LexisNexis®

Lexis Affinity Library

Version 4.0

Enhancement Notice

Prepared for Release Documentation

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Copyright Statement

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Notes

1. Important Information

Depending on the version of Lexis Affinity you are upgrading from, there are some important features you may need to consider prior to upgrading to Lexis Affinity 4.0.

Subscription Expiry of Certificates

From Lexis Affinity 2.6 build 4 onwards, subscription licensing has been enforced. Firms upgrading from a version earlier than this to Lexis Affinity 3.0 should contact the LN Helpline on 1800 999 906 to check if their certificate dates are still valid prior to upgrading to Lexis Affinity 3.0. In some circumstances, a new certificate may need to be issued.

Exchange 2010 and Exchange 2007 SP3

Lexis Affinity Library Version 3.0 is supported for use with Microsoft Exchange 2010 SP1 and Microsoft Exchange 2007 SP1, SP2 and SP3.

Known Limitations

Full Text Search and Global Searching is supported for use with Affinity Servers running Oracle 11G R2 or above.

Customised Reports in Lexis Affinity

With any new version of Lexis Affinity Library, it is possible that field names and table names have changed.

LexisNexis recommend running any report you have that is not a standard Lexis Affinity Library report, to ensure it still works as expected.

The Database Glossary (Financial Maintenance | Reports) can be used to list Table & Field Names.

Users of Lexis Settlement Adjuster

Lexis Affinity Library 2.7 or later is compatible with Lexis Settlement Adjuster version 2.7.2.

Firms using Lexis Settlement Adjuster and upgrading to Lexis Affinity Library 4.0 from a version of Lexis Affinity earlier than 2.7 will also be need to upgrade their version of Lexis Settlement Adjuster.

Users of Lexis Information Manager

Lexis Affinity Library 2.7 or later is compatible with Lexis Information Manager version 2.2.22 build 2253.

Firms using Lexis Information Manager and upgrading to Lexis Affinity Library 3.0 from a version of Lexis Affinity earlier than 2.7 will also need to upgrade their version of Lexis Information Manager.

Support of Oracle 9i

From Lexis Affinity Library 3.0 onwards, Oracle 9i will no longer be supported for both Windows and IntegrITy servers. Clients will be required to upgrade their version of Oracle to a minimum of 10g (32 bit) before upgrading to Lexis Affinity Library 3.0.

Prior to upgrading your version of Oracle, you must ensure that your server meets the minimum hardware and operating system requirements documented in the Lexis Affinity OSCR. This document is available from the Lexis Affinity Library 3.0 DVD, the LexisCare Service Centre website or your LexisNexis Relationship Manager.

LexisNexis Consultants are available to provide professional assistance to upgrade the version of Oracle.

Support of Oracle 11g RDBMS

Lexis Affinity Library 2.7 and above supports Oracle 11g RDBMS (Relational Database Management System).

Prior to upgrading to Oracle 11g R2, you must ensure that your server meets the minimum hardware and operating system requirements documented in the Lexis Affinity OSCR. This document is available from the Lexis Affinity Library 4.0.1 DVD, the LexisCare Service Centre website or your LexisNexis Relationship Manager.

LexisNexis Consultants are available to provide professional assistance to upgrade the version of Oracle.

Lexis Affinity 4.0.1 and above is validated for use with Oracle Database version 11.2.0.3 (32/64-bit).

1.1 New features introduced prior to Version 3.5

This section is intended for use by Firms who are now upgrading from a version earlier than 3.5 to Lexis Affinity Library 4.0.

If upgrading from a version earlier than 3.5, it is **critical** that you read the Enhancement Notice supplied with each version to familiarise yourself with the changes in the software. The following notes describe some of the major features of each version.
Copies of Enhancement Notices for previous versions of Lexis Affinity Library can be found on the Lexis Affinity 4.0 DVD.

1.1.1 Upgrading from Version 2.3

- Modifications were made to the database in order to improve the Timekeeper Bill Summary Report.
- Changes to the General Ledger Budgets - Income Account Budgets are no longer recorded with a negative sign.
- Changes to Super Groups - "Master Client Groups" have been introduced and affect existing groupings.
- The Matter Label template named STANDARD (was LOCUS) **no longer includes** the Bill To details.
- Changes were made to ACN & ABN fields in Name Labels

1.1.2 Upgrading from Version 2.4

- Backup Monitoring was introduced
- Conflict Checker was introduced

1.1.3 Upgrading from Version 2.5

- Multi Party Billing (or split billing) allows multiple parties to be billed from the same matter. The split of the bill can be by percentage or value. Professional Services are required to implement this feature.
- Exchange 2007 Server and Lexis Affinity Integration allows synchronisation of entries made in Lexis Affinity with Microsoft Outlook. Professional Services are required to implement this feature.

1.1.4 Upgrading from Version 2.6

- Auto Saving of Sent and Received Emails was implemented
- Full Text Search introduced
- Office 2010 compatibility (32 bit)
- From version 2.7 onwards Lexis Affinity is no longer supported for use with Microsoft Word and Outlook 2000/2002

1.1.5 Upgrading from Version 2.7

- Exchange 2010 compatibility
- Affinity Reporting and Report Developer
- From Lexis Affinity Library 3.0 onwards, Oracle 9i is no longer supported. Clients must upgrade to a minimum of Oracle 10g 32 bit prior to upgrading to Lexis Affinity Library 3.5.

1.1.6 Upgrading from Version 3.0

- You will need to register the new version of Lexis Affintiy with LexisNexis Helpline.
- The password in Affinity.ini can be encrypted to prevent unauthorised access to your data. Refer to the System Administration chapter in the Administration workbook for further information.

Some of these functions are complex and training of your staff is essential to ensure that the function is used correctly and to its maximum benefit. Training can be arranged by contacting your Relationship Manager.

The LN Helpline is unable to offer assistance, under the terms of their LexisCare service agreement, to users who have not completed the training offered by LexisNexis. If helpline assistance is required for untrained users, charges will be at the standard consulting rate.

2. Lexis Affinity Library Version 4.0 Build Summary

Summarised below is a table containing the amendments included in Lexis Affinity Library Version 4.0. A more comprehensive description relating to the amendments can be found by referring to the appropriate page identified in the table below.

(CRS = Lexis Change Request System).

The symbol in brackets [e.g. (1) next] to the paragraphs throughout this Enhancement Notice refers to the build number for Lexis Affinity Library Version 4.0 in which the enhancement/modification was included.

Build	Lexis CRS Reference	Section	Page	Summary Description
1	26856	Important Information	8	Lexis Affinity 4.0.1 and above is validated for use with Oracle Database version 11.2.0.3 64bit.
1	20125	General	18	“Columns” tab added to PhoneBook, Client & Matter selection screens.
1	23125	General	17	Sorting Columns in grids throughout Affinity.
1	23455	General	42	Search for General Ledger Charts now allows for searching on description without using the “Filter” tab.
1	23683	General	18	“Columns” tab on Fee Batch Entry.
1	25492	General	18	“Columns” tab on “Contacts” tab on Matter
1	26174 27500	General	18	Row Selection introduced on many screens throughout Affinity.
1	25229	General	19	Improved Keyboard Functionality
1	27341	General	17	Ribbons and new icons throughout Affinity.
1	27248	General	17	Tree structure instead of tabs for information on PhoneBook, Client & Matter screens.
1	27631	General	22	Help functions (LexisCare Home Page and Log a Helpline Call) now go directly to the Lexiscare Service Centre.
1	27657	General	22	Oracle version reported in Help corrected.
1	26278	General	23	Global Search introduced.
1	27974	General	21	Icons on Quick Reports have been updated.
1	27238	General	22	Lexis Affinity now uses Delphi XE components.

Build	Lexis CRS Reference	Section	Page	Summary Description
1	27988	General	25	CrystalViewer.exe installation modified.
1	27620	General	22	Help Functionality Online training videos
1	24378	General	23	Full Text Search extended to allow for partial word matches and boolean searches
1	21352	PhoneBook, Clients and Matters	30	New “File Notes” tab for matters.
1	25328	PhoneBook, Clients and Matters	29	Three customisable date fields are now available for each Matter Type.
1	27417	PhoneBook, Clients and Matters	27	Transfer Debtor Contact no longer possible on child bills.
1	27430	PhoneBook, Clients and Matters	29	Double clicking on a Matter Contact now opens the PhoneBook record.
1	12698	PhoneBook, Clients and Matters	28	“Client History” tab to show Fees Billed / Received for current and previous 5 years.
1	21067	PhoneBook, Clients and Matters	31	emPower data can now be included in Conflict Checks.
2	27903	PhoneBook, Clients and Matters	27	Create Merge Files for PhoneBook handles quotes in field data.
2	27869	PhoneBook, Clients and Matters	28	Create Merge Files for PhoneBook will include quotes around fields in header row.
3	28375	PhoneBook, Clients and Matters	28	PhoneBook Filter now show *Type* in full on Filter tab.
3	28053	PhoneBook, Clients and Matters	30	Matter Filter wording amended for “Hold” status on Matters.
1	28108	Safe Custody	33	Report printed from Safe Custody now includes all records selected.
1	25362	Fees	34	Fee Sheet- Up/down arrow can now be used in Type column.

Build	Lexis CRS Reference	Section	Page	Summary Description
1	26576	Fees	36	Fee Template entries when inserted in Fee Sheet displayed incorrect unit description in Fee List and WIP Ledger.
1	27247 27899	Fees	34	Major Fee Sheet enhancements.
1	23060	Fees	35	New Fee Sheet icon displayed in System tray to allow quick access to time recording.
1	27985	Fees	36	Fee Sheet icon in Taskbar is no longer visible if user does not have Launch Clearance for Fee Sheet.
3	28594	Fees	35	Further amendments to Fee Sheet to retain filter settings and date range.
3	28008	Fees	36	Snapshot for Fee Batch Entry now selects the correct program.
1	11828	Bills	37	Sending Bills by Email.
1	26926	Bills	38	Debtors Adjustments now displays from most recent to oldest.
1	27472	Bills	37	Warning message displayed if Last Bill ref is blank.
1	20374	Collections	39	Sending Debtors Letters by Email.
1	27998	Collections	39	Account Rendered Statements and interest amount.
1	20716	Transactions	40	Autogen entries now allow for multiple debit/credit lines.
1	23077	Transactions	41	"Description" field added to the Sundry Batch grid.
1	27119	Transactions	41	The Deposit Date in Investment Receipts is now controlled by the Investment Journal Audit date.
1	27435	Transactions	40	System Check error could result when converting an Anticipated Disbursement and changing the Tax code from/to NOTAX to EXCL or AGENT.
1	27478	Transactions	41	Sundries Import gave error if Sundry Type was blank.
1	27493	Transactions	40	Transfer between Protected and Unprotected trust funds now processes the debit entry first.

Build	Lexis CRS Reference	Section	Page	Summary Description
1	27540	Transactions	40	Special Clearance for receipts and Present Cheque now activated by Shift + F9.
1	27546	Transactions	41	The Account name has been added to the Investment Trial Balance.
1	27912	Transactions	41	Investment Commission journals now reverse correctly.
3	28436	Transactions	41	Paying Creditors for more than one Entity.
3	28388	General Ledger	42	“Print” and “export” options added.
1	27415	Reports	44	The .exe file for the Bills Dispatched report has been renamed.
1	27660	Reports	44	Aged Balances (Classic) report amended when printing by group.
1	27263 27129	Reports	44	Various reports modified to speed up generation of results.
1	27821	Reports	44	Prompted date ranges are now adjusted for Year End process.
1	24975	Lexis Affinity Precedents	45	Email Precedents
1	26774	Lexis Affinity Precedents	45	Lexis Clause Library
2	27833	Lexis Affinity Precedents	46	Alternative Method to Launch Microsoft Word.
1	22831	Scripting	47	emPower Field Builder available in Affinity Scripts program.
3	27803	Scripting	47	Updating Client Records using apInitClientForm().
1	27131	DataForms	48	“Bill” option automatically ticked when adding DataForm Field to a Bill DataForm.
1	24168	Product Integration	49	Exchange Integration – option for one-way synchronisation of PhoneBook records with Outlook contacts.
1	27713	Product Integration	49	Exchange Integration
1	25475	Product Integration	50	Exchange Integration – display of Affinity diary appointments in Outlook Calendar.

Build	Lexis CRS Reference	Section	Page	Summary Description
1	24843	Product Integration	51	Support for Worldox GX2 and GX3
1	24846	Product Integration	59	Static Registry Values for Lexis Email Toolbar Settings
1	26361 21656	Document & Email Features	52	Native Office PDF Support option.
1	27021	Document & Email Features	52	New Version of Lexis Document Ribbon and Toolbar
1	27042	Document & Email Features	55	Watermarks may be used in DM Print Styles with Word 2010.
1	27157	Document & Email Features	55	New Tab in System Settings – Document Management
1	27157	Document & Email Features	55	Document Save Settings stored in Affinity Database
1	22508	Document & Email Features	58	Use Sent/Received date as created date for emails
1	21656	Document & Email Features	58	Append Email Description to file name
1	21656	Document & Email Features	58	Descriptive Names for Email Attachments
1	21523	Document & Email Features	57	Versioning
1	21850	Document & Email Features	56	Document Folders
1	21850	Document & Email Features	56	"Documents" window display modified
1	25196	Document & Email Features	57	Compare Documents
1	27021	Document & Email Features	57	New Lexis Email Toolbar
1	27888	Document & Email Features	58	Adding Emails via AutoAdd – use sent/received date as created date.
1	25640	Document & Email Features	59	Filter for [Select Documents] in Outlook based on subject line metadata.
1	25199	Document & Email Features	60	Streamline Saving Emails and Attachments

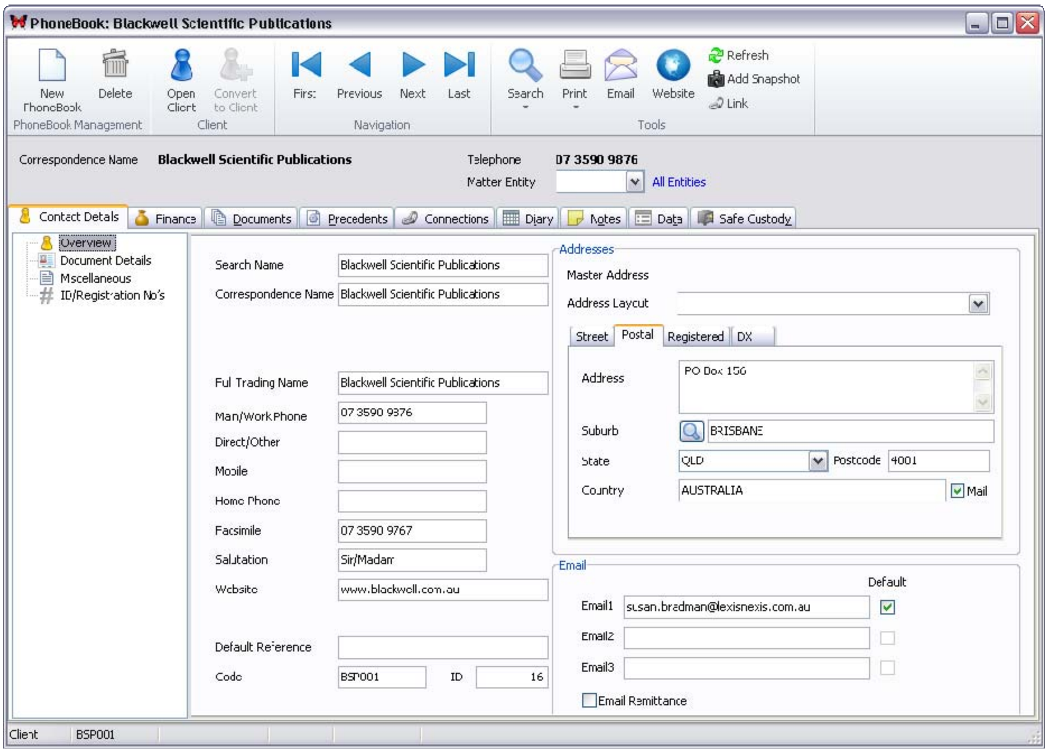
Build	Lexis CRS Reference	Section	Page	Summary Description
1	25014	Document & Email Features	60	Handling of Duplicate Emails
1	22936	Document & Email Features	61	Option to disable document attachment pop-up windows when emailing from PhoneBook or Matter Contact.
1	23319	Document & Email Features	61	Insert Signature on emails generated from Lexis Affinity.
1	25598	Document & Email Features	52	Ribbon Installed if MS Word 2007 or 2010 present
2	27960	Document and Email Features	61	Default Action after Sending Email
1	27492	Foreign Currency	63	In Foreign Currency datasets, the value of Cheques on the "Cheques" tab on the Matter screen could be incorrectly reported.
1	27603	Combined Ledger Systems	64	Transactions / Investments – Posting Commission where trust may be overdrawn amended.
3	28329	Combined Ledger Systems	64	Receipts for Bills with Interest corrected.

