

ORION 4.6 RELEASE NOTES
November 4, 2014

NOTE: This Release Will Work Only with Pervasive 11. It will not work on any version earlier than 11.

1. Orion Admin - fixed problem where program crashed when attempting to add a new security group.
2. Contact/Client Name - fixed problem where you were only allowed to type in 50 characters. Now accommodates typing in 70 characters.
3. Print Checks - Use Reverse Order Check Numbering option now saved at User level.
4. Calendar Manager - fixed problem where if the Desktop was closed before closing Calendar Manager, user settings were not being saved.
5. Aged AR Report and AR Collections Report - fixed problem where report was not breaking correctly when using Client Total Descending Sort order.
6. Investment Report - fixed problem with error occurring when summary options chosen.
7. Recurring Tasks and Appointments - on an existing Appointment or Task, the "Recurrence" option under Tools is now inaccessible.
8. User Record - added option to ignore restricted settings when running reports.
9. User Record - added field to enter GL Department number on Attorney records (to work with new GL Live Program).
10. Changes to AR Collections Module - the following fields were added to the grid:

Matter EDI Billing (yes/no)
Appealed - field can be changed in Invoice Detail View Only
Appeal Date - field can be changed in Invoice Detail View Only
Appealed Amount - field can be changed in Invoice Detail View Only
Expected Pmt Amount - field can be changed in Invoice Detail View Only
Expected Pmt Date - field can be changed in Invoice Detail View Only
11. AR Collections - added ability to view data and perform functions on a Matter and a Client Level. Note that Collection Instructions are disabled when viewing at the Matter

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or Client Level - instead you will have to enter Journals. See the "changes to AR Collections" document for more details (Knowledge Base, Other, Release Notes section).

12. AR Collections Report - added Detail options to work with changes made in number 11 above. Added ability to enter the number of days worth of journals to include. Note that options available change based on detail level chosen.
13. AR Collections Report - added objects for EDI Billing, Appeal Date and Amount, Expected Payment Date and Amount. These fields have not been added to the standard style but are available to include on a custom report style.
14. NEW Basic Dashboards - My Performance Dashboard (Working View) and Firm Performance Dashboard. For an explanation of each, you can click on the Help Button while in each Dashboard. Both Dashboards can be secured by Security Group and the individual charts within each Dashboard can be secured.
15. NEW GL Live Financials - new module to make designing your financial statements easier. The module also allows you to provide access to other individuals in the firm to the Income Statements on-line (screen view versus you having to print). For more information on using this new feature, check out the Knowledge Base article on GL Live Financials.

NOTE - this module DOES NOT replace your existing GL Report Styler. We will not be re-designing your financial statements in GL Live but instructions on designing a statement are contained in the Knowledge Base article referenced above.
16. AP Imaging - Fix for PDF's not being displayed correctly at times.
17. Reimbursement Images - Fix to prevent new items from attaching to existing images which may have also caused the original item to lose its image.
18. Disabled ability to "Change ID" on FIRM Timekeeper ID. Also blocked Merge and Inactivate.
19. Timekeeper Budgets - do not list Non-Timekeepers in list of People to create budgets.
20. GL Account Status Drill Down - new field added for Voucher Description for transactions created by AP. The description is pulled from the related voucher distribution line. If no

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description exists on the distribution line, the description is pulled from the voucher header.