



# Setup Guide

*for*

## CPA Inprotech WorkBenches

Release 4.0



How to initially set up CPA Inprotech WorkBench Modules (Professional, Marketing, and Client) after a first-time installation.

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# Introduction

## Checklist for a New Installation

Aimed at a new WorkBench installation the checklist below provides you with an overview of all installation and set up tasks necessary to get WorkBenches up and running for the first time. *Check that each and every task has been completed.*

| TASK  | DETAILS   | ✓ |
|---|---|---|
| 1 Is the Physical Environment correctly set up?                 | Design and set up the physical environment, i.e. database and web server.   |   |
| 2 Is WorkBench Licensing setup?                                 | Ensure you have the appropriate WorkBench Licences. The <b>Licensing</b> program must be run in order to log in onto CPA Inprotech. Confirm licensing has been set up by logging on using <a href="#">SYSADM</a> for your Login ID and Password.                                      |   |
| 3 Is the WorkBenches software installed?                        | <a href="#">See the "CPA Inprotech WorkBench Modules Installation Guide"</a> .  |   |
| 4 Have you tested the Installation?                             | <a href="#">See "Accessing WorkBenches for the First Time" on page 2.</a>   |   |
| 5 Have you published your Data for the Client WorkBench?        | If your clients want to view information relating to their case portfolio you must determine the level of information to be displayed.<br>If you are converting from the Web Access Module (WAM) <a href="#">see See "Appendix B: WAM – Client WorkBench Conversion" on page 104.</a> |   |
| 6 Has all required WorkBench functionality been implemented?    | <a href="#">See "WorkBenches Functionality Table" on page 5</a> for the list of available functionality for staff and client users.   |   |
| 7 Have you set up appropriate user access to all functionality? | Access is controlled via Roles and Portal Configurations.   |   |
| 8 Have you set up client access?                                | Access Accounts ensure clients view only their own case portfolio.  |   |
| 9 Have you set up WorkBench users?                              | <a href="#">See "User Administration" on page 27</a> for how to set up staff and client users.  |   |



## Accessing WorkBenches for the First Time

If you are accessing WorkBenches for the first time it is important to:

- test the installation
- review your firm's Access Account
- review the Administrator user's details.

## Testing the Installation

### To test an installation

- 1 Type the URL in a browser, for example,  
`http://[servername]/CPAInpro`
- 2 Login to CPA Inprotech WorkBenches using:
  - Login ID: `Administrator`
  - Password: `Administrator`

On successful login an initial **Terms and Conditions** dialog is displayed detailing your firm's use of the WorkBench Modules.
- 3 Accept the Terms and Conditions.
- 4 If this message displays: *"You have not been granted access to any web parts"*, you need to set up licensing for yourself as a user.



#### Tip

If you do not have a Windows Domain Account Name with a Login ID of Administrator, you can either:

- Set up Administrator as an Account Name, or
  - Modify the installation of WorkBenches to Forms Authentication only, and then test the installation.
- See the "Modifying End User Authentication Modes for CPA Inprotech WorkBench Modules" document for details on modifying your installation.

## Setting Up Licensing

### To grant access to your Administrator user

- 1 Access **Security** via the CPA Inprotech Launchpad.
- 2 Select **Tools > Licensing** from the menu.
- 3 Select the **WorkBench Users** option.
- 4 Locate the WorkBench user in the Login Id column that was used to test the installation.
- 5 Double-click in the Administrator WorkBench column for the Login Id. The digit '0' changes to '1'.
- 6 Click [Save] and then [Close].

## Reviewing Your Access Account

Before setting up WorkBench users, it is recommended that you review the internal Access Account and modify information if required.

### To review the Internal Access Account

---

- 1 Access WorkBenches as the Administrator user.
- 2 Search for and display the Access Account for your firm.
- 3 Ensure the Account Name is correct.
- 4 Click the Name link in the Names being Accessed topic to display the details of your organisation.  
Any incorrect details must be updated via **Names** in CPA Inprotech.
- 5 Review the Administrator user details as outlined in the next procedure.

**Tip**

Select the Internal Checkbox when searching for the internal account.

## Reviewing Administrator User Details

The details for the user Administrator should be reviewed before configuring WorkBenches and setting up users.

### To review the Administrator User from your Access Account

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- 1 Click the Administrator Login ID link to display the **User Maintenance** window.
- 2 Review the information on this tab and change if required.
- 3 Click [Save].