3. General

(1) Lexis Affinity V4.0 has a new look incorporating ribbons and new icons.

The PhoneBook, Client and Matter screens have been redesigned to use a tree structure (similar to System) instead of the tabs previously used.

A sample of a PhoneBook entry is shown below:



This version also introduces some features to assist users in displaying the information in a way that better suits their requirements and in their preferred layout. Generally, users can sort data by clicking on Column Headings and select the columns they want displayed via a “Columns” tab.

3.1 Sorting Columns throughout Affinity

(1) Sorting by clicking on a Column heading has been introduced and is available in most programs in Lexis Affinity.

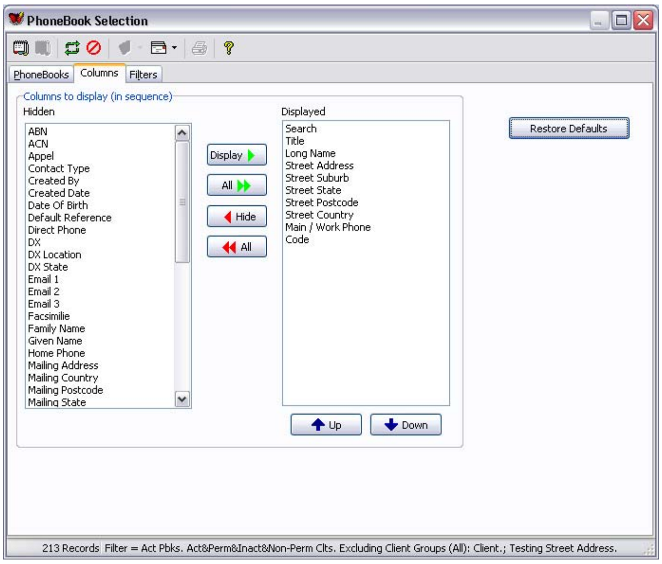
An arrow head will display when the user clicks on the column heading to indicate the results are sorted by that column.
A second click will resort in descending order.

It is also possible to sub sort data by holding the Ctrl key and clicking on a second heading.

3.2 “Columns” tab

(1) A “Columns” tab has been added to PhoneBook, Client & Matter selections screens, the Matter Contacts List on a Matter and Fee Batch Entry.

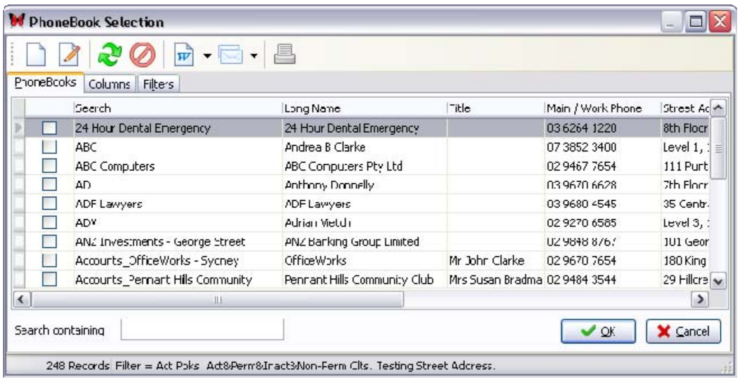
The PhoneBook “Columns” tab is displayed below:



[Restore Defaults] will reset the displayed columns to the Lexis Affinity default.

3.3 Row Selection

(1) New checkboxes have been added to many screens throughout Lexis Affinity. This will make selecting and deselecting rows and performing one action on multiple selections easier and clearer for the user. An example is shown below:



The following guidelines will help users understand the selection criteria.

The term “Selected” means the entry has a tick in the first column.
The term “Highlighted” means the entry is shaded.

You can click anywhere in the first column to select an entry. This will appear as 

If you simply click on a line (anywhere apart from the first column) the entry will become highlighted. Generally the row will appear with a  symbol.

You can use Shift + click to select a consecutive group of entries, or Ctrl+ click to select non-sequential entries. This will automatically select each entry.

You can right mouse click an entry to select it.

Left mouse click does not highlight or select an entry. A double left mouse click will open the entry if this action is applicable.

For actions that only apply to one entry (eg edit) – it applies to the entry that was last selected whether it's ticked or not.

Where a program has a function that has a drop down menu – for example in the PhoneBook | Create merge option, if you select:
Current – it does the highlighted one
Selected – it does the ones with the tick
All – it does all regardless of any ticks

There is also a right mouse click option within the grid to Select All (Ctrl + A) or Select None

If you minimise the screen, the selections will be retained when you maximise it.
If you refresh the screen or select another tab, the selections will be cleared.

3.4 Improved Keyboard Functionality

(1) Keyboard functionality has been greatly improved in this version of Lexis Affinity. Users will now be able to use the following shortcuts in most Affinity programs.

F1	Help
F2	Edit
F3	Open the selection screen (eg: PhoneBook, Client, Matters)
F4	New
F5	Refresh
F6	Reopen last nn records
F7	Reverse
F8	Delete
F9	Shortcuts
F10	Snapshot
F11	Open the matter from a listing
F12	Clear the Filter

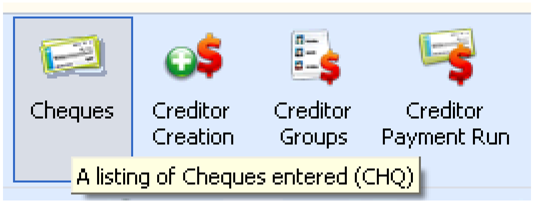
The Video icons can now be activated by:
Note the use of the full stop and comma keys.

CTRL+SHIFT+,	First
CTRL+,	Previous
CTRL+.	Next
CTRL+SHIFT+.	Last

CTRL+P will now print the report that is currently generated by clicking on the printer icon.

3.4.1 Program Shortcuts displayed

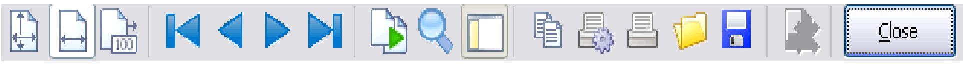
(1) The Shortcut for each program is now displayed in brackets after the Tool Tip for each program.



You can access these by pressing the F9 key.

3.5 Quick Reports

(1) The icons on the Quick Reports screens have been updated.



Zoom to Fit

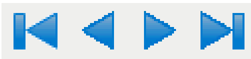
This will display one page at a time.

Zoom to Width

This will widen the display to fill the screen horizontally.

100% size

This will adjust the display to 100%.



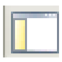
Use these icons to move forwards and backwards through the pages.

Select a page

Use this to move directly to a specified page.

Search for Text

Use this to select specified text.
The text and location of found entries will be displayed on the “Search Results” tab on the left hand side of the screen.



Toggle Tabs

Use this to toggle between displaying and not displaying the “Thumbnails” and “Search Results” tabs on the left hand side.

Copy to Clipboard

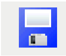
Use this to copy the page displayed to the clipboard. The image can then be pasted into another application.
Note this is an image only – not editable text.

Printer Setup

Use this to select a printer, alter the properties of the printing, (for example to select duplex printing) or to select a page range.

Print Use this to print to the printer.

Open Use this to open an existing saved report.



Save Use this to save the report to a file.

Cancel Not implemented.

3.6 Help Functionality

3.6.1 Web Site Links

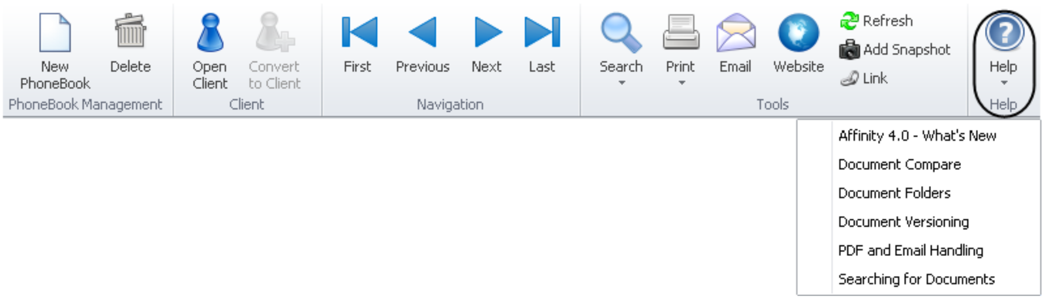
(1) The web site links for LexisCare Home Page and Log a Helpline call have been changed to take you directly to the LexisCare Service Centre

3.6.2 Online Training Videos

(1) The Online Help functionality has been extended to now include some training videos.

A “What’s New” topic has been included for each of PhoneBook, Client, Matter, Document Management Admin, Document Management and Fee Sheet programs. Additionally, PhoneBook, Client, Matter and Document Management programs also contain separate videos on Document Compare, Document Folders, Document Versioning, PDF and Email Handling and Searching for Documents.

These videos can be accessed by clicking on the drop down arrow on the ribbon.



The Online Training Videos provide useful information on specific features of Lexis Affinity Version 4.0

3.7 Oracle version reported in Help

(1) The method of determining the Oracle client version as shown in Affinity | Help | About has been modified and will now return the correct information.

3.8 Delphi XE

(1) Lexis Affinity has been upgraded to Delphi XE components.

3.9 Full Text Search

(1) Full Text Searching has been extended to cover partial word matches and Boolean searches.
The searching functionality is the same as noted under “Global Search” in the following section.

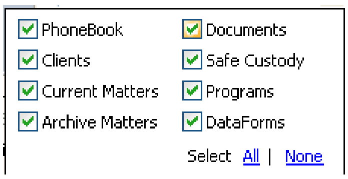
3.10 Global Search

(1) Global Search extends the functionality of Full Text Search and can search the database (PhoneBook, Client, Current and Archived Matters, Safe Custody, DataForm records and Program names) for matches. Partial word matching is catered for.

Global Searching must be enabled in System | Documents | Full Text Searching.

A new Search box will be displayed on the Lexis Affinity desktop.

Click on the drop down arrow to display the search options:



The following table gives examples of how to use the search features.

NOTE: searching is NOT case sensitive.

Example	Result
black	Will return results where the text ‘black’ in any of the searchable fields. This will include “Blackwell”, “Blacktown”, or any word that includes the string “black”.
black day	Will return results where both words are in a searchable field – though not necessarily together. This will include “Black Day Publishing” and instances of “it was a day of black and gloomy clouds”
“black day”	Will return results where the two words are used together in a searchable field. This will include “Black Day Publishing”.
black OR day	Will return results where either of these words exist in a searchable field. This will include “Blackwell Scientific Publishing”, “Black day Publishing”, “it was a day of black and gloomy clouds” and “it was a dull day”.

black NOT day	Will return results containing the word “black” unless it also contains the word “day”. This will include “Blackwell Scientific Publishing“ but not “Black Day publishing”.
(black AND limited) or blessington	Will return results the words “black” and limited are used together – or the word “blessington” is used in a searchable field.

Fields searched on:

PhoneBook	Matters / Archived Matters
Name	File ID
Search	Short Description
Given Name	Long Description
Middle Name	
Family Name	**Clients**
Long Name	Search Name
Short Name	
Email	**DataForms**
Email2	Text Value
Email3	
Address/PostalAddress/DX/RegisteredAddress	**Safe Custody**
Suburb/PostalSuburb/DXLoc/RegisteredSuburb	Item Description
State/PostalState/DXState/RegisteredState	
PostCode/PostalPostCode/RegisteredPostCode	**Programs**
	Program name
Documents	Program description
Name	
Description	
Contents of documents (if Full Text Search is enabled)	

3.11 CrystalViewer.exe installation

(1) Previously, CRViewerSetup.exe and Usersetup.exe incorrectly installed the Crystal Report run time libraries in the wrong location in some 64 bit systems. This has been corrected.

4. Employees

(1) The Security Options have been re-arranged due to the changes made to PhoneBook, Client & Matter screens. The version up program will not change any of the Security settings.

5. PhoneBook, Clients and Matters

5.1 PhoneBook

5.1.1 Additional Email Addresses

(1) Lexis Affinity now allows three separate email addresses.

The existing email address will be stored as Email1 and the Default checkbox will be checked. At least one Email address must be flagged as a Default.

The new fields are available in the WordLink Field Builder as “EMAIL2” and “EMAIL3”. (The existing Email address (ie Email1) is EMAIL.)

The additional Email addresses are included in the PhoneBook report and the PhoneBook Details report.

Default email addresses are used whenever an Email action is executed within Affinity.

Report Super Schemas

The fields EMAIL2, EMAIL3 and DEFAULTEMAIL have been added to all Super Schemas that include general PhoneBook fields and Report Schemas and reports that currently include the existing single email address.

The Exchange integration service has been modified to synchronise the new EMAIL2 and EMAIL3 fields with the “Email 2” and “Email 3” fields respectively within the Exchange database.

5.1.2 Transfer Debtor Contact

(1) When transferring a Debtor Contact, the list of bills to be transferred will no longer include child bills of a master bill. Only master bills will be displayed.

5.1.3 PhoneBook Merge File Handles Quotes in Text

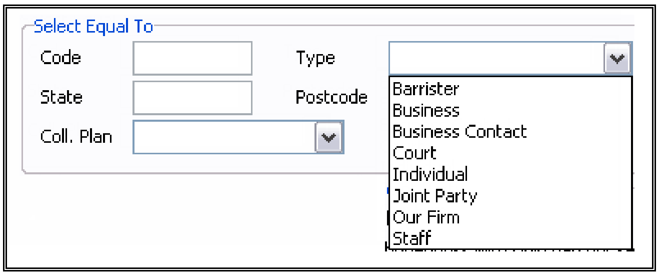
(2) A modification has been made to the Create Merge File function of the PhoneBook to handle PhoneBook records were data contains quotes (") in the text.

5.1.4 PhoneBook Merge File uses Quotes around Header Fields

(2) A modification has been made to the Create Merge File function of the PhoneBook in relation to the header record. If the user selects the option to output a header row together with the option to enclose text in quotes, the header row will now have quotes around the field names. In previous versions, the fields in the header row were not enclosed in quotes.

5.1.5 PhoneBook Filter

(3) The PhoneBook Filter has been amended to show the "*Types*" in full. Previously, only the Code was displayed in the drop down list.



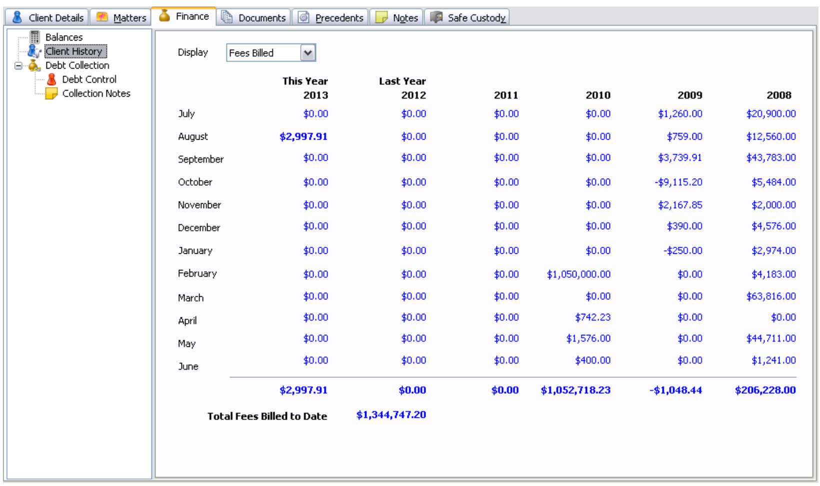
5.2 Clients

5.2.1 "Client History" tab

(1) Additional information is now displayed for each client. The "Client History" tab now displays Fees Billed or Received for the current and previous 5 years.

For more information regarding the display of information where multiple currencies are used, refer to Page 63 in this document.

A sample is shown below:



	This Year 2013	Last Year 2012	2011	2010	2009	2008
July	$0.00	$0.00	$0.00	$0.00	$1,260.00	$20,900.00
August	$2,997.91	$0.00	$0.00	$0.00	$759.00	$12,560.00
September	$0.00	$0.00	$0.00	$0.00	$3,739.91	$43,783.00
October	$0.00	$0.00	$0.00	$0.00	-$9,115.20	$5,484.00
November	$0.00	$0.00	$0.00	$0.00	$2,167.85	$2,000.00
December	$0.00	$0.00	$0.00	$0.00	$390.00	$4,576.00
January	$0.00	$0.00	$0.00	$0.00	-$250.00	$2,974.00
February	$0.00	$0.00	$0.00	$1,050,000.00	$0.00	$4,183.00
March	$0.00	$0.00	$0.00	$0.00	$0.00	$63,816.00
April	$0.00	$0.00	$0.00	$742.23	$0.00	$0.00
May	$0.00	$0.00	$0.00	$1,576.00	$0.00	$44,711.00
June	$0.00	$0.00	$0.00	$400.00	$0.00	$1,241.00
	$2,997.91	$0.00	$0.00	$1,052,718.23	-$1,048.44	$206,228.00
Total Fees Billed to Date	$1,344,747.20					

If the dataset has multiple entities and a client has matters in different entities then the entity selected also determines the financial year.

