

# ESILAW 2012.2.0

## Release Notes



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### IMPORTANT!

The ESILAW 2012.2.0 update contains a number of resolutions to issues reported through the recently added error reporting feedback tool. We recommend that you download and install this update if you are encountering any technical issues or errors as we have resolved a number of reported issues, which improve overall stability.

### **New for 2012! ESILAW Lawyer Desktop**

ESILAW Lawyer Desktop is a new application developed for lawyers and timekeepers in the firm. It features the core tools that lawyers and timekeepers use on a daily basis such as calendaring, contact management, and time entry in a simple, easy-to-use interface. The existing Timetracker application has been fully integrated into ESILAW Lawyer Desktop and enhanced with additional time tracking features.

For firms currently using Timetracker, note that Timetracker will be replaced with ESILAW Lawyer Desktop when you upgrade, and a new desktop icon will appear. The default Timetracker window however, will display when you launch ESILAW Lawyer Desktop for the first time.

ESILAW Lawyer Desktop provides the following features:

- Clients & Matters
  - Use this feature to lookup information on clients/matters, similar to the original Timetracker Inquiry feature.
- Contacts
  - Keep track of contact information for people associated with clients/matters and vendors/ suppliers, as well as personal contacts.
- Conflict Search
  - Easily search client/matter and opposing party information for possible conflicts of interest.
- Calendar, Appointments and Tasks
  - Manage appointments and tasks, relate them to clients/matters, and post time entries from them. Calendars can also be easily shared among staff members.
- Timetracker
  - A 'New Time Entry' button has been added to the toolbar to allow you to save an existing time entry and create a new one in a single step. This will help users move between time entries more rapidly. If the existing entry is incomplete it will not be imported into ESILAW until such time that it is marked as complete, based on the validation settings in Preferences.
- Create Document
  - Use this feature to create legal correspondence, letters, envelopes and other documents using customizable Microsoft Word templates. Templates must first be created using the Create Document Template feature in ESILAW.
- Outlook Export
  - The Outlook Export allows you to export clients/matters, contacts, and appointments and tasks to Microsoft Outlook.
- Mobility options for ESILAW Lawyer Desktop
  - If you're looking to go mobile you can leverage the power of applications such as Wyse PocketCloud to take your desktop with you on mobile devices such as tablets and smartphones.
  - Visit [http://www.esilaw.com/ldesktop\\_videos.asp](http://www.esilaw.com/ldesktop_videos.asp) to learn how to go mobile with ESILAW Lawyer Desktop. Note that Wyse PocketCloud is not included with ESILAW or ESILAW Lawyer Desktop and must be purchased separately.

For further information on ESILAW Lawyer Desktop watch the introduction video at [http://www.esilaw.com/ldesktop\\_videos.asp](http://www.esilaw.com/ldesktop_videos.asp).

## **Enhancements to Trust Transfer to Pay A/R and Release Trust Transfers to Pay A/R**

Several enhancements and changes have been made to the Trust Transfer to Pay A/R, Release Trust Transfers to Pay A/R feature, and screens and reports that display these transactions.

- 'Release Trust Transfers to Pay A/R' feature has been renamed to 'Write Trust Transfer Checks'.
- The Inquiry feature was modified to display the following:
  - Additional detail including client/matter name and number for trust transfer transactions.
  - Additional detail such as payee, bank and check number now display in the description for Trust Transfer to Pay A/R transactions if a check has been written to finalize the transaction. This information displays in Inquiry and also displays on corresponding reports.
- A warning message was added to Write Trust Checks to warn users if an outstanding Trust Transfer to Pay A/R Transaction is pending for a selected client and bank. Note, it is important that you do not use Write Trust Checks for processing Trust Transfer to Pay A/R transactions. You must use the 'Write Trust Transfer Checks' feature to process these transaction correctly.
- A display message was added to indicate that there are outstanding Trust Transfer to Pay A/R transactions pending. This message displays to all users with access to Write Trust Transfer Checks when the user logs in to ESILAW.
- Several reports including the Bank Journal, Check Register, Outstanding Check Register and Outstanding Check List were enhanced to include additional information on checks related to Trust Transfer to Pay A/R transactions. Information such as the check number and the client/matter name and number now display, as well a detailed breakdown if a single check is written on behalf of multiple clients. This was done to facilitate easier tracking and auditing of Trust Transfer to Pay A/R transaction details throughout ESILAW. The same information displays on corresponding transaction audits.