## Checklist for an Upgrade Installation


The checklist below provides you with an overview of all installation and set up tasks necessary to upgrade an existing WorkBench installation and get WorkBenches up and running. Check that every task has been completed.

| TASK   | DETAILS   | ✓ |
|--|---|---|
| 1 Is the WorkBenches software installed?                           | See the <a href="#">“CPA Inprotech WorkBench Modules Installation Guide”</a> .  |   |
| 2 Did you review the New WorkBenches Functionality?                | Review the current <a href="#">“CPA Inprotech Release Notes.”</a>   |   |
| 3 Has all required new WorkBenches functionality been implemented? | Implement the new functionality as required.<br>See <a href="#">“WorkBenches Functionality Table”</a> on page 5 for the list of available functionality for staff and client users. |   |
| 4 Have you set up appropriate user access to all Functionality?    | Review existing Roles and Portal Configurations to ensure users have access to the new functionality.   |   |

## WorkBenches Functionality Table

The table in this section outlines the functionality that can be made available to:




- internal WorkBenches users (i.e. staff members)
- external WorkBenches users (i.e. clients).

 Access to this functionality is controlled through Licensing. The appropriate WorkBench and CPA Inprotech Module licences must be purchased and set up before users can be granted access to WorkBench functionality.

Once the appropriate licenses are set up, you can limit the functionality by granting or denying access to web parts, tasks and subjects in the role/s assigned to a user. The Concepts section of this chapter describes the purpose of Roles in WorkBenches.

### Symbols used in Functionality Table

The Required Permission / Site Control column in the Functionality Table contains the following symbols and conventions:

| SYMBOL  | INDICATES  |
|---|--|
| PROFESSIONAL  | Functionality relating to the <b>Professional WorkBenches</b> Module.  |
| MARKETING   | Functionality relating to the <b>Marketing WorkBenches</b> Module.   |
| CLIENT  | Functionality relating to the <b>Client WorkBenches</b> Module.  |
| CLERICAL  | Functionality relating to the <b>Clerical WorkBenches</b> Module.  |
| CRM   | Functionality relating to the <b>Customer Relationship Management WorkBenches</b> Module.<br><b>Note:</b> The CRM WorkBench will be available in a subsequent release. |
|  | Permission to a <b>Web Part</b> must be granted before using the functionality.  |
|  | Permission to a <b>Task</b> must be granted before using the functionality.  |
|  | Permission to a <b>Subject</b> must be granted before using the functionality.   |
| <u>Site Control</u>   | A site control must be set because it governs the behaviour of a feature.<br>Site Controls are set up in CPA Inprotech.  |

Chapter references for this guide appear beneath features that require further implementation steps in either WorkBenches and/or CPA Inprotech.

















### Site Controls










Site Controls allow you to specify your firm's preferred way of working with WorkBenches. Many of these Site Controls are also used by other CPA Inprotech Modules such as **Names**, **Cases**, **Time & Billing** and so on. Individual Site Controls are described throughout this guide in the appropriate areas. Site Controls are set up in the **Site Control** program accessed via the CPA Inprotech Launchpad.



















## Categories of Functionality

The Functionality Table is divided up into the following categories in this order:









|                      |                       |                       |                 |
|----------------------|-----------------------|-----------------------|-----------------|
| User Administration  | Correspondence        | Marketing Information | Reporting       |
| Links Administration | Financial Information | Portfolio Management  | Time Management |
| Cases & Names        | General Functionality | Reminders             | WIP Management  |
| Contact Management   |                       |                       |                 |