5.3 Matters

5.3.1 Matter Types

(1) It is now possible to set up to three date fields for each Matter Type. Each date field can be named to suit the users' requirements and can be set to be a compulsory field if necessary.

On the Matter Types screen, select the "Key Dates" tab.

Name the date field and select from:

[Normal]	can be completed or left blank
Non Blank	must be completed
Not Used	the field will not be visible on the matter screen

When creating or editing matters, the date fields are on the "Analysis" tab.

They will be displayed on the matter under Matter Details | Overview

Matter Table
The date fields are named KEYDATE1, KEYDATE2 and KEYDATE3.

Matter Type Table
Two additional fields for each date have been added – for example;
Date 1: KEYDATE1CAPTION, and KEYDATE1FLAG.

The date fields have been added to:

- All Matters Search Filter
- Matter Filter
- Matter details report
- Matter Labels (Standard labels as supplied by LexisNexis)
- Wordlink
  Matter table – KEYDATE1, KEYDATE2, KEYDATE3
  Matter Type table – KEYDATE1FLAG, KEYDATE1CAPTION etc
- Tasks – dates are available as a "Due Date"
- Report Schemas that are matter based

5.3.2 Matter "Contacts" tab

(1) When the user double clicks on an entry on the Matter "Contacts" tab, the PhoneBook record for the contact now displays. Previously this action opened the Matter Contact (Matter Party / Other Party) dialog.

5.3.3 “File Notes” tab introduced

(1) A new “File Notes” tab has been introduced for matters. Users can add, edit, print and delete File Notes via this tab. File notes that are entered with a Fee entry can be included and these are displayed in green.

A new Security Option has also been introduced to control access to these notes. (Matters | Tabs | Notes).

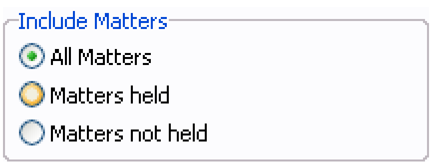
Version Up.
The “Notes” tab, “Create” option are enabled.
The “Delete” option is disabled.
The “Edit” option is enabled.
The “Edit Note By Others” option is disabled.

For full details on creating and using File Notes, please refer to the “Clients” chapter in the Lexis Affinity Library Essentials document via Help.

For full details on all Security Options please refer to the “Security Options” chapter in the Lexis Affinity Library Administrator document via Help.

5.3.4 Matter Filter

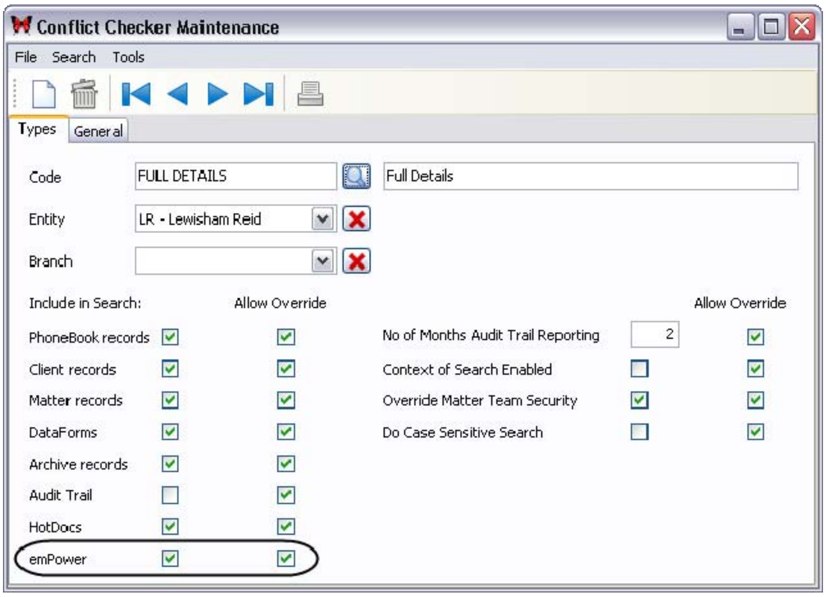
(3) The wording for the “Include Matters” options in relation to the “held” status of a matter has been modified to make the meaning clearer.



5.4 Conflict Checker – include emPower data

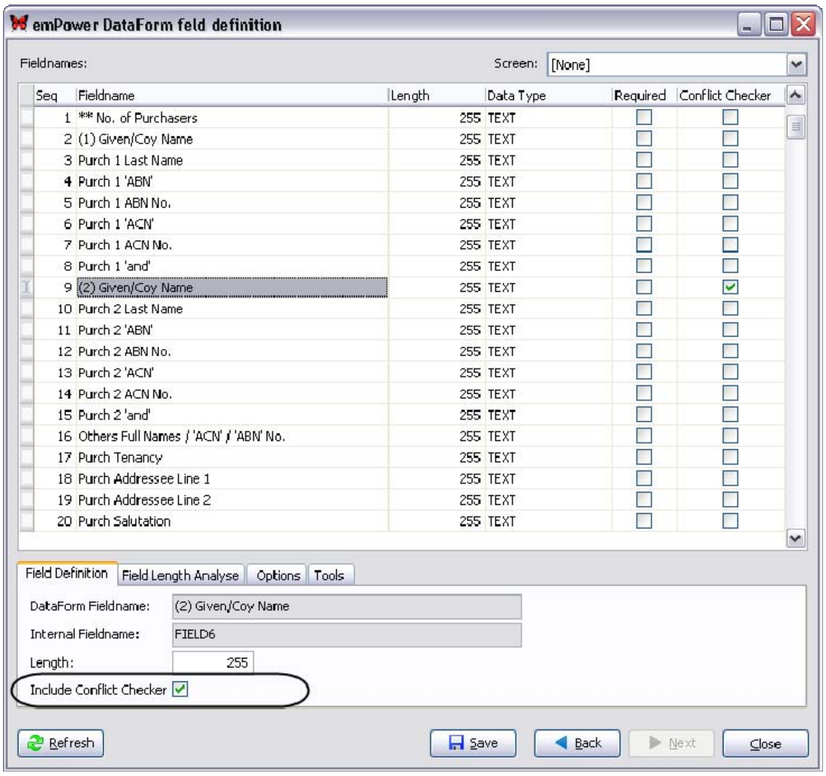
(1) A new option has been added to Conflict Checker to allow for searching data stored in emPower fields.

Note that this is only available for conflict checks where the output is an internal report, not for Word templates.



When the emPower option is selected for inclusion in a conflict check, emPower fields will only be checked if they have been nominated to be included in the conflict checking.

To nominate a field for inclusion in conflict checking, open the emPower DataForm Field Definition window. This can be accessed by selecting System Variables | emPower System |Tools | Database Field Definition. After selecting the emPower module, the following window will display where individual fields can be selected for inclusion in conflict checking.


emPower DataForm feld definition
Fieldnames:
Screen: [None]
Seq Fieldname Length Data Type Required Conflict Checker
1 ** No. of Purchasers 255 TEXT
2 (1) Given/Coy Name 255 TEXT
3 Purch 1 Last Name 255 TEXT
4 Purch 1 'ABN' 255 TEXT
5 Purch 1 ABN No. 255 TEXT
6 Purch 1 'ACN' 255 TEXT
7 Purch 1 ACN No. 255 TEXT
8 Purch 1 'and' 255 TEXT
9 (2) Given/Coy Name 255 TEXT
10 Purch 2 Last Name 255 TEXT
11 Purch 2 'ABN' 255 TEXT
12 Purch 2 ABN No. 255 TEXT
13 Purch 2 'ACN' 255 TEXT
14 Purch 2 ACN No. 255 TEXT
15 Purch 2 'and' 255 TEXT
16 Others Full Names / 'ACN' / 'ABN' No. 255 TEXT
17 Purch Tenancy 255 TEXT
18 Purch Addressee Line 1 255 TEXT
19 Purch Addressee Line 2 255 TEXT
20 Purch Salutation 255 TEXT
Field Definition
Field Length Analyse
Options
Tools
DataForm Fieldname: (2) Given/Coy Name
Internal Fieldname: FIELD6
Length: 255
Include Conflict Checker
Refresh
Save
Back
Next
Close

6. Safe Custody

6.1 Report printed from Safe Custody

(1) The report printed from the Safe Custody application now includes all Clients & Packets if they are included on the Safe Custody Selection Screen.

The external report – ie printed from Reports has also been amended, as under some circumstances, the heading could be incorrect.

7. Fees

7.1 Fee Sheet

(1) Several major modifications have been made to the Fee Sheet. The Fee Sheet now has similar functionality to the Fee List and it is now possible to modify submitted entries from the Fee Sheet. The system uses a FEESHEET table and a FEE table (this is used for the Fee List). From this Version submitted fee entries are automatically moved from the FEESHEET table to the FEE table.

The changes include:

- A Billable Hours Summary showing the number of hours or units and value of billable time and the number of hours or units of non-billable time.
  (Options are available to customise how this information is displayed.)
  This information is available on a Daily, Weekly. Monthly and Yearly basis

  The Budget values are calculated based on the option that you set in System | Fee Sheet. Additional information is in the "Fees" chapter of the Operations Workbook.

- The prompt options when closing the Fee Sheet have been modified in System | Fee Sheet.

- The summaries displayed in the Status bars at the bottom of the Fee Sheet will now show the currently filtered data.

- A new "Export to File" option

- An icon to easily select entries made by the logged in user or by another user

- Colour coding is now implemented:

State	**Colour**
Non-submitted	Black
Submitted	Grey
Billed	Purple
Reversed	Red
Credit Notes	Green

- In drop down lists such as Type, users can now press the Up and Down arrow keys to navigate between the items in dropdown lists.
  This applies to the Type, Type Code, Branch, Department, Private, Employee Type, Tax Type and Item Tax Type columns.

Also users can type a sequence of characters and this will be used to locate the item in the drop down lists – for example typing “DRA” will find Draft (if its in the list).

- The Security options for Fee (Delete, DescrOnly, Edit and OverrideTaxcode) are also now applied to **submitted** items in the Fee Sheet.

- The print options from Fee Sheet shave been amended and you can now select to print All or Selected entries or entries within a date range. (Check v3.5)

- The option to delete entries after nn days has been removed, as it is no longer required
  Previously this option removed those entries from the FEESHEET table as they were added to the FEE table when they were submitted.

- The Fee Sheet now shows entries from the FEE table, so if an entry has been edited after it was submitted (from the Fee List) the updated details will now be shown in the Fee Sheet.

- A “History” tab has been added to the Fee Creation screen. When entries are altered a credit entry for the original values will be displayed and a new entry for the adjusted values.

- It is now possible to select another Author whilst on the Fee Sheet, previously this was on the “Options” tab

- A Date Selector has been added to allow you to easily change the date range.

- The settings previously on the “Defaults” tab are now on the “Options” tab and some settings have been reorganised

- An additional tab for “Statistics” is now available.

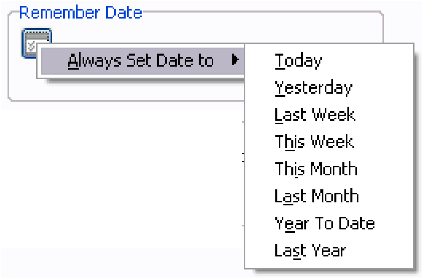
- The “Filter” tab now contains options similar to the Fee Sheet

- A Time Sheet icon will be displayed in the System Tray. From here you can Launch the Fee Sheet or the “options” tab on the Fee Sheet, start a new entry or stop the timer. This is primarily to assist users in quickly accessing the Fee Sheet when they are using applications outside Affinity.

- A setting has been added to the “Options” tab, so that the system can monitor inactivity when a fee sheet entry is being timed. When the user stops the timer against a fee sheet entry which has inactive time registered against it using the Stop Timer Icon in the toolbar, a message will display:
  "Affinity has identified a period of xxx minutes of inactivity on the computer whilst the timer was running. Do you wish to subtract this time from the value of this time entry?"

- A new setting on the “Options” tab allows the user to set the Fee Sheet so that the filter setting is retained when the Fee Sheet or Affinity is closed.

- The “Filter” tab has a new option, to allow users to remember a selected date range (for example “Today”. “This week” etc)



7.2 Fee Sheet icon in Taskbar

(1) The Fee Sheet icon will no longer display in the taskbar if the logged in user does not have Launch Clearance for Fee Sheet.

7.3 Fee Template entries when inserted in Fee Sheet

(1) If a Fee template had *‘Record Separate Scale Cost to Fees’* ticked, and was used in a Fee Sheet, the unit description was shown as Units on both the Fee List and WIP Ledger, instead of the actual description. All values were reported correctly.

7.4 Fee Batch Entry

(3) Snapshot for Fee Batch Entry now selects the correct program.

8. Bills

8.1 Sending Bills by Email

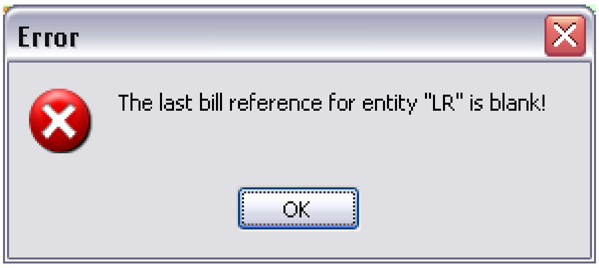
(1) Lexis Affinity v4.0 now supports the sending of Bills by email.

This feature requires some setup and review of PhoneBook and/or the Client records.

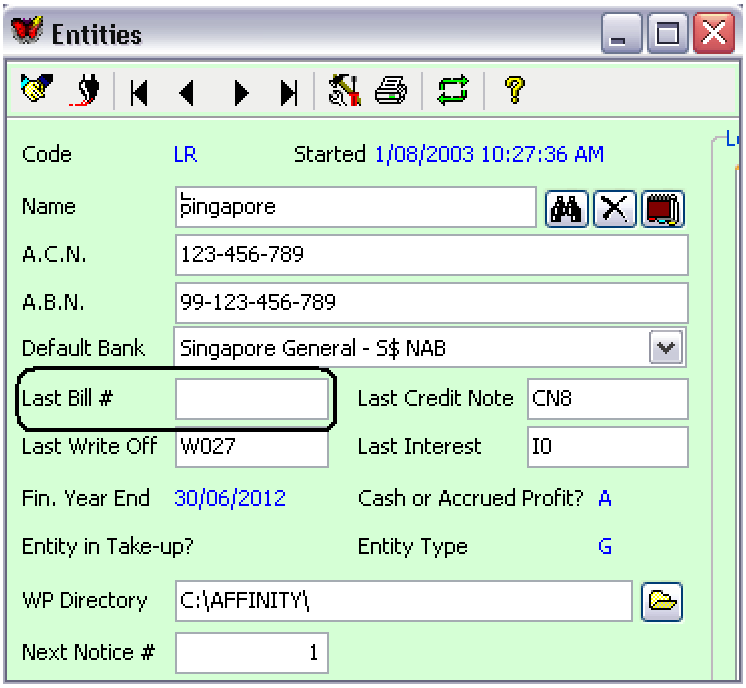
Information about the setup and processing of bills to be sent by email can be found on Page 65 of this document.

8.2 Blank Last Bill

(1) If the Last Bill reference is blank on the Entity table, and the user attempts to process a bill, a warning message will be displayed:



In this case, you will need to amend the Entity.



8.3 Adjustments to Debtors

(1) In a matter where there are debit debtor transactions and a receipt has been posted but not allocated, the receipt may not appear as available to allocate. The process has been modified so that the entries are read from the latest transaction first and all entries should now be displayed.

9. Collections

9.1 Sending Debtors Letters by email

(1) Lexis Affinity v4.0 now supports the sending of Debtor Letters (including Account Rendered Statements) by email.

This feature requires the user to amend the PhoneBook and/or the Client records and the various Collection Plans.

Part of this change also allows the user to put the Collection Cycle on hold.
This can be a permanent change (done via the PhoneBook, Client or Matter record) or a temporary change (done during the collection cycle).

Full details of the setup and processing of letters to be sent by email can be found on Page 65 of this document.

9.2 Account Rendered Statements

(1) The Account Rendered Statements have been modified in respect to interest charges. Previously interest was included twice.

10. Transactions

10.1 Cheques

10.1.1 Present Current Cheque

(1) Version 3.5 introduced the function of pressing F9 to quickly access Affinity programs. This conflicted with pressing F9 to present a cheque when it was displayed in the Cheques listing.
Present Current Cheque can now be activated by pressing Shift + F9.

10.1.2 Cheque Requests – converting

(1) A System Check error could result when converting an Anticipated Disbursement and changing the Tax code from/to NOTAX to EXCL or AGENT.

