

Dear Client

AcuSoft HelpDesk

This has proved to be very successful and is providing us with a centralized help system and providing sites with the ability to manage the number of calls their staff are generating. As a reminder, anyone is able to send an email to support@acusoft.zendesk.com on the first email sent to this address they will be asked to confirm their email account by clicking on a link in the email they receive back from our helpdesk system. Once this is done they will be added to the Helpdesk, added to your organisation and their issue will be raised. After that any issue will be automatically raised.

Once the ticket is in the system all other users in your organisation will be able to see and comment on them, this will allow you to self help.

Although the system is available to all, please ensure that your staff are aware that this is not a free for all forum or for training.

Changes

FATCA

Oh FATCA, the subject of much discussion and debate! As you know we have a module that extracts information and generates files that can be uploaded to IGOR.

We have now rolled this out to over 30 sites with many of them already producing and submitting live extracts. This has become quite an involved module and there will be a few tweaks that we have picked from this initial round of submissions.

We will also be addressing the FATCA classifications to bring these in line with the latest “set”. We will update you with news shortly.

On a final point, some sites requested that the FATCA tab in the database should be set by user security permissions, we have set this up under (\Modules\Database\Specific Database Security) and have taken it away from everyone, you can add back where required.

AcuWIP (Time Recording)

AcuWIP has been in most sites for over a year now and has been very well received. In your next update all the old redundant forms will be removed from Acumen, these include

- Time and Disbursements screen
- Amend Delete WIP
- Time Clocks
- Transfer WIP

All of these functions are in AcuWIP we are just tidying Acumen, however, some users have noted that they were still using these forms, so please let your colleagues know! Don't forget the filters in the Amend\Delete WIP screen which allow you to narrow down your selection still further.

Acumen v2015

Work has progressed well and we are now well into the testing phase. We do in fact have two small trust sites running the basic Trust & Company side of the new version and we are receiving a lot of positive feedback.

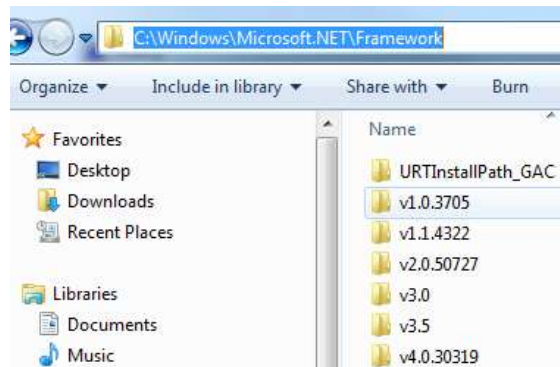
Our intention, after the 30th June, is to upgrade a couple of sites who have kindly “volunteered”. We will run these for several weeks and then we will be in a position to upgrade more sites.

Attached to this newsletter is a brief overview of what is in the new version

Dot Net

As a reminder for the requirements for any of the new system

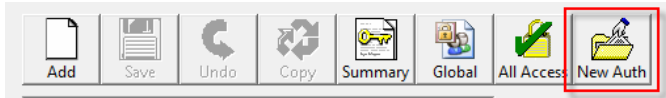
In order to use this new application and any future applications that we are planning working you will need to ensure that you users PC or Citrix\Terminal servers have the Microsoft Dot Net Framework installed with the version 4.0.30319. This must be the full version – not the client which doesn’t contain all the functionality. This can be found by using Windows Explorer and navigating to the folder C:\Windows\Microsoft.NET\Framework and you see the version you have installed for example:



For reporting you will need the Crystal install as well. This can be found at http://www.acumen-ci.com/downloads/Installs/CRRuntime_32bit_13_0_8.zip and can be installed with either a group policy or manually.

Authorisation Levels

Please note that we have split the authorisation levels. The original version can still be accessed via the Special – Authorisation Levels option, however within that there is a button to allow you access to the dotnet Authorisations that control, Work in Progress, Contacts, Tasks, AcuReview etc.



Select the user from the first screen. Then click on User Security Setup. On the left hand side you can narrow down your selection by clicking on the appropriate button. For example Work In Progress, displays all the security options for this module only.

Security Groups
Employee Specific
Portal
Entity
Tasks
Contacts
Work in Progress
Reports
Table Codes
Show All Security

On the right is the list of options available. Click and select Assigned\Denied. Right clicking allows you to assign it to multiple staff as well as selecting all options in the current module etc.