### **A/R Exception Report Set Aging Categories Option**

A new option was added to allow users to set custom aging categories on the A/R Exception report. Users can now define their own aging categories by selecting 'Set Aging Categories'.

### **Clickable E-mail Addresses**

The ability to click on e-mail addresses throughout ESILAW was added in order to open the default e-mail application and insert the 'to' e-mail address, allowing users to send e-mails more quickly.

### **System Balance & File Health Report**

A new verification report was added to the System Balance & File Health report to display additional information related to balances if the client and G/L ledgers do not balance.

### **Additional Enhancements and Bug Fixes**

- Removed the Post and Print Check options in Create Bills. If you are applying payments to bills in Create Bills from trust accounts you will now need to use the Trust Transfer to Pay A/R feature or Write Trust Transfer Checks, depending on the options you select when billing. You can no longer process the checks from Create Bills. Note that you can still apply trust payments to bills and print client receipts, but trust payments that you have applied will queue in 'Write Trust Transfer Checks' so that you can process the check for the transfers afterwards.
- Modified the interface to allow reports to maximize to full screen to increase the viewable space of reports on screen. This is ideal for users with lower display resolutions or larger Windows font settings.
- Increased the size of all Bank Reconciliation Adjustment forms to make it easier to read description detail.
- Increased the length of address fields for clients and matters and vendors to accommodate more information.
- Replaced the Notes feature in contacts with the same Notes feature as Clients & Matters to allow entry of notes with a date, timestamp and user name.
- Added a sort by date option to the Invoice Journal report.
- Updated the integrated error reporting feedback tool to provide more information on the cause of errors to help improve troubleshooting and expedite faster resolutions to issues via hotfixes.

- Added a 30-day reminder to remind users to run the Rebuild Index feature. This displays to administrators only.
- Added an option in System Settings to disable the display of the audit prompt that occurs after posting transactions.
- Added a warning message that displays if UNC mapping has been used with ESILAW on a network as UNC drive and folder sharing can cause issues with ESILAW. This will not prevent you from logging into ESILAW if you are using UNC mapping, but will warn you each time you login. Shortcuts that link to ESILAW should always point to a physical drive letter (e.g. f:\esilaw) and not a UNC mapping (e.g. \\server\esilaw)
- Addressed an issue with the Individual Time Summary report whereby incorrect budget numbers would display if the report was run with the Group Inactive option selected.
- Updated the User Settings screen and removed options that were no longer applicable. Also removed the option in User Settings to allow users to hide the Sidebar due to a global change in the user interface.
- Changed Inquiry button labels from WIP Time and WIP Disbursements to Unbilled Time and Unbilled Disbursements.
- Updated invalid Need Assistance links with the correct links.
- Replaced the Navigator links at the bottom of all navigators with three primary links; Support Center, Knowledgebase and Need Support. Need Support allows users to submit non-critical support requests through the internet without having to call support by phone.
- Fixed an issue with Help not displaying in Google Chrome due to Chrome security settings.
- Updated Help to display when F1 is pressed.
- Fixed an issue where ESILAW would not load if a window with a title similar to the company name specified in ESILAW was already open.
- Modified the LSAB export tool to force entry of Law Firm ID and Upload Location prior to being able to upload data.
- Modified the A/P Aging report to correct a problem where an incorrect date displayed as the Posting Date on the report.
- Resolved several errors that were commonly reported through the error reporting feedback tool in order to improve overall application stability.