10.2 Receipts

10.2.1 Special Clearance

(1) Version 3.5 introduced the function of pressing F9 to quickly access Affinity programs. This conflicted with pressing F9 for a Special Clearance on a receipt when it was displayed on the receipts listing.
A Special Clearance can now be actioned by pressing Shift + F9.

10.3 Journals

10.3.1 Transfer between Protected and Unprotected Trust

(1) The transfer between Protected and Unprotected trust funds now processes the debit entry first, so that the trust balance is not over stated at any point.

10.3.2 AutoGen Entries

(1) The AutoGen program has been modified to make it more flexible and to allow for multi line cheques.

The Version up program will assign a code to each existing entry based on the Payee or Journal description.

For full details on creating and processing AutoGen entries, please refer to the “AutoGen” chapter on Page 79.

10.4 Sundries

10.4.1 Sundry Batch Entry

(1) A “Description” column has been added to the Sundry Batch Entry grid.
The contents of this column will be what is defined in User Options | Matter Display.

10.4.2 Sundry Import

(1) If a Sundry Interface file was imported and one of the entries had a blank sundry type an error resulted. This has been corrected, so that these entries will now display in the Sundry Import Errors listing.

10.5 Investments

10.5.1 Investment Journals

(1) The Deposit Date in Investment Receipts is now controlled by the Investment Journal Audit date. Previously, the Entity Override date was used.

10.5.2 Investment Trial Balance

(1) The Account Name has now been added to the Investment Trial Balance.

10.5.3 Investment Commission journals now reverse correctly

(1) Previously, Investment commission journals posted using the "New commission" selection, were not reversing all entries. This has been corrected.

10.6 Creditors

10.6.1 Paying Creditors for more than one Entity

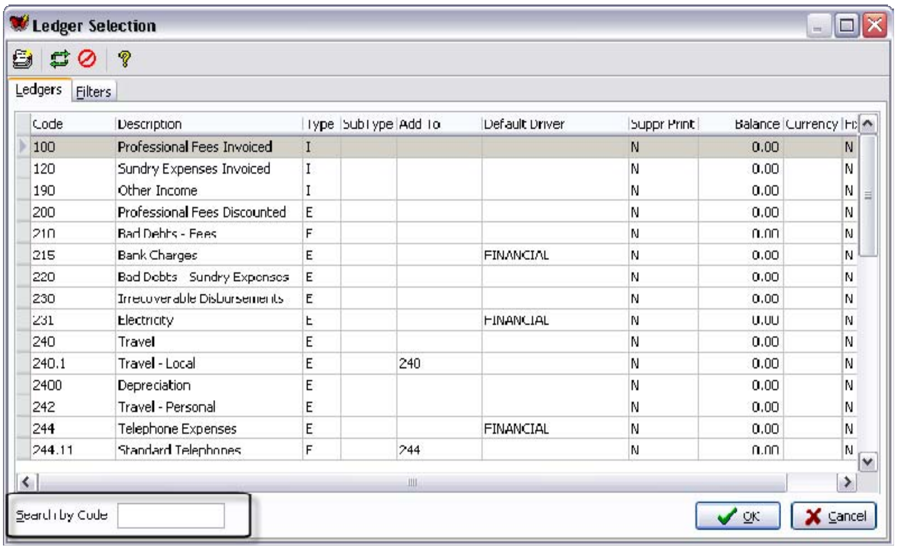
(3) Previously, if the user paid Invoices for more than one Entity, the pop up screen to confirm the bank account did not display in some circumstances. This has been corrected.

11. General Ledger

11.1 Search for General Ledger Charts

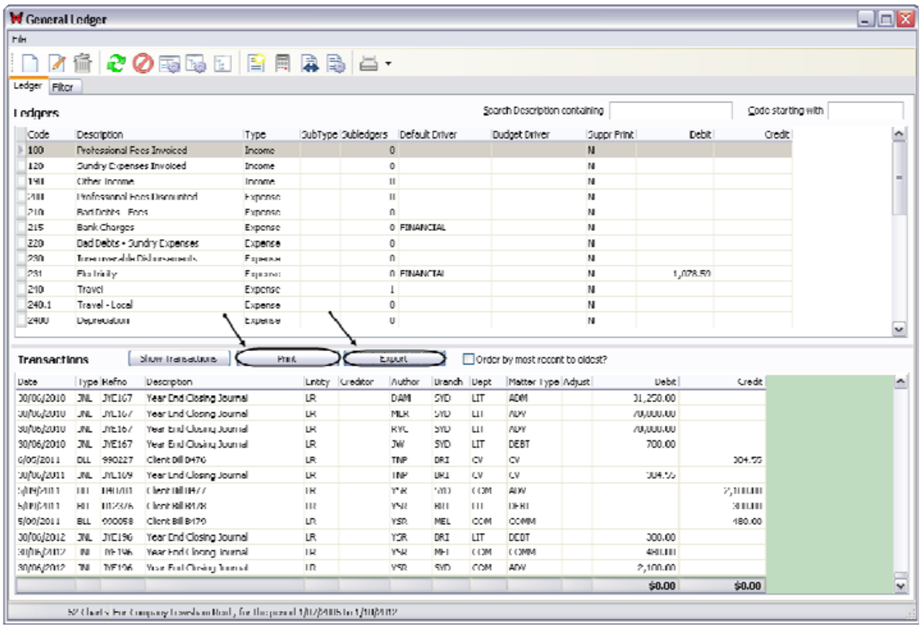
(1) When accessing the General Ledger Selection screen from another program, the screen now includes a “Search Description containing” search box.
This allows the user to search for and locate a GL Chart without using the “Filter” tab.

The General Ledger screen is shown below:



11.2 “Print” and “export” options added

(3) Two new options have been added to the General Ledger program. These options allow you to print the transactions that are displayed in the Transaction grid and to export the data to a csv file.



Print
A report will be generated showing the Date, Type, Reference, Description and value of each transaction displayed.

Export
A csv file will be created including all the data that is displayed in the Transaction grid. The user must nominate the save location of the csv file before it is created and will be prompted to open the file.

12. Reports

(1) Some modifications have been made to the following reports to reduce the length of time taken to generate the results:

- Billing by Client
- Fee Earner Productivity
- Financial Management Report (Data Export)
- Profitability Analysis
- Timekeeper Overview
- Author Financial Overview
- Creditors Trial Balance
- Expected Cash Flow
- Itemised Debtors (Data export)

12.1 Year End process and prompted date ranges on reports

(1) Previously, after running the Year end process the 'Print from dates' were not reflecting the correct financial year.

12.2 Aged Balances Report

(1) The Aged Balances report (Classic report) has been amended so that when the report is printed by group, back dated and includes matters where bills have receipted, unallocated, reversed and reposted, the grouping is now processed based on the actual matter transactions.

12.3 Bills Dispatched report

(1) The .exe file for the Bills Dispatched report has been renamed to BillsRendered.exe as under some operating systems the partial word match for "patch" was causing UAC pop up warnings.

13. Lexis Affinity Precedents

13.1 Email Precedents

(1) Email Precedents have been introduced in this version of Lexis Affinity for use with MS Office 2007 and 2010.

An email precedent, when generated, will be output directly to an email message rather than a Word document. However, processing of the precedent mergefields and other directives is performed in Word then passed to the email message.

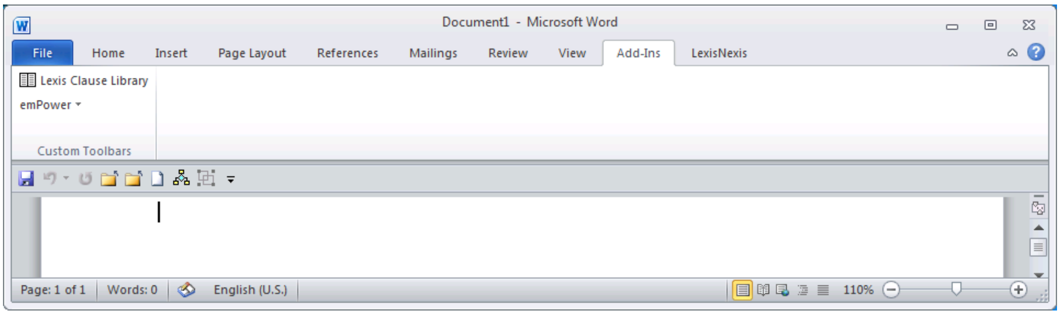
Wordlink fields and Affinity scripting can be used for processing these precedents.

13.2 Lexis Clause Library

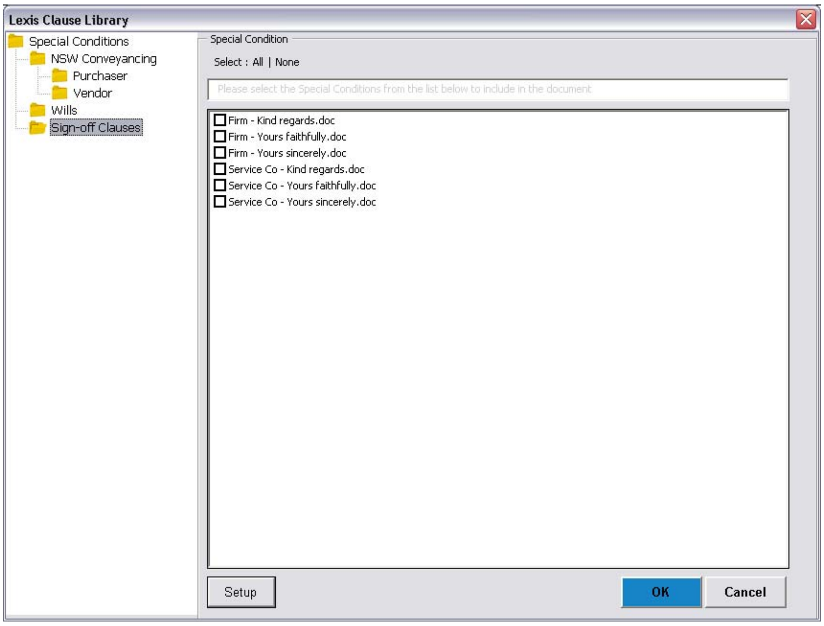
(1) The Lexis Clause Library is a new plug-in available for use in MS Word. (Note that your firm may already be using this plug-in if you also use emPower Precedents.)

This feature allows you to set up a library of your own frequently used clauses, special conditions, standard paragraphs and the like which can be inserted into Word documents after the document has been generated.

When installed, a Lexis Clause Library button will display under the Add-Ins tab in MS Word 2007 and 2010, or directly on the toolbar for Word 2003.



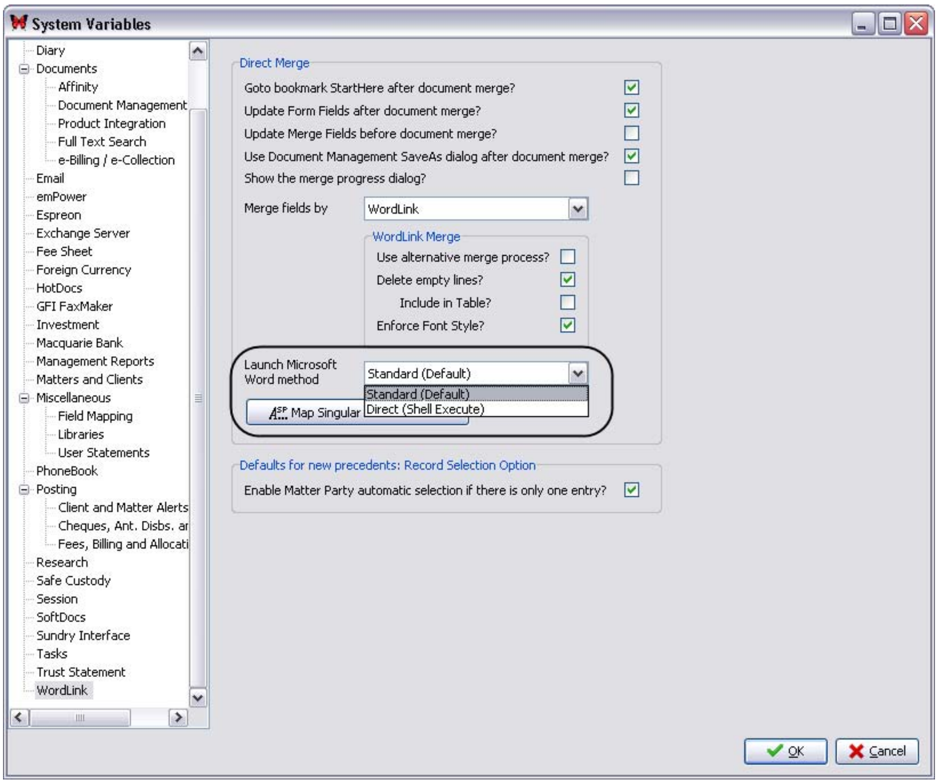
The files required for the Lexis Clause Library can be found in your Affinity network folder, under Utilities \ Lexis Clause Library. Instructions for installation can be found in the file README.TXT available in that folder.



13.3 Alternative Method to Launch Microsoft Word

(2) In some environments, the standard method for launching Microsoft Word when merging precedents may fail intermittently. If this occurs, an alternative method for launching Word is available.

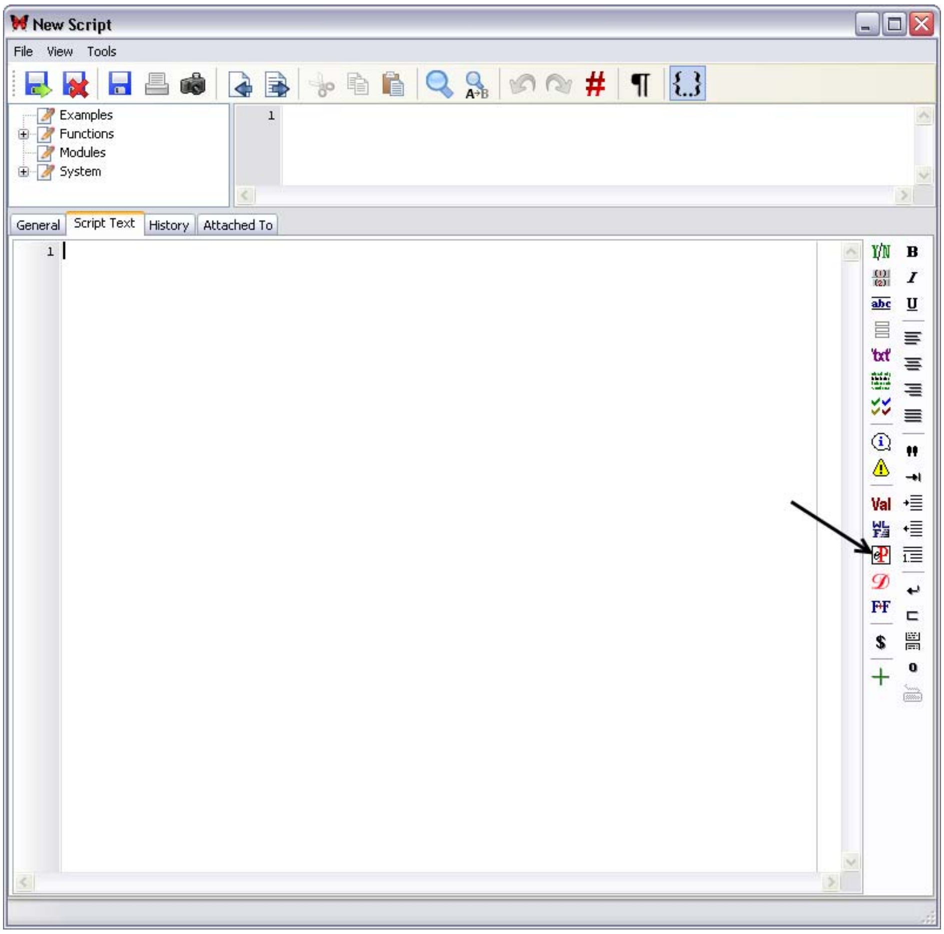
This setting is found under System Variables | WordLink. The new field is labelled "Launch Microsoft Word method". The Standard method is the default. The alternative method is Direct (Shell Execute).



14. Scripting

14.1 emPower Field Builder for Scripts

A new emPower Field Builder feature is available in the Scripts window to facilitate use of emPower fields in scripts. The feature is accessed by clicking on the new emPower icon on the toolbar in the Scripts window.



For full details on using emPower fields in Lexis Affinity scripts, please refer to the "Advanced Scripting" document in Help | User References.