Application	Ribbon Bar Item	Current User Permission	Inherited	Description
WIP	Auto Start WIP	<input checked="" type="radio"/> Assigned <input type="radio"/> Denied <input type="radio"/> Not Set	No	When the user first logs in do the WIP module automatically load
WIP	View Another User's Time	<input checked="" type="radio"/> Assigned <input type="radio"/> Denied <input type="radio"/> Not Set	No	Can this user view other employees WIP
WIP	Edit Own Time	<input checked="" type="radio"/> Assigned <input type="radio"/> Denied <input type="radio"/> Not Set	No	Can this user edit their own historic WIP. Any WIP approved, billed or written off is locked
WIP	Enter Disbursements / Fixed Values	<input checked="" type="radio"/> Assigned <input type="radio"/> Denied <input type="radio"/> Not Set	No	Can the user enter Disbursements and or Fixed Values
WIP	Approve Timesheet	<input checked="" type="radio"/> Assigned <input type="radio"/> Denied <input type="radio"/> Not Set	No	Can this user Approve WIP, only available if the site has the Approve WIP module
WIP	Amend/Delete WIP	<input checked="" type="radio"/> Assigned <input type="radio"/> Denied <input type="radio"/> Not Set	No	Can the user amend and or delete WIP
WIP	Transfer WIP Between Entities	<input checked="" type="radio"/> Assigned <input type="radio"/> Denied <input type="radio"/> Not Set	No	Can the user transfer WIP between entities
WIP	All Staff Events	<input checked="" type="radio"/> Assigned <input type="radio"/> Denied <input type="radio"/> Not Set	No	Can the user view and or edit WIP for multiple staff members (Bank Holidays, Sick, Training etc)

- Import Security
- Assign Current Module
- Deny Current Module
- Select All
- Clear All
- Global Update of Authorisation Level
- Export to Excel

The Save\Undo buttons have moved and appear on the top left hand corner of each screen, along with the ability to select open screens and take a screenshot from within the application.



Information

Work in Progress

We have recently been asked to clear down a client's Work in Progress table removing all data which was older than a given date. We are happy to run this on any site, as this will make the Work in Progress run more efficiently and decrease the overall size of the database. Anyone wanting to do this, please email us to discuss this further.

Training

With time and staff turnover, sometimes the level of knowledge within your organization can fall until you find that your staff are only using the basic functionality of the system. Why not schedule some training to help improve the output, quality and usage of the system? We train groups of up to 5 staff in sessions from 1 to 2 hours long depending on the section of Acumen/AcuFund/AcuPen/AcuReview.

I Didn't Know That....

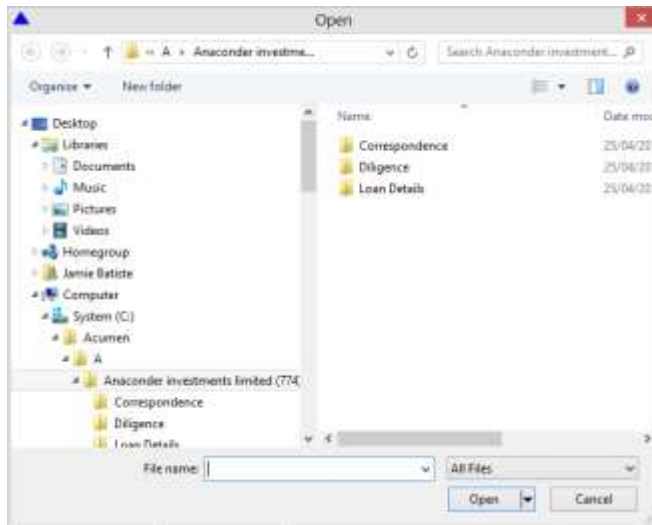
Filing can be awkward. Why not centralize your recording of client correspondence, diligence and other communications within Acumen.

You can set up standard folders to hold specific information simply by populating the System Control File (Special – System Control File)

The highlighted section will allow you to create a specific folders structure.

User Defined Titles				
Key	Database	Contact	Create Extra Contact Folders	Create Extra Entity Folders
1	Annual Review	Deceased	Diligence	Billing Narrative
2	Entity Type	In Probate	Correspondence	
3	Company Services	Requires Copies	Loan Details	
4	Disb...	De Mat Contact		

Then from the Contacts screen (Modules – Contacts – New/Amend Contacts) select “Goto Contacts Folder” or from the Modules - Goto Correspondence for an entity.



The folders are created automatically when you open this dialogue. Documents will open direct from Acumen.

Please note this feature requires a path or server location set – please contact us if you have issues or a warning pops up when using this.