| WORKBENCH FUNCTIONALITY   | PROFESSIONAL | MARKETING | CLIENT | CLERICAL | CRM* | Required PERMISSION and/or SITE CONTROL   |
|---|--------------|-----------|--------|----------|------|---|
| USER ADMINISTRATION   |              |           |        |          |      |   |
|  The following functionality only applies to the Internal Administrator.  |              |           |        |          |      |   |
| <b>Create and maintain Access Accounts</b><br>See "Setting up Access Accounts" on page 33.  |              | ✓         |        | ✓        |      |  Access Accounts<br> Maintain Access Account  |
| <b>Create and Maintain Portal Configuration</b><br>See "Setting up Portal Configurations" on page 28.   | ✓            | ✓         |        | ✓        |      |  Portal Configurations<br> Maintain Portal Configuration  |
| <b>Create and maintain Roles</b><br>See "Setting up Roles" on page 27.  | ✓            | ✓         |        | ✓        |      |  Roles<br> Maintain Roles   |
| <b>Create and Maintain Users</b><br>This includes creating external Usernames, changing Passwords and User Preferences.<br>See "Internal WorkBench Users" on page 29 and "External WorkBench Users" on page 32. |              | ✓         | ✓      | ✓        |      |  Users<br> Maintain Users<br> Create External User Name<br> Change User Password<br> Maintain User Preferences |
| <b>Set maximum Number of Logons for a User Account</b><br>This forces users to be locked out if the number is reached.<br>See "Setting Maximum Logon Attempts for Users" on page 35.                            | ✓            |           | ✓      | ✓        |      |  Maintain Users<br><u>Max Invalid Logins</u>   |
| <b>Create and maintain default Preferences for your firm</b>  |              | ✓         |        | ✓        |      |  Maintain Default Preferences  |
| <b>Enable/disable the automatic time-out functionality</b><br>i.e. automatically close the current session of WorkBenches when idle for too long.<br>See "Automatic Time-Out" on page 45.                       |              | ✓         | ✓      | ✓        |      | <u>Time out internal users</u><br><u>Time out external users</u>  |
| <b>Check expiry date of time-based licenses for Modules and receive user notifications regarding approaching license expiry dates.</b><br>See CPA Inprotech Licensing Implementation Guide.                     |              |           |        |          |      | <u>Product Support Email</u><br><u>Licence Admin Email</u>  |
| LINKS ADMINISTRATION  |              |           |        |          |      |   |
| <b>Set up and maintain links to local or internet elements most often used by your organisation</b><br>See "Setting Up Quick Links" on page 54.   | ✓            | ✓         | ✓      | ✓        |      |  Quick Links Administration<br> Maintain Link   |






| WORKBENCH FUNCTIONALITY  | PROFESSIONAL | MARKETING | CLIENT | CLERICAL | CRM* | Required PERMISSION and/or SITE CONTROL  |
|--|--------------|-----------|--------|----------|------|--|
| CASES & NAMES  |              |           |        |          |      |  |
| <b>CASES</b>   |              |           |        |          |      |  |
| <b>Advanced Case Search</b><br>Allows you to create, maintain and run predefined Case Searches and nominate a default search.  | ✓            |           | ✓      | ✓        | ✓    |  Advanced Case Search<br> Maintain Case Search<br> Run Saved Case Search<br><u>Name Variant</u> |
| <b>Quick Case Search</b>   | ✓            |           | ✓      | ✓        | ✓    |  Quick Case Search  |
| <b>Auto-list your most frequently accessed cases in My Case List web part</b><br><a href="#">See "Setting up the My Case List" on page 51.</a>   | ✓            |           | ✓      | ✓        | ✓    |  My Case List<br> Maintain Default Case Search   |
| <b>Access case attachments</b><br><a href="#">See "Attachments" on page 57.</a>  | ✓            |           | ✓      | ✓        | ✓    |  Attachments<br><u>WorkBench Attachments</u>  |
| <b>View Case details</b><br> Cases displayed in the Client WorkBench can be restricted by Case Type. The names, text types and standing instructions displayed for a case can also be restricted.<br><a href="#">See "Restricting Cases" on page 66.</a> | ✓            |           | ✓      | ✓        | ✓    | No changes to user's role needed.<br><a href="#">Client Case Types</a><br><a href="#">Client Instruction Types (3.4)</a><br><a href="#">Client Name Types Shown</a><br><a href="#">Client Name Types</a><br><a href="#">Client Text Type</a><br><u>Name Variant</u>  |
| <b>View extra Case Summary information</b><br>Includes the Sub Type (of Property case types), Instructor Name Code (against an Instructor name) and Renewal Instruction (description).   | ✓            |           |        | ✓        |      | <u>Client Instruction Types</u> set to 'R'   |
| <b>Print Case details in a PDF format</b><br><a href="#">See "Verifying the ABCPDF Utility for Printing PDFs" on page 98.</a>  | ✓            | ✓         | ✓      | ✓        | ✓    |  |
| <b>Access and modify client case information</b><br>Includes viewing details, running searches and reports, as well as being able to modify certain client Case Details.<br><a href="#">See the "CPA Inprotech WorkBench Modules User Guide".</a><br><a href="#">See "Modifying Client Case Details (4788)" on page 67.</a>              | ✓            |           |        | ✓        | ✓    |  Connect As (client user)   |




















