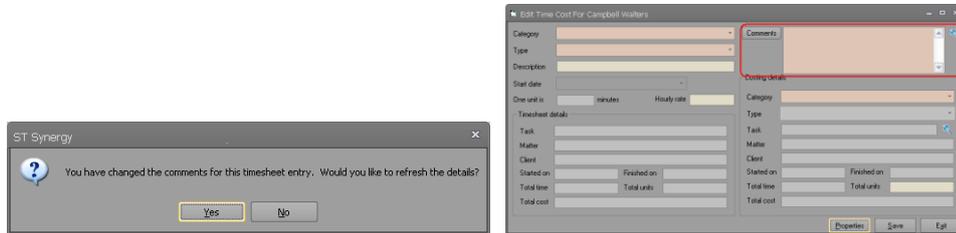
7) We have added an activity dropdown to the Enquiry form. This will allow users to filter the listed user in the user drop down.