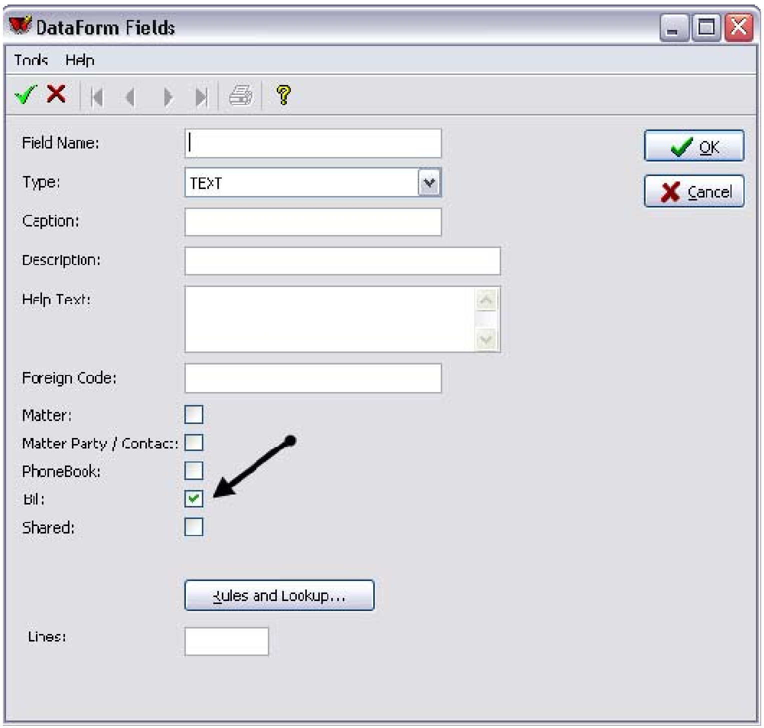
14.2 Updating Client Records using apInitClientForm()

(1) Using the apInitClientForm() scripting command was not running correctly when trying to update or edit a client record. This has been resolved.

15. DataForms

15.1 Create a new Bill DataForm

When adding DataForm fields to a Bill DataForm, the “Bill” option will now be ticked by default.



16. Product Integration

16.1 Exchange Integration

16.1.1 New Version of AffService Executable Files

(1) There is a new version of the AffService executable files for this release. The executable files are:

AffService32_2007.exe
AffService32_2010.exe
AffService64_2007.exe
AffService64_2010.exe
ContactImportUtil.exe

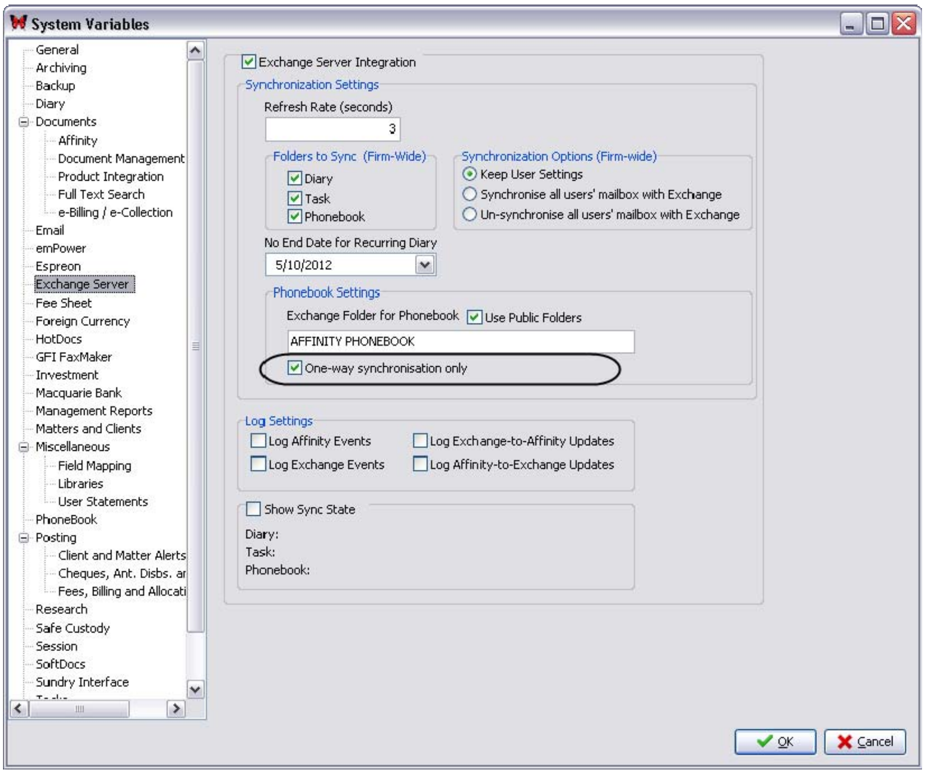
The version number (found under Properties) for these executables is **4.0.0.1**.

16.1.2 PhoneBook - Contacts Integration

(1) An option has been added to the PhoneBook - Contacts integration to turn off two-way synchronisation. This means that the synchronisation will be one-way only, from Lexis Affinity to Outlook. Any modifications made to a contact in Outlook will not be updated in the corresponding Affinity PhoneBook record. To activate this feature:

1. Select System Variables | Exchange Server.

2. Select the checkbox beside "One-way synchronisation only". Click [OK] to save and close.



16.1.3 Display of Appointments in Outlook

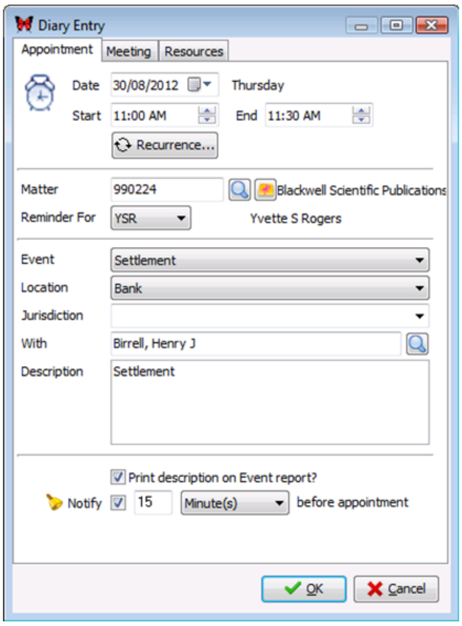
(1) The way Affinity Diary appointments display in the Outlook Calendar has been modified. In Calendar, the appointment will now display using the following pattern:

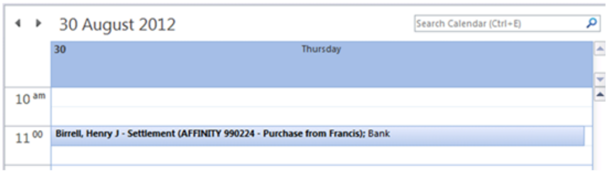
PhoneBook Name + Description (Affinity: Matter ID – Matter Description)

The PhoneBook name is taken from the "With" field on the Affinity Diary form.

This will allow more meaningful information to display in the Calendar when in weekly and monthly view.

For example, the following Diary appointment (on the left) will display in Outlook Calendar as shown on the right:





16.2 Support for Worldox GX2 and GX3

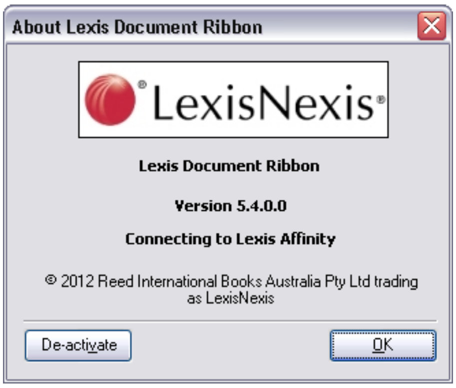
(1) Lexis Affinity 4.0 now supports integration with Worldox GX2 and GX3. For further information, refer to the document "Worldox Integration with Lexis Affinity 4.0". This can be requested from the LNHelpline.

17. Document and Email Features

For more detailed information on enhancements to Document & Email Features, please refer to the "Document Management" chapter in the Lexis Affinity Library Essentials document and the Document Management Administration document, both available via Help.

17.1 New Version of Lexis Document Ribbon and Toolbar

(1) A new version of the Lexis Document Ribbon and Toolbar is included in this release. The version number is for the Ribbon/Toolbar is **5.4.0.** The new features are listed below.



17.2 Ribbon Installed if MS Word 2007 or 2010 Present

(1) In previous versions of Lexis Affinity, the User Setup program would install the Lexis Document Toolbar (com add-in version) rather than the Ribbon if MS Word 2003 was detected in the Windows registry, even if Word 2007 and/or Word 2010 was also detected. This has been modified so that if Word 2007 and/or Word 2010 is detected in addition to Word 2003, the Ribbon will always be installed. This is because, in most cases, Word 2003 had in fact been uninstalled or was otherwise not being used. The com add-in version of the toolbar can be easily installed separately if required.

17.3 Microsoft Office Native PDF Support

(1) Microsoft's native PDF add-in is now available for use with Lexis Affinity 4.0. (PDFCreator will continue to be supported for this version of Lexis Affinity.)

This add-in is only available for MS Office 2007 and MS Office 2010 (not MS Office 2003).

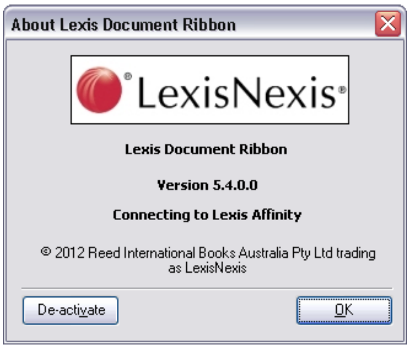
17.3.1 Using MS Native PDF with Lexis Document Ribbon

The MS native PDF add-in can be used with the Lexis Document Ribbon 5.4.0.0. It is not available for the Lexis Document Toolbar (com add-in version used primarily with Word 2003).

To enable the add-in for use with the Lexis Document Ribbon:

1. Open Word and select the LexisNexis tab.

2. Click the icon to open the following dialog box:



3. Click [Ctrl+Alt+Shift] and simultaneously right-click the LexisNexis logo to open the Password dialog box.

4. Enter the password *letmein* in the password field and click [OK].

5. Select the [Document Save Options] button.

6. Select the Enable Native MS Office PDF Support checkbox.

   When this option is enabled, Microsoft's native PDF add-in will be used to create PDF documents, instead of PDFCreator.

7. If you are using Word 2007, the following warning message will display:

If you require the add-in to be installed, you can download it from Microsoft's website.

If the add-in is not installed, an error message will display when you click [Save As PDF] on the Lexis Document Toolbar (for MS Word 2007 only).

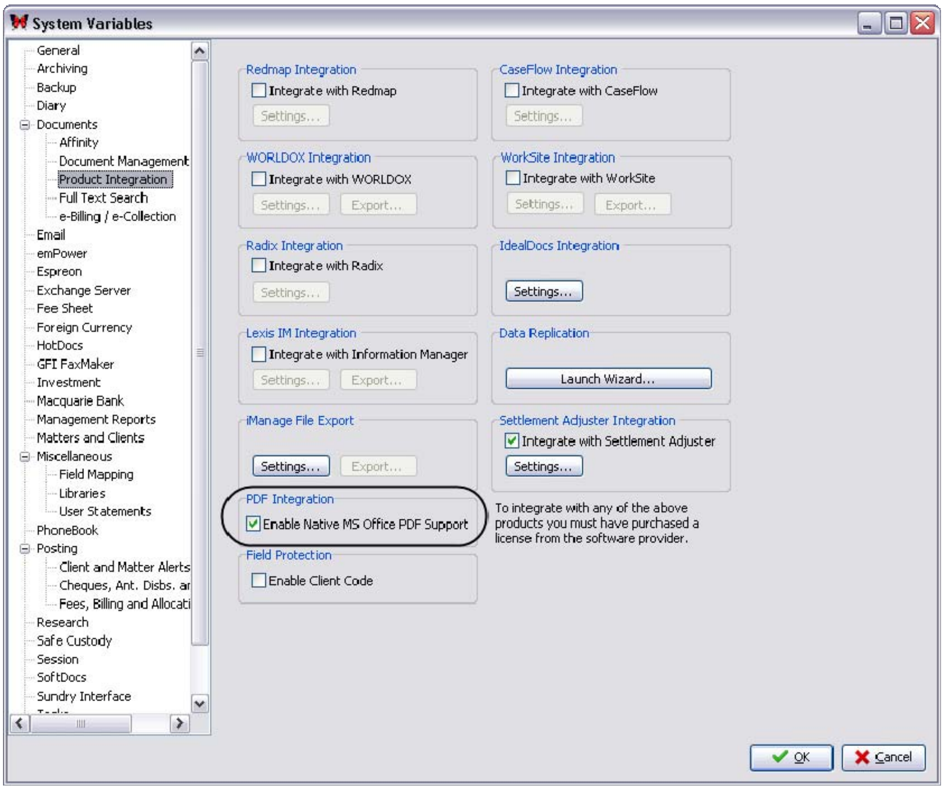
17.3.2 Creating and Emailing PDF Files from Lexis Affinity

(1) If you are using the Microsoft Native "Save as PDF" add-in (Office 2007 and Office 2010 only), you will now be able to convert documents and spreadsheets to PDF format prior to emailing.

The file types that can be PDF'd are: doc, docx, docm, rtf, txt, xml, csv, xls, xlsx and xlsm.

To activate this feature:

1. Open System Variables and select the Documents | Product Integration tab.



2. Select the checkbox for Enable Native MS Office PDF Support.

3. Select [OK] to save and close the System Variables window.

With this feature enabled, the Email as PDF function will be available from the Documents tab on PhoneBook, Clients and Matters, and the Document Management window.

17.4 Watermarks in DM Print Styles – Word 2010

(1) A problem was identified when using Watermarks in DM print styles in Word 2010. The error message "Error in frmDocPrint Pastewatermark" displayed when section breaks were used in the document, and the watermark was not removed from the document after printing. This has been rectified.

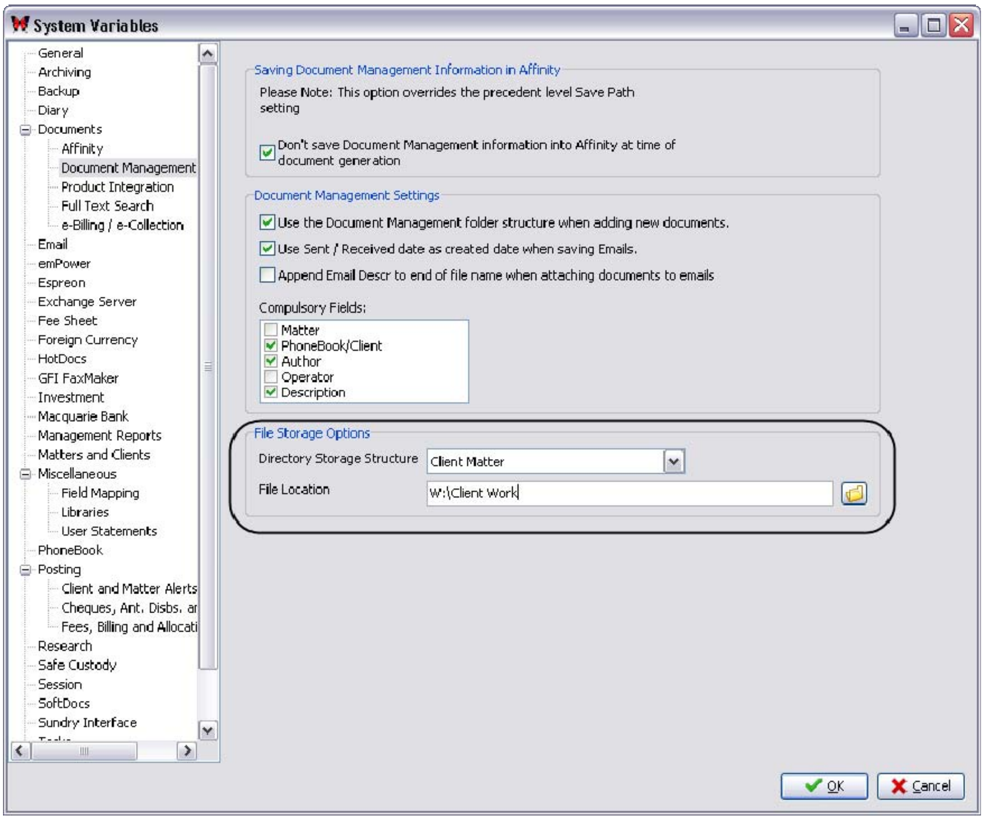
17.5 New Tab in System Settings – Document Management

(1) A new sub-tab labelled "Document Management" has been added to System Variables | Documents. This window contains settings in relation to Document Management. Some of these settings are pre-existing but have been moved from other windows, while some of the settings are new in this version. The new settings are described below.

17.6 Document Save Settings Stored in Affinity Database

(1) In order to facilitate saving documents from an external source via the Affinity API, some of the document save settings can now be stored in the Affinity database.

The new settings are found in Lexis Affinity under System Variables | Documents | Document Management.



It is not mandatory to complete these fields, but if details are entered they will take priority over settings in the Lexis Document Toolbar.

