



Practice CS, v.2012.1.0  
User Bulletin 7666: Software Update

May 13, 2012

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## TO

All Practice CS® users.

This user bulletin explains changes made to this release of Practice CS.

## NEW SYSTEM REQUIREMENTS

With the 2012 Fall release of Practice CS (version 2012.2.0), we will discontinue support for Microsoft® SQL Server® 2005 (all editions). Practice CS will no longer function with this version of Microsoft SQL Server.

## ENHANCEMENTS

Many of the enhancements that are available in this update are protected by security privileges. If your firm has enabled firm security, please evaluate all enhancements and update your security groups as needed.

For additional information about enhancements, see the “What’s new in Practice CS” help topic. From the Help menu, choose Practice CS Help Topics, click the Contents button in the help browser, and then click “What’s new in Practice CS” at the top of the Contents frame.

Version 2012.1.0 of Practice CS includes the following enhancements.

### System

- You can now “pin” columns in grids by right-clicking the column heading and choosing Pin Column. Pinning a column freezes, or locks, the column in your view as you scroll horizontally through other columns.
- We have improved performance during the import of conversion data.
- When you insert standard text into comment fields or in the Compose tab of the Detail Billing screen, Practice CS places the cursor in the *ID* field by default.
- You can now resize drop-down lists, allowing you to make them bigger or smaller to accommodate the amount of data displayed.

### Integration

- You will be able to import invoices from Accounting CS™ version 2012.1.0, which will be available in late May 2012.
- You can set up projects in Practice CS to extend automatically when a client’s return is extended in UltraTax CS.®

### Dashboards

- Firm Dashboard
  - You can now filter the Staff Availability portlet on the Firm Dashboard to view only the currently logged in staff member. To do this, mark the *Logged-in Staff Only* checkbox.
  - The Staff Availability portlet now includes a Staff ID column, and a Field Chooser is available to select which columns display.

- Staff Dashboard
  - Grouping and filtering have been added to the Notifications portlet.
  - The Work Queue and Schedule Items portlets now include a Remaining Hours column and hash totals.
  - You can now use the Field Chooser to display custom fields in the Projects and Tasks portlets.

## Setup

- You can now merge two or more clients' historical data into one client record. Merging clients allows you to remove old or duplicate clients from your database while retaining historical data (time and expense entries, invoices, receipts, and so on) for reporting purposes by moving the data into one client record.
- You can now filter clients by complexity in Setup > Clients.

## Billing

The Detail Billing screen now opens more quickly when you have a large number of time and expense records available to be billed.

## Time and Expense Entry

- If your user preferences are set to allow only one running timer, you now have the choice to stop the current timer and start a new one, or leave the current timer running if you start a timer while one is already running.
- You can now display and edit custom fields as columns in the Time & Expense Entry screen. In User Preferences, you can choose to display, hide, or skip each custom field individually, giving you the ability to display only the frequently used custom fields.
- The new Staff user preference in Time & Expense Entry allows you to display a Staff Description column in the Overview tab of Time & Expense Entry.
- If you attempt to leave the Time & Expense Entry screen when there is an incomplete entry, you will be prompted to discard the entry or to stay on the screen and complete the entry.
- You can now use the keyboard to select tasks in the Task Selection dialog.
- You can now display tasks as a column in Time & Expense Entry. The Task column helps streamline data entry by allowing you to use only your keyboard to navigate the screen.
 

**Tip:** If you choose to display the Task column in user preferences, you may also want to skip and hide the Task Selection button, because it is not necessary to use both.
- Additional context-menu commands, available by right-clicking, allow you to quickly make changes to projects and tasks without leaving the Time & Expense Entry screen.
  - Project context-menu commands:
    - *Complete Project:* Sets the tracking description to completed and enters today's date as the actual complete date.
    - *Receive Project:* Sets the received date to today's date.
    - *Change Tracking:* Sets the tracking to the selected description.
  - Task context-menu commands:
    - *Complete Task:* Sets the tracking description to completed and enters today's date as the actual complete date.
    - *Change Tracking:* Sets the tracking to the selected description.
- We have improved performance for saving time and expense entries.

## Manage Projects

- You can now use the Field Chooser to display project and task custom fields in the Manage Projects screen.
- Additional context-menu commands on the Projects tab, available by right-clicking, allow you to quickly make changes to projects without opening the Project setup screen.
  - *Complete Project:* Sets the tracking description to completed and enters today's date as the actual complete date.
  - *Receive Project:* Sets the received date to today's date.
  - *Change Tracking:* Sets the tracking to the selected description.

- Additional context-menu commands on the Project Tasks tab, available by right-clicking, allow you to quickly make changes to tasks without opening the Task setup screen.
  - *Complete Task*: Sets the tracking description to completed and enters today's date as the actual complete date.
  - *Change Tracking*: Sets the tracking to the selected description.
- In the Task setup form, you can now quickly access the task's project by clicking a new Edit Project button in the lower left corner.

## Manage Clients

You can now use the Field Chooser to display client custom fields in the Manage Clients screen.

## Manage Staff

The Assign to command in the context menu now allows you to assign schedule items to the work queue.

## Reporting

- A new Engagement Templates list report is available in the Print Reports screen.
- We improved performance for all reports that use subreports, including the Billing Worksheet, A/R Summary, A/R Ledger, Invoice Journal, Project Listing, and Routing Sheet reports.
- We enhanced the drill-down capabilities in the Custom Formats screen.
  - You can now manually turn drill-down on or off for selected fields. To turn off the drill-down, in the Properties pane (under Behavior) select <None> for the DrillDownType.
  - Drill-down will automatically evaluate the formula for the field on which you are drilling down and filter the drill-down report for that amount.
- We added a date span formula to custom formats that calculates the number of years, months, weeks, or days between two dates.
- Double-clicking a field in the Fields pane now inserts that formula element at the current cursor position in the formula editor. This is helpful when constructing complicated formulas that incorporate multiple formula elements.

## SUPPORT

### Practice CS help

For step-by-step procedures, refer to the Practice CS help. To learn how to use the help, choose **Help > Practice CS Help Topics** and double-click the topic "Getting Help with Practice CS."

### Website

If you have questions or need assistance, you can visit our website at [CS.ThomsonReuters.com](http://CS.ThomsonReuters.com) 24 hours a day for access to our support knowledgebase and for the latest information on current issues and processing tips. To take advantage of this convenient means of accessing information, choose **On the Web** from the Practice CS Help menu, and then choose **Support Knowledgebase** or **Product Support and Services**.

### Email subscriptions

We issue software update notices via email. If you want to receive these notices, you must have an email account and sign up for the Email Subscription service. To sign up for the Email Subscription service, visit the My Account section of our website at [CS.ThomsonReuters.com](http://CS.ThomsonReuters.com). (Note that you must create a web account to sign up for email subscriptions.)

### Product support

To speak with a Product Support Representative, please call CS Support at (800) 968-0600, press **2** for Product Support, and then listen to the available options. Normal weekday support is available from 9:00 a.m. to 8:00 p.m. eastern time. For details on extended support hours for tax season and for our support hours for all CS Professional Suite<sup>®</sup> applications, please visit the Support section of our website (accessible from within Practice CS by choosing **Help > On the Web > Product Support and Services**).