| WORKBENCH FUNCTIONALITY  | PROFESSIONAL | MARKETING | CLIENT | CLERICAL | CRM* | Required PERMISSION and/or SITE CONTROL  |
|--|--------------|-----------|--------|----------|------|--|
| <b>Set the Initial Sort Order of cases shown on the Related Cases topic</b><br>See "Setting up a Related Case List" on page 51.  | ✓            |           | ✓      | ✓        |      | No changes to user's role needed.<br><a href="#">Related Cases Sort Order</a>  |
| <b>E-mail the staff member responsible for a case</b>  | ✓            | ✓         | ✓      | ✓        | ✓    |  Email Case Responsible Staff (internal)<br> Email Our Case Contact (external)   |
| <b>Advanced Client Request Search</b><br>Allows you to create, maintain and run predefined Request Searches.   | ✓            | ✓         | ✓      | ✓        | ✓    |  Advanced Client Request Search<br> Maintain Client Request Search<br> Run Saved Client Request Search  |
| <b>Quick Client Request Search</b>   |              | ✓         |        |          | ✓    |  Quick Client Request Search  |
| <b>Advanced Case Fee Search</b><br>Allows you to create, maintain and run predefined Searches relating to Case Fees & Charges.<br>See "Generating the 'Case Fee Budget' Report" on page 69 for clients and on page 77 for staff users. | ✓            |           | ✓      | ✓        |      |  Advanced Case Fee Search<br> Maintain Case Fee Search<br> Run Saved Case Fee Search<br> Fees and Charges Calculations   |
| <b>Quick Case Fee Search</b>   | ✓            |           | ✓      |          | ✓    |  Quick Case Fee Search  |
| <b>Add and maintain case details such as Case Names</b>  |              |           |        | ✓        |      |  Maintain Case<br><a href="#">LANGUAGE</a><br><a href="#">Case Event Default Sorting</a><br><a href="#">Case Screen Default Program</a><br><a href="#">Additional Internal Staff (3.4)</a><br><a href="#">Name Variant (3.4)</a>   |
| <b>Issue Instructions on-line for cases</b><br>Allows you to do so in bulk or on a per case basis<br>See "Setting up Instruction Definitions (2982/4634)" on page 51.  | ✓            |           | ✓      | ✓        |      |  Provide Bulk Instructions<br> Provide Case Instructions<br> Advanced Case Instruction Search<br> Maintain Case Instruction Search<br> Provide Due Date Instructions<br> Fees and Charges Calculations |










| WORKBENCH FUNCTIONALITY  | PROFESSIONAL | MARKETING | CLIENT | CLERICAL | CRM* | Required PERMISSION and/or SITE CONTROL  |
|--|--------------|-----------|--------|----------|------|--|
| Compare case details on your database with those on an external system (e.g. the USPTO Private or Public PAIR, USPTO TARR or EPO databases)<br><a href="#">See "Configuring USPTO Case Comparison functionality" on page 54.</a>         | ✓            |           |        | ✓        |      |  View Case Data Comparison<br><a href="#">USPTO Public PAIR Enabled</a><br><a href="#">USPTO Private PAIR Enabled</a>   |
| Mask dead cases<br><a href="#">See "Masking Dead cases from the Total Case Count" on page 67.</a>  |              |           | ✓      |          |      | <a href="#">Client Exclude Dead Case Stats</a><br><a href="#">Client Importance</a>  |
| Update case details retrieved via a Case Data Comparison with an external system (e.g. the USPTO PAIR Private or Public PAIR, USPTO TARR or the EPO database)<br><a href="#">See the CPA Inprotech Data Mapping Configuration Guide.</a> | ✓            |           |        | ✓        |      |  Save Imported Case Data  |
| View web links that are relevant to a case<br><a href="#">See "Setting up Case Links" on page 49.</a>  | ✓            |           | ✓      | ✓        |      | No changes to user's role needed.  |
| View Fees & Charges calculations<br><a href="#">See "Setting up Permissions to do Fees &amp; Charges Calculations" on page 56</a>  | ✓            |           | ✓      | ✓        |      |  Calculate Case Fees<br> Fees & Charges Calculations<br> Fees and Charges Estimates<br> Fees and Charges by WIP Category<br> Fees and Charges by Rate Calculation<br><a href="#">Renewal Fee</a><br><a href="#">Main Renewal Action</a><br><a href="#">Lapse Event</a><br><a href="#">TAXREQUIRED</a> |
| Record the physical location of a file for a case  | ✓            |           | ✓      | ✓        |      |  Maintain File Location<br>MAXLOCATIONS   |
| Set the maximum number of rows in the Case Fee Search Report   | ✓            |           |        |          |      | <a href="#">Case Fees Report Limit</a>   |
| Maintain case classes  |              |           |        | ✓        |      |  |