Directory Storage Structure determines the folders structure that will be used when files are saved using the Lexis Document Toolbar and Lexis Email Toolbar.

File Location is the base folder location for creation of the folders and files.

This information is stored in the Current User area of the Windows registry. When a user opens Lexis Affinity, the relevant registry keys will be updated with the information stored in these two fields.

17.7 Document Folders

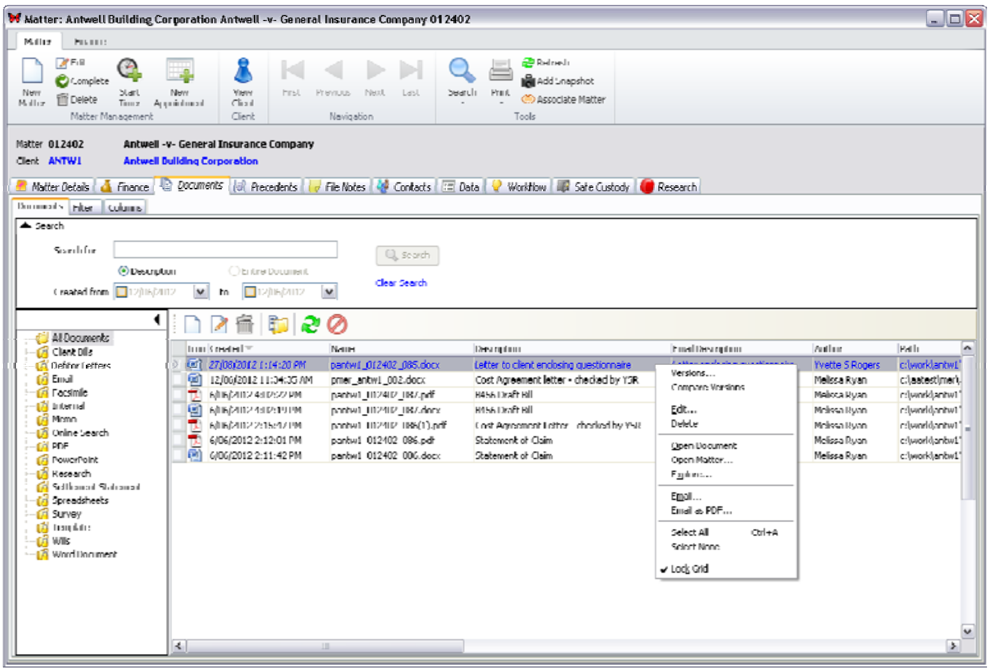
(1) Documents saved in Lexis Affinity may now be assigned to Document Folders. The Document Folders feature replaces Document Types. Folders can be seen in the Documents window in Lexis Affinity and are displayed in the pane on the left-hand side of the window.

Pre-existing Document Types in your Lexis Affinity database will now display as System Folders. These can be viewed in the Document Folders program. You may also customise your matter types to display only a sub-set of System Folders.

In addition to System Folders, Custom Folders can be created on specific matters and PhoneBook records.

17.8 "Documents" window display modified

(1) The Documents window in Lexis Affinity (available on PhoneBooks, Clients and Matters) and the Document Management \ DM Admin windows has been modified.



Key features are:

1. Document Folders display in the left-hand pane (collapsible).
2. Email Description field available in grid display.
3. Search panel above documents list for quick filtering of documents based on description and/or date and/or document contents (if full text search enabled).
4. Drop-down menu (right mouse click) has new menu items for Versions, Compare and Email as PDF.
5. If the window is re-sized, the size will be "remembered". This is a per user setting and survives an Affinity restart.

17.9 Versioning

(1) Document versioning is now available as part of the Lexis Affinity Document Management system. Versions of documents can be created via the Lexis Document Ribbon/Toolbar which now has a new [Save as Version] button.

Note that versions are stored as separate documents with unique document names, but are linked with the original version.

The version number can be shown in the document footer.

A document with versions will display in **blue** in the Lexis Affinity Documents grid. To view the versions, right-click on the document and select "Versions" from the drop-down menu. This will display the Versions dialog box where the user can select a version to open.

17.10 Compare Documents

(1) A document compare feature has been included in the Lexis Affinity Document Management system.

The Compare feature is available on the drop-down menu (right mouse click) when one or two documents are selected in the Documents grid.

Compare is only available when Word documents are selected. If another file type is selected, the Compare menu item will inactive.

Results of the comparison will display in Word either in a new document or in one of the documents being compared (depending on the setting selected by the user).

17.11 New Lexis Email Toolbar

(1) A new version of the Lexis Email Toolbar is included in this release. The version number is is **5.4.0.**

17.12 Use Sent/Received date as created date for emails

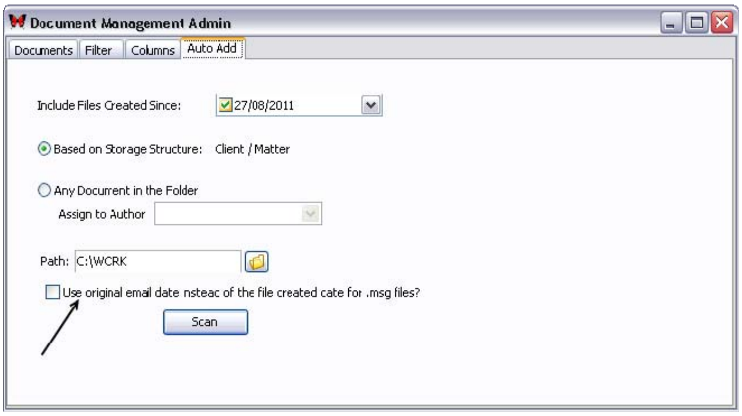
(1) A new option is available to use the sent date (for sent emails) and the received date (for received emails) as the created date in the Document Management table.

To activate this option, go the System Variables | Documents | Document Management and select the checkbox beside "Use Sent / Received date as created date when saving emails".

If this option is not selected, the created date for email items will continue to be the date the email message was saved to the database.

17.13 Adding Emails via AutoAdd

(1) When emails are added to the Lexis Affinity database in bulk via the AutoAdd feature, there is an option to assign the sent/received date as the created date when the record is added to the database. This option is found on the AutoAdd dialog box in the Document Management Admin window.



17.14 Descriptive Names for Email Attachments

(1) When files are attached to email messages generated from Lexis Affinity, the descriptive name of the file can be used for the attachments.

Prior to a file being attached to an email, the file will be renamed using the contents of the new field "Email Description".

When Word documents are saved using the Lexis Document Toolbar/Ribbon, the Email Description field will be automatically populated with the contents of the Description field. The Email Description field may be modified, which will not affect the Description field.

The contents of the Email Description field may also be deleted. If the Email Description field is blank, Lexis Affinity will use the original name of the file when attaching the file to an email.

The Email Descr field can be added to the Documents grid in Lexis Affinity so that it can be seen by users prior to emailing documents.

Users may rename attachments "on the go" by choosin g to display the Attachments dialog box when sending emails.

To display the Attachments dialog box:

1. Select Utilities | User Options | Email.

2. Select the checkbox beside Prompt for file name when attaching documents".

3. Select [OK] to save and close.

17.14.1 Append Email Description to file name

From Affinity 4.0 onwards, the Email Description field will be used as the file name when a document is attached to an email. In addition to this, you can also choose to use the actual file name with the Email Description field appended to it.

To activate the append option, go to System Variables | Documents | Document Management and select the checkbox beside "Append Email Descr to end of file name when attaching documents to emails".

17.15 Static Registry Values for Lexis Email Toolbar Settings

(1) From this build, the Windows registry keys for the Lexis Email Toolbar settings will not be stored under the email profile name. Previously the registry values were stored under:

<HKCU>\Software\VB and VBA Program Settings\Locus\DMEmail\<mail profile name>

From Affinity 4.0.1 onwards, the mail profile name will be dropped. The registry values will now be stored under:

<HKCU>\Software\VB and VBA Program Settings\Locus\DMEmail\

The purpose of this change is to allow the registry settings to be deployed automatically for all users. Inclusion of the profile name in previous versions was preventing this.

17.16 Filter for [Select Documents] in Outlook

(1) In previous versions of the Lexis Email Toolbar, the default filter applied to the Document Selection dialog box was the last month of files. The filter settings have been modified so that if valid matter or PhoneBook metadata is present in the subject line, the Document Selection dialog box will be filtered by that matter or PhoneBook record.

If metadata for more than one matter or Phonebook is present in the subject line, the first valid pattern found will be used.

If no metadata is found in the subject line, the default filter ("last month") will be applied.

17.17 Streamline Saving Emails and Attachments

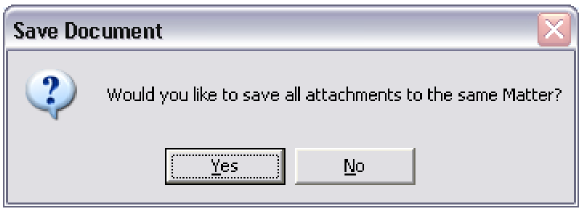
(1) A number of changes have been made to streamline the process of saving emails and their attachments (where the attachments are being saved separately in native format). This is in relation to manually saving emails using the [Save As] button on the Lexis Email Toolbar rather than the autoprofiling method.

Order of Save

When an email with attachments is saved (attachments in native format), the order of the items to be saved has been modified. The email message will always be saved first, and then the attachments will be saved in the order in which they display in the email message.

Prompt to Save to Same Matter/PhoneBook

After the email message has been saved, the following prompt will display:



Select [Yes] to save all the attachments to the same matter and/or PhoneBook entered for the email message. The save process will occur in the background and no further user interaction is required.

Select [No] to display the Save Email dialog for each attachment.

Matter and/or PhoneBook Details Retained

If the selection is [No] on the dialog box shown above, the Save Email dialog box will display for each attachment, but will retain the matter and/or PhoneBook details entered for the first item that was saved. This can be changed for each attachment if required.

17.18 Handling of Duplicate Emails

(1) Where email autoprofiling is turned on for multiple users, the result can be that duplicate emails are saved to the Lexis Affinity database. The most common scenario causing this is where one user has emailed a client, but has also CC'd other users in the firm.

A modification has been made so that duplicate emails are detected. If an email is determined to be a duplicate (ie. has already been saved to the Lexis Affinity database) it will not be saved again. However, the "Saved" column in Outlook will reflect that the email has been saved to the database by showing a value of "Yes".

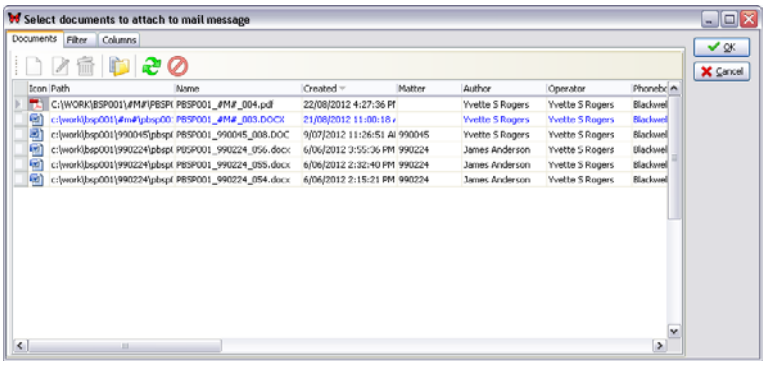
A duplicate is detected by a file name comparison (email messages are named with a description and the date/time they were sent).

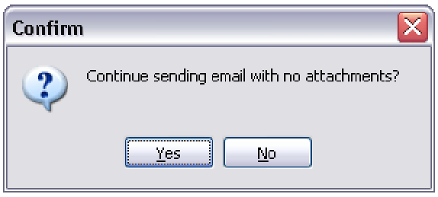
17.19 Disable Document Attachment Pop-up Windows

(1) A new option is available to disable document attachment pop-up windows when sending an email from the PhoneBook or a matter contact.

The option "Disable document attachment pop-up window when Emailing from Matter contacts or PhoneBook" is found under Utilities | User Options | Email.

When this option is selected, the following pop-up windows will be suppressed when emailing from the PhoneBook or the Contacts tab on a matter:





17.20 Insert Signature on Emails

(1) Outlook signatures will now be inserted on emails generated from Lexis Affinity. The signature must be set up in Outlook and be set for insertion on new emails.

Emails generated from some programs in Lexis Affinity (eg. eCollection and eBilling) will not have the default Outlook signature inserted as there are special options for signature insertion on these emails.

Note that inclusion of images (jpg, png etc) on signatures is not currently supported.

17.21 Default Action after Sending Email

(2) Lexis Affinity contains an option for what should happen to an email message after it has been sent from inside Lexis Affinity. The is found under System Variables | Email | Options | Email Message. The three options are:

Delete the message
Leave the message in Outbox folder
Move the message to the Sent folder

The default option has been changed. In previous versions of Lexis Affinity, the option "Delete the message" was the default. This has now been changed to "Move the message to the Send folder".

The Version Up program will retain the current database setting. However, if you click on the [Default] button, it will insert the new default option. New installations will use the new default.

18. Foreign Currency

IMPORTANT

The Enhancements described in this chapter relate to users who have enabled Foreign Currency.

18.1 Value of Cheques on "Cheques" tab on Matters

(1) The value of Cheques on the "Cheques" tab on the Matter screen could be incorrectly reported where the users displays foreign currency cheques in the local currency.
The values reported on the "Balances" tab were correct.

18.2 Client History tab

(1) Where a dataset includes more than one Entity with different currencies and a client has matters in different currency entities then the amounts are converted based on the following :-

If the matter entity is selected then currency is the currency of that entity
else if there is only 1 entity then it's the currency of the system
else if the default entity on the client is one of the entities in the matter entity combo box then it's that entity's currency
else if the default entity is in the matter entity combo box then it's that entity's currency
else the currency is from the first entity in the combo box.

The Financial Year End of the Entity selected also determines the first month of the financial year. (ie if an Entity has a Year end of December, the months will display from January to December.)

19. Combined Ledger Systems

IMPORTANT

The Enhancements described in this chapter relate to users who use the Combined Ledger System – ie a system of accounting using only one ledger for each matter. Currently this applies to some firms in New Zealand.

19.1 Transactions

19.1.1 Posting Investment Commission

(1) In cases where posting Investment Commission could cause the client or matter to overdraw the Trust balance, a System Check error could occur. This has been amended.

19.1.2 Receipt for Bills with Interest

(1) An error could occur if a receipt was posted to a bill that included interest. This has been corrected.

20. Setup for both e-Billing and e-Collection

This section contains information that is relevant to both e-Billing and e-Collection.

20.1 Document Types

Document Types are now known as Document Folders (Case Management | Document Management).

As part of the Version Up program – two new Document Folders may be created – (1) Client Bills and (2) Debtor Letter if these do not already exist

The upgrade will flag “Client Bills” as the default folder to be used when saving Bills. This can be changed to a pre-existing Document Folder if preferred.

The upgrade will flag “Debtor Letter” as the default to be used when saving collection letters *unless the def_DM_Type property exists within the Debtor Letter Template,* in which case the folder defined within the document property will be used.
Or you can change it to a pre-existing Document Folder if preferred.

20.2 System | Documents | e-Billing / e-Collection | Save Location

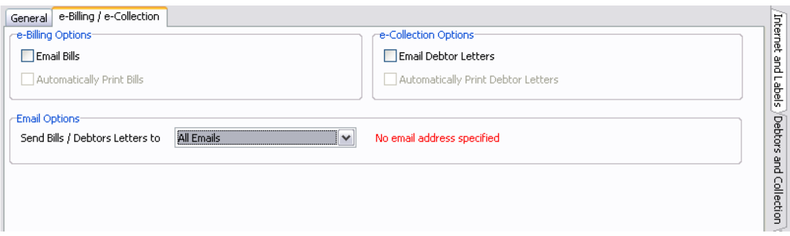
If you have Affinity Document Management installed, the system will save the pdf version of the document using the same settings as for saving word documents.

If you do not use Affinity Document Management, you can set the path. The path name supports Wordlink fields.

Documents will be automatically saved if:
a) the user has selected Post/Merge and the Auto-save | Bills system option is ticked or;
b) the user has selected Post/Merge/PDF or Post/Merge/PDF/Email.

20.3 PhoneBook

On Miscellaneous | Debtors and Collection | e-Billing / e-Collection tab, select the options for Bills and Debtor letters.



Existing PhoneBook records will not have an option selected, however new PhoneBook records will default to Email Bills if the system setting is Post/Merge/PDF/Email.

SQL

It is possible to run an SQL statement on your data files to automatically set the E-billing and E-Collection options on all PhoneBook records where at least one Email address is recorded.

The SQL statement to use is:

```
update phonebook set email_collection='Y' where email is not null or
email2 is not null or email3 is not null;

update phonebook set email_bill='Y' where email is not null or email2 is
not null or email3 is not null;

commit;
```

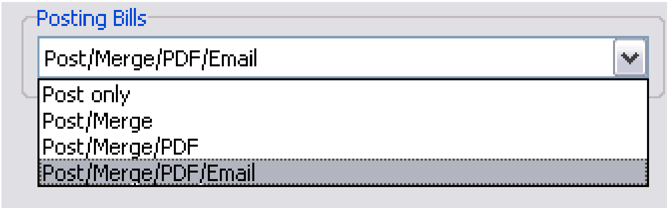
E-Billing Options
If “Email Bills” is ticked, then when posting a bill the default option will be “Post / Merge / PDF / Email”.
If “Automatically Print Bills” is ticked then the Word copy of the bill should be printed automatically if any option other than “Post only” is selected when posting a bill.

E-Collection Options
If “Email Debtor Letters” is left unticked, collection letters will behave the same as before.
If “Automatically Print Debtor Letters” is ticked, the Debtors letters will be printed automatically (ie same as before.).
If this option is NOT ticked then only an email version of the collection letter is created.

20.4 E-Billing Settings

20.4.1 System – Posting tab

In System Settings | System | Posting | Fees Billing and Allocations tab there are new options:



For automatically sending bills by Email, you should select Post/Merge/PDF/Email.

Options are:

Post Only same as for current Affinity.

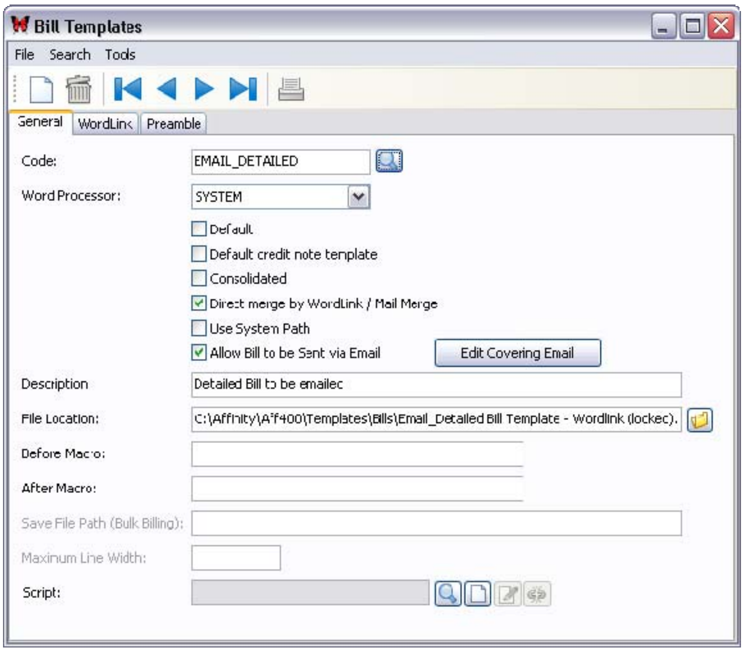
Post / Merge When the bill is posted, the word document is to be created and automatically saved (if auto-saving of Bills has been specified in System | Documents | Auto-save Document Types)

Post / Merge / PDF
as above. After the Word document is saved, create the PDF version and saved.

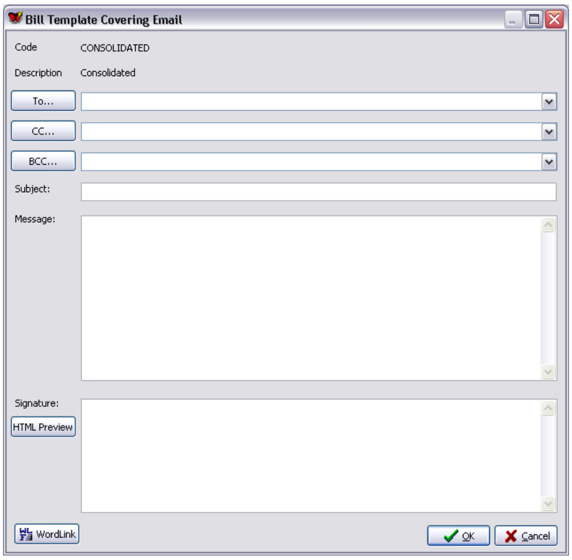
Post / Merge / PDF / Email
as above. After the PDF document is saved, the Email will be created with the pdf version of the bill attached.

20.5 Bill Templates

There is a provision in Bill Templates to indicate that the system should send PDF copies of bills as Emails and you need to create the covering email.



Click on Edit Covering Email to create the Email.



Click on To... CC... BCC... to open the Email Recipient dialog
OR

Click on the drop down arrow in To... to select from the list

OR
Type specific Email Addresses.

Signature

Email signatures can be inserted here. HTML formatting is supported.

Click on 

to check the display of the Signature.

WordLink

Wordlink fields can be inserted in the Subject, Message and Signature fields.
This will allow you to include information such as Matter Numbers, Authors and Bill Numbers.

20.6 PhoneBook

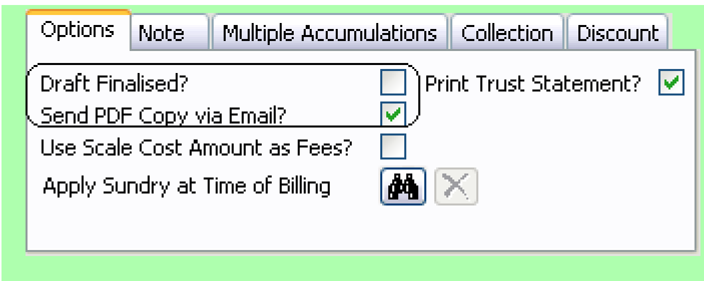
PhoneBook Filter

The filter now allows you to search one or all Email addresses and the “Extra” tab allows you to search for blank Email addresses.

20.7 Billing process

The Create / Edit Bill screen has a few minor modifications to field prompt names - Bill to Contact, Bill Template and Collection Plan to further clarify these fields.

Options tab



Draft Finalised (was Final Edit Copy)

This indicates that all edits have been done.
You can set the system so that you must tick this before posting the bill.
This can be useful if you process a lot of bills from the Bills List.
the setting can be found in System | Posting | Fees, Billing and Allocating.

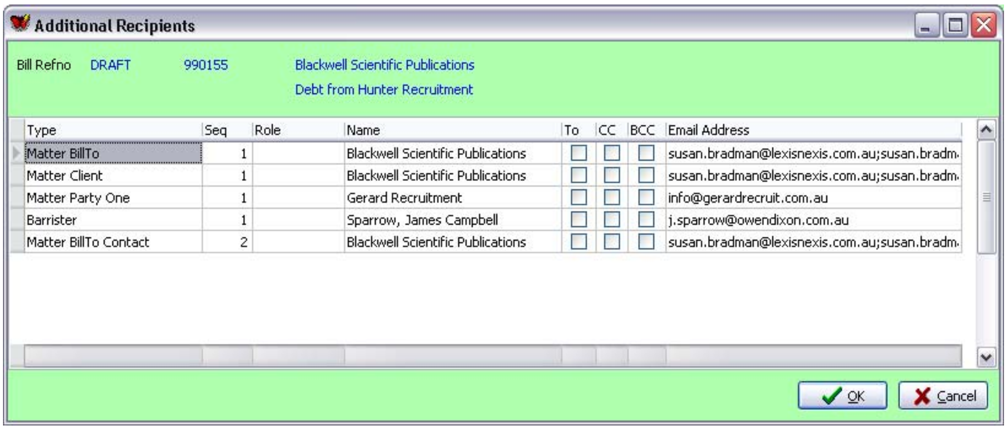
Send PDF Copy via Email?

This will be ticked by default if the PhoneBook record for the Bill to is flagged to have Bills emailed OR you can individually tick it.

Bill Creation / Edit screen

You can click on [icon] to open the PhoneBook record for the Bill to Contact. This will allow you to change any of the Email Addresses and return to the Bill screen.

You can click on [icon] next to *Additional Recipients*, and Affinity will display all the matter parties attached to the matter



Tick the To/CC/BCC buttons to include those parties.

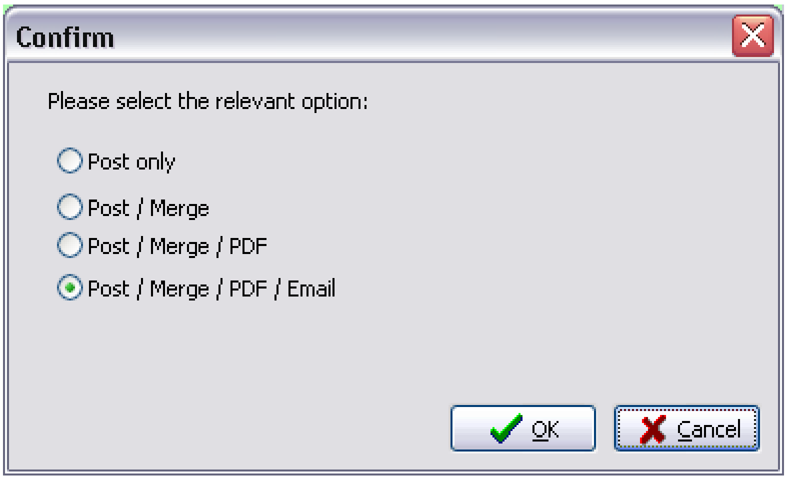
You can also edit the Email Addresses on this screen. These changes are NOT saved to the PhoneBook record, but will be applied to this bill.

The Bill screen will then show the number of Additional Recipients for this bill.

Printed Draft bills will include the main Email addresses on the first page, the Matter Summary includes a prompt for the Email setting, and an extra section “Additional Recipients” is included.

Bill Posting

Post the Bill. A dialog will display confirming your selection:



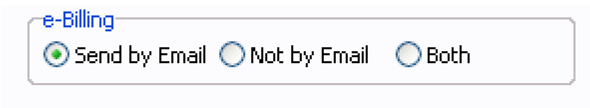
Select your option and click on **[OK]** to proceed and click on **[OK]** again.

The Word version of the bill will be created and saved, the pdf version will be created and saved and the email will be created. No Emails are automatically sent from this function.

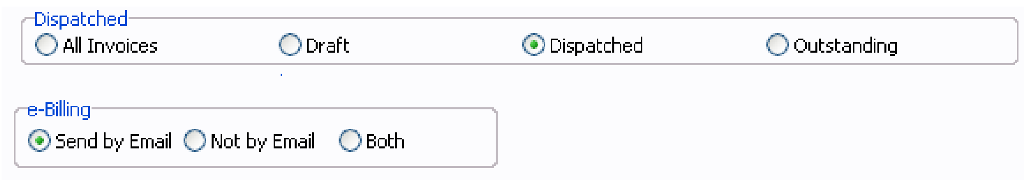
You can select the PhoneBook, Clients or Matter "Documents" tabs to see the documents.

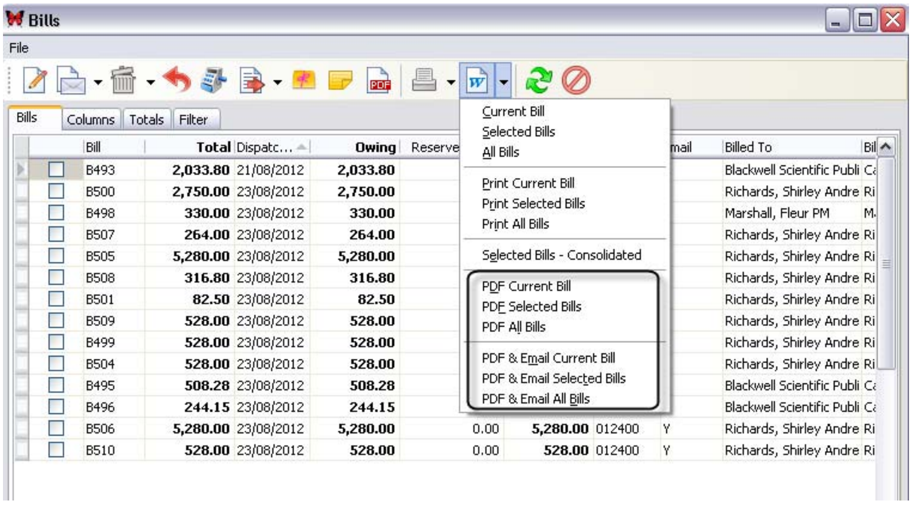
Bills List

The Bills Filter now has options to locate all bills based on the Email settings:



If you select Dispatched or Outstanding and "Send by Email" you can then create the PDF versions or create the PDFs and email the bills from the Bills List.





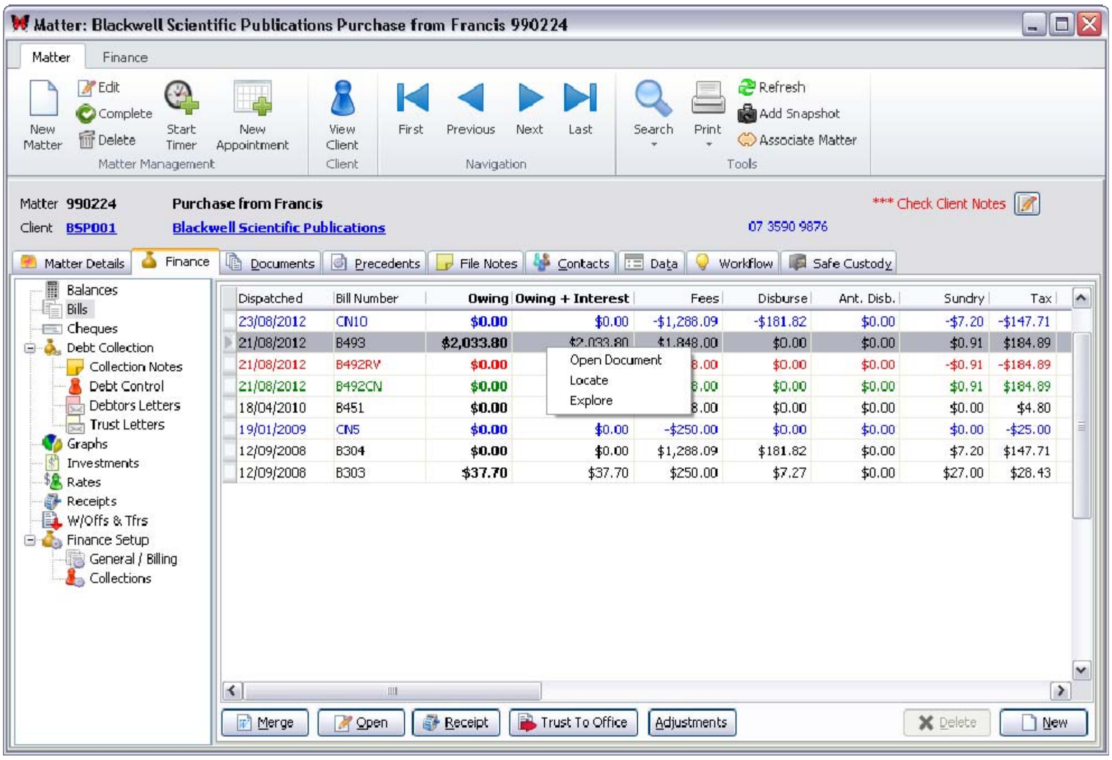
If you PDF and Email from the Bills List you have the option to automatically send the emails.

Bills on the Matter

Bills are found on the "Finance" tab

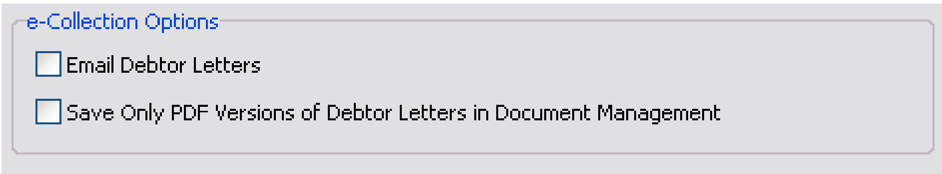
Right click on a bill to:

Open Document	opens the document selected
Locate	Switches to the Matter | Documents tab and selects the Word version of the selected bill.
Explore	Opens a Windows Explorer window to the folder that the document is stored in.



20.8 E-Collection - System – Client and Matter Alerts

In addition to the setup explained previously – an additional setting is on the Posting tab | Client and Matter Alerts



Email Debtors Letters

This option sets the default e-Collection setting for new PhoneBook records. It does not change existing PhoneBook records.

Save Only PDF Versions

If ticked, only the PDF version of debtor letters will be saved.
If not ticked, both the Word and PDF versions will be saved.

20.9 PhoneBook records

Set the E-Collection options – refer to page 66.

You can also set e-Collection options at the Client level.

20.10 Matters

The matter filter "Extra" tab also includes an option to filter by "Hold" status.