| WORKBENCH FUNCTIONALITY  | PROFESSIONAL | MARKETING | CLIENT | CLERICAL | CRM* | Required PERMISSION and/or SITE CONTROL   |
|--|--------------|-----------|--------|----------|------|---|
| Maintain designated countries for cases filed at multi-country IP Offices  |              |           |        | ✓        |      |  Maintain Case Security  |
| Copy details from an existing case into a new case   |              |           |        | ✓        |      |  Copy Case Security  |
| Upload image files for storage against a case  |              |           |        | ✓        |      | <u>WorkBench Max Image Size</u>   |
| Enter events and official numbers for cases via a Docketing Wizard.  |              |           |        | ✓        |      |  Docketing Wizard<br> Maintain Case<br> Maintain Ad Hoc Date<br><u>CASEDETAILFLAG</u>  |
| Case checklists  |              |           |        | ✓        |      |  Checklist   |
| <b>Cases world map</b><br>Allows you to view a world map showing where dead, registered and pending cases are for particular IP offices throughout the world.<br>See "The Cases World Map" on page 63. | ✓            | ✓         | ✓      | ✓        | ✓    |  Cases World Map   |
| <b>NAMES</b>   |              |           |        |          |      |   |
| Store notes against a name   |              | ✓         |        |          |      |  Annotate Names  |
| Maintain name attributes   |              | ✓         |        | ✓        | ✓    |  Maintain Name Attributes  |
| <b>Advanced Name Search</b><br>Allows you to create, maintain and run predefined Name Searches.  | ✓            | ✓         | ✓      | ✓        | ✓    |  Advanced Name Search<br> Maintain Name Search<br> Run Saved Name Search<br><u>Name search with both keys</u><br><u>Name Variant</u> |
| Quick Name Search  | ✓            | ✓         | ✓      | ✓        | ✓    |  Quick Name Search   |
| View Name Details  | ✓            | ✓         |        | ✓        | ✓    | <u>Name Variant</u>   |

| WORKBENCH FUNCTIONALITY   | PROFESSIONAL | MARKETING | CLIENT | CLERICAL | CRM* | Required PERMISSION and/or SITE CONTROL   |
|---|--------------|-----------|--------|----------|------|---|
| <b>Allow client users to view their name details</b><br><a href="#">See "Displaying Name Aliases" on page 68.</a>   |              |           | ✓      |          |      |  Client Names<br><a href="#">Client Name Alias Types</a>   |
| <b>E-mail the staff member responsible for a client</b>   | ✓            |           | ✓      | ✓        | ✓    |  Email Our Name Contact  |
| <b>Access name attachments</b><br><a href="#">See "Attachments" on page 57.</a>   | ✓            | ✓         | ✓      | ✓        | ✓    |  Attachments<br><a href="#">WorkBench Attachments</a>  |
| <b>View Home Page web link associated with a client</b><br><a href="#">See "Names" on page 76.</a>  | ✓            | ✓         |        | ✓        | ✓    | <a href="#">Telecom Type – Home Page</a>  |
| <b>Maintain addresses for a Name</b>  |              |           | ✓      |          |      |  Maintain Name<br> Maintain addresses linked to Names<br> Maintain addresses used by Cases |
| <b>Maintain telecom contacts list for a Name.</b>   |              |           |        | ✓        |      |   |
| <b>Maintain Associated Names for a Name.</b>  |              |           |        | ✓        |      |   |
| <b>Maintain Standing Instructions for a Name.</b>   |              |           |        | ✓        |      |   |
| <b>Delete a Name</b>  |              |           |        | ✓        |      |   |
| <b>CONTACT MANAGEMENT</b>   |              |           |        |          |      |   |
| <b>Display, record and maintain contact activities</b><br>Activities include phone calls, e-mails or correspondence.<br><a href="#">See "Marketing Information" on page 83.</a> |              | ✓         |        |          |      |  Maintain Contact Activity<br> Contact Activities   |