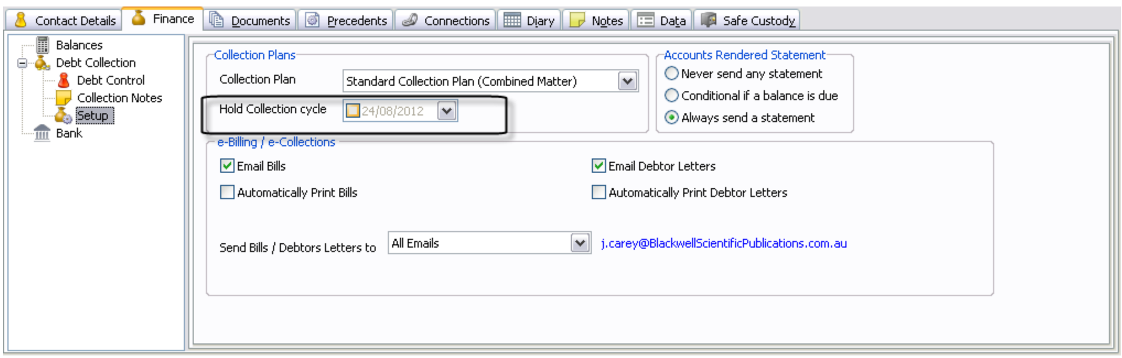
20.11 Hold Collection Cycle

A new feature of Affinity is to be able to hold the Collection Cycle. This has the effect of halting the production of letters and when the 'Hold" status is removed and the Collection letters run again the next letter will be produced as if the cycle had not been halted.

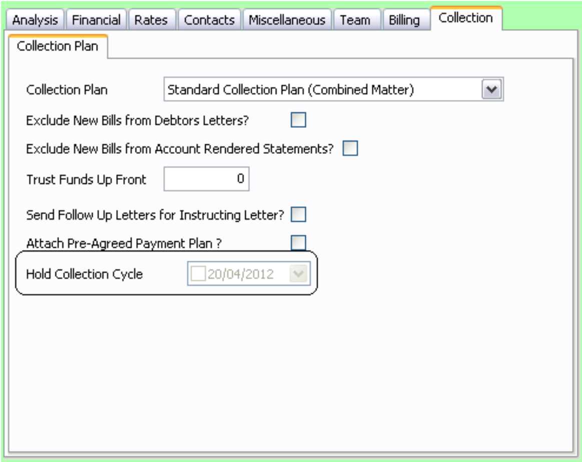
You will need to enable this in Security Settings on both the Matter and Phonebook level, as it is disabled after Version Up.

The Matter options are shown here:

You can hold the Collection Cycle for the PhoneBook entry or just individual matters.
For PhoneBook – select the "Finance" tab, Select Debt Collection and Setup.



On a matter – edit the “Collection” tab



PhoneBook Filter

A new option has been added to enable you to filter by “Hold” status.

20.12 Collection Plans

Debtors Letters, Part Payment letters and Account Rendered Statements are included in the e-Collection process.
There are now two types of Emails for these sections of Collection Plans.

Notification email – replaces the previous Email and is used to email internal people. This does not have the actual letter attached but can be set up to give a summary of what has been sent.

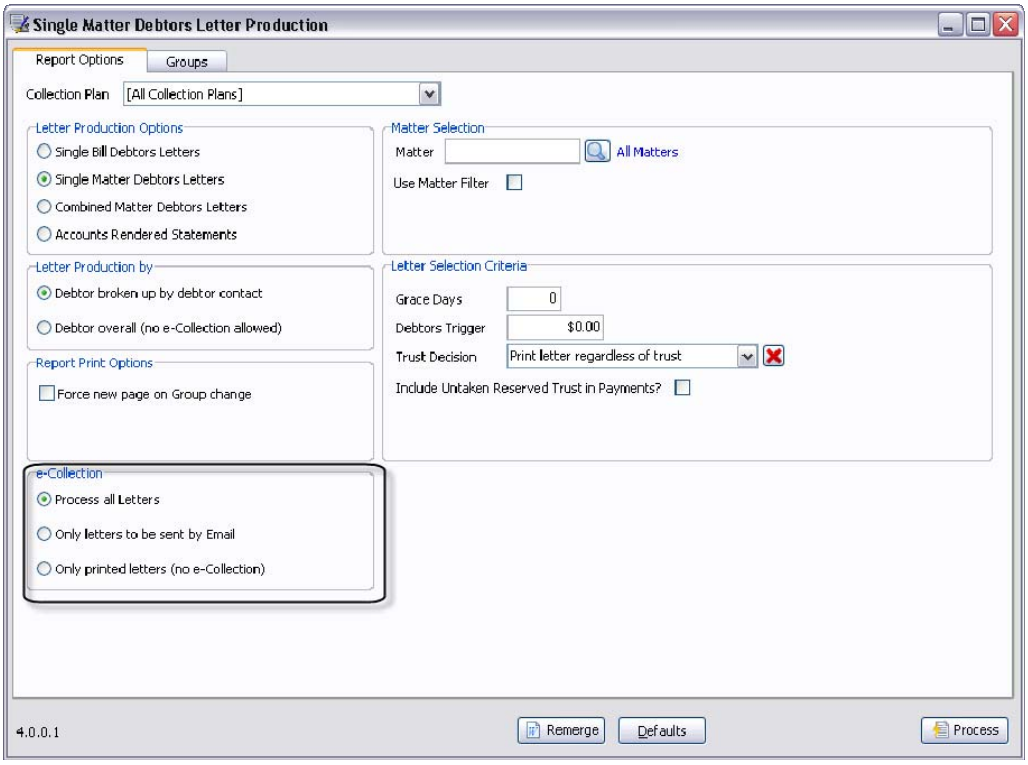
Covering email - used to accompany the Collection Letters and can be sent to internal and external parties.

Setting Up the Emails

The features are the same as for Debtors Letters – refer to Page 68.

20.13 Producing the Letters

The Letter Production screen has changed to include processing by Email settings.



Options are:

Process all letters –process all letters - where the matter / debtor is flagged to receive Debtor Letters by Email, letters will be converted to PDF and emailed, otherwise they will be printed.

Only letters to be sent by Email –process all matters where the matter / debtor is flagged to receive Debtor Letters by Email, letters will be converted to PDF and emailed.

Only printed letters (no e-Collection) – only process matters where the e-Collection option is not selected. In this case the letters will be printed.

Make your selections and Click on   Process

Production grid

The grid has new columns – “Hold” “Email” and “Email Address”

You can change the Hold status or the Email setting on the grid.
If you change the Hold status to Y on the grid - the letter will not be produced for this run only – but the next time you run the procedure this letters will be included.
To stop Collection letters for a length of time - put a hold on the PhoneBook entry or Matter level (or remove Collection plans all together).

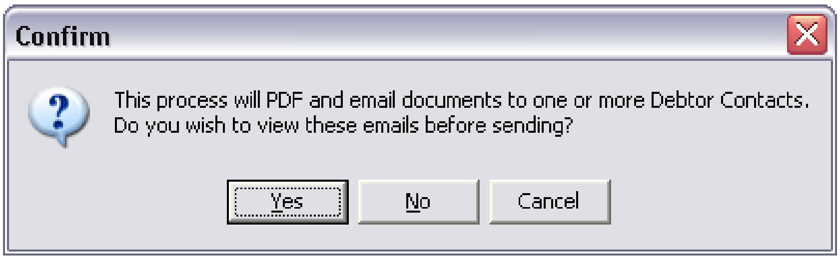
You can right click and open the PhoneBook entry. This allows you to change an email address, save the PhoneBook entry and return to the production grid.

Collection Plan report

The report ahs been amended to include the Email Address/es and the Hold Status.

Merge Process

When you click on Merge to produce the letters / emails, a message will display:



Click on Yes to check the emails before they are sent – you may prefer to do this in the early stages.

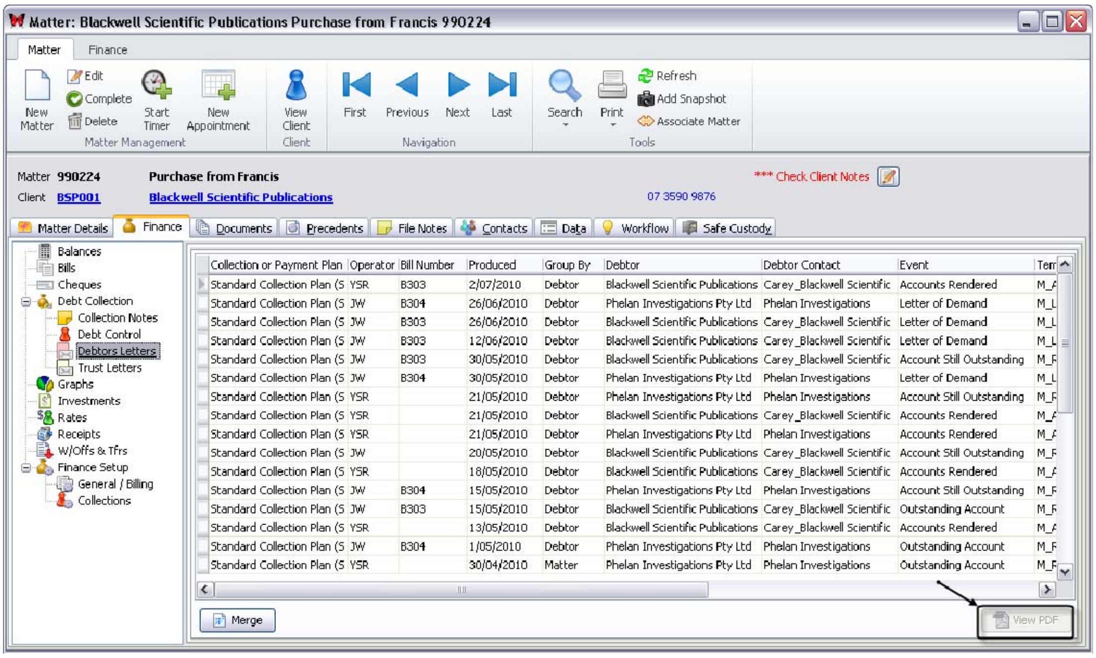
20.14 Displaying the PhoneBook, Client & Matters

Documents tab

Each letter that is sent will be displayed on the Documents tab for the PhoneBook, Client & Matter. If the letter is for a Combined Debtor or Matter, the individual details are not shown at the PhoneBook level but are available on the Matter screen.

Matter – Finance tab - Debtors Letters

A new icon has been added to this screen to allow you to open the PDF document.



Note this icon is enabled only when a PDF document is available.

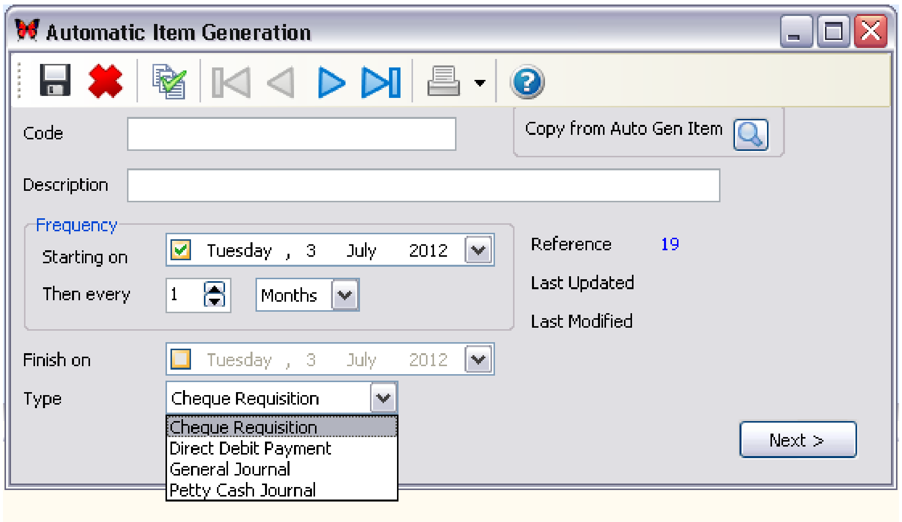
21. AutoGen

The AutoGen feature of Lexis Affinity Library allows you to record details of Cheque Requisitions, Direct Debit Payments and Journals (General Journals and Petty Cash Journals) that need to be processed on a regular basis.

The timing of the automation can be Daily, Weekly, Monthly or Yearly with a Start and Finish Date.

Note that running AutoGen will also cause any Journals that are marked as "Auto Reverse" to be reversed, if they are due for reversal and have not been reversed. This could happen if Journals have been backdated and the Auto Reverse date has been passed. (The AutoGen procedure must include at least one valid AutoGen item.)

When creating an AutoGen entry, you can copy from another AutoGen Item, or create one using the screen below.



21.1 Create New AutoGen Item

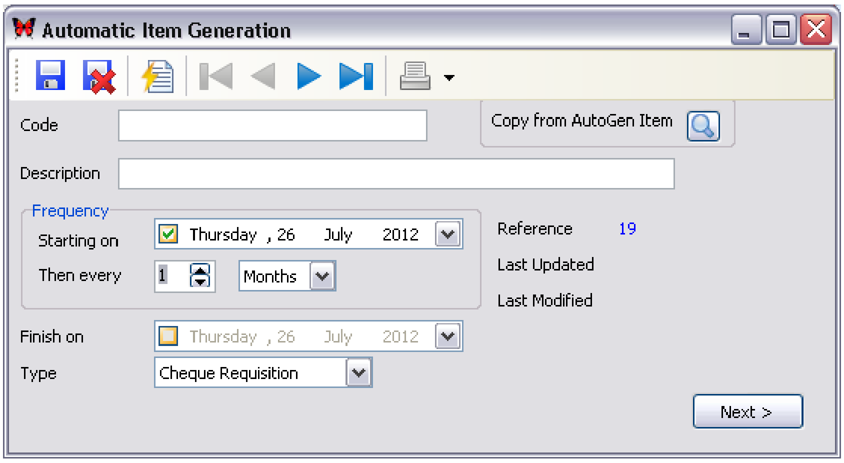
Hands on

In this exercise you will create an automatic journal entry for the recording of Depreciation. The date range should be from the end of this month to the end of the current financial year.

1. Open AutoGen (Transactions | Journals)

2. Click on  to create a new AutoGen entry

   The following screen displays:



3. *Code* DEPRECIATION

4. *Description* Depreciation for month

5. *Frequency / Starting on* Select the last day of the current Month

6. *Then every* 1 Month

7. *Finish on* Check this box and select the end of the current financial year

8. *Type* Select General Journal

9. Click on **[Next]**

   A General Journal screen displays.

10. *Reason* Enter a general description for the Journal entries –

    eg Depreciation for Month

11. *Entity* Accept the prompted Entity

12. *Branch* Accept the prompted Branch

13. *Ledger* Enter the expense account for Depreciation (2400)

    You can click on  to display and select the correct General Ledger Account.

14. Enter the amount in the Debit column

15. Complete the other columns as required

    Process the second entry:

16. *Ledger* Enter the GL Chart for the asset account (3401)

17. Enter the amount in the Credit Column

18. Complete the other columns as required

    You can enter as many lines in the grid as required.

19. Click on **[OK]** to process the entry

    Note that if this journal is to be automatically reversed, you can set this on the lower part of the screen.

20. Click on  to save the AutoGen entry

21.2 Print AutoGen entries

You can print a list of all the AutoGen entries by clicking on  or by clicking on the down arrow  and selecting **All Entries**

You can print one entry by clicking on the down arrow and selecting Current Entry.

The report will show the details of each AutoGen entry including the “Last Updated” and “Next Update On” dates.

21. Close the print display

21.3 Types of AutoGen entries

AutoGen entries can be created for the following types of entries.

Cheque Requisition

These can be for Matters or General Ledger Charts and Drivers can be applied to the GL Charts.

Direct Debit Payment

These are similar to a Cheque entry and can be for Matters or General Ledger Charts.

General Journal

These entries are for journal entries that are to be processed between two or more General Ledger Charts.
(This is the same as the Journals within the Transactions group).

Petty Cash Journal

These entries are for journal entries that are automatically posted to a nominated General Ledger Chart.
(This is the same as the Petty Cash Journals within the Transactions group).

21.4 Processing AutoGen entries

You should incorporate the processing of AutoGen entries into your daily processing. This can be done by setting AutoGen to run after Sign-In.

Run after Sign-In

Procedure

1. Highlight AutoGen (Transactions | Journals)
2. Right click AutoGen and select *Add to My Favourites*
3. Right click the icon in My Favourites and select *Run after Sign-In*

You will need to Sign out for this change to take place.

4. Sign into the system again
5. Click on 

   A processing screen will display the entries that are due to be processed

How to change the entries to be processed

For example you may wish to process all Direct Debit transactions, but no others.

You can untick items which should not be processed.

You can click on each heading to resort the grid.
OR
You can select the “Filter” tab to make a different selection based on Entity, Bank or Type.

Process the entries

When you have confirmed the selected items;

6. Click on 

   A message will display advising the number of entries that were processed.

7. Click on **[OK]**

   The grid will now show references for the entries processed and the next due date for those entries.

8. Close AutoGen