| WORKBENCH FUNCTIONALITY  | PROFESSIONAL | MARKETING | CLIENT | CLERICAL | CRM* | Required PERMISSION and/or SITE CONTROL  |
|--|--------------|-----------|--------|----------|------|--|
| <b>Advanced Contact Activity Search</b><br>Allows you to create, maintain and run predefined Contact Activity Searches.                                    |              | ✓         |        |          |      |  Advanced Contact Activity Search<br> Maintain Contact Activity Search<br> Run Saved Contact Activity Search  |
| <b>Quick Contact Activity Search</b>   |              | ✓         |        |          |      |  Quick Contact Activity Search  |
| <b>CORRESPONDENCE</b>  |              |           |        |          |      |  |
| <b>Generate ad hoc documents</b><br>See "Ad Hoc Word Documents" on page 85.  | ✓            |           |        | ✓        | ✓    |  Create Word Documents  |
| <b>Create/maintain Document Request Types</b><br>See "Setting up Document Request Types (4710)" on page 86.  | ✓            |           |        | ✓        |      |  Maintain Document Request Type   |
| <b>FINANCIAL INFORMATION</b>   |              |           |        |          |      |  |
| <b>View Billing History, Billing Instructions, Prepayments, Accounts Receivable, Work In Progress information</b>  | ✓            | ✓         | ✓      | ✓        | ✓    |  Billing History<br> Billing Instructions<br> Prepayments<br> Receivable Items<br> Work In Progress Items |
| <b>View charges applying to various fees, Accounts Payable information and Supplier Details</b>  | ✓            | ✓         |        | ✓        | ✓    |  Fees and Charges Calculations<br> Payable Items<br> Supplier Details  |
| <b>GENERAL FUNCTIONALITY</b>   |              |           |        |          |      |  |
| <b>Access frequently used links, set up by your firm, to locations on the internet or on your local server</b><br>See "Setting up Quick Links" on page 58. | ✓            | ✓         | ✓      | ✓        | ✓    |  Quick Links  |
| <b>Set up and maintain frequently used links to locations on the internet or on your local server</b>  | ✓            | ✓         | ✓      | ✓        | ✓    |  My Links<br> Maintain Personal Link   |
| <b>View user details and change password</b>   | ✓            | ✓         | ✓      | ✓        | ✓    |  My Details<br> Change my Password   |



| WORKBENCH FUNCTIONALITY  | PROFESSIONAL | MARKETING | CLIENT | CLERICAL | CRM* | Required PERMISSION and/or SITE CONTROL  |
|--|--------------|-----------|--------|----------|------|--|
| <b>View the list of recently occurred Events (i.e. What's New list).</b><br>Events displayed can be limited for the Client WorkBench by using the Client Importance flag.<br><a href="#">See "Displaying Events" on page 68.</a><br><a href="#">See "Filtering Events" on page 77.</a> | ✓            |           | ✓      | ✓        |      |  What's New<br><u>Client Importance</u><br><u>Events Displayed</u>  |
| <b>View notes stored against events</b><br>Event notes can be hidden from Client WorkBench users.<br><a href="#">See "Event Definition &amp; Notes" on page 69.</a>  | ✓            |           | ✓      | ✓        |      | <u>Client Event Text</u>   |
| <b>View the critical dates for a case</b><br><a href="#">See "Setting up Events" on page 59.</a>   | ✓            |           | ✓      |          |      | No changes to user's role needed.<br><u>Critical Dates – Internal,</u><br><u>Critical Dates – External</u>   |
| <b>View additional information for CPA Renewals</b><br><a href="#">See "Events" on page 77.</a>  | ✓            |           |        | ✓        |      | No changes to user's role needed.<br><u>CPA Date Start,</u><br><u>CPA Date Stop</u>  |
| <b>Hide the CPA icon for cases renewed by CPA</b><br><a href="#">See "Identifying CPA Renewal Dates" on page 69.</a>   |              |           | ✓      |          |      | No changes to user's role needed.<br>Clients Unaware of CPA  |
| <b>DUE DATES</b>   |              |           |        |          |      |  |
| <b>View a list of outstanding Due Dates (i.e. What's Due)</b><br>The display of overdue dates can be restricted for client users.<br><a href="#">See "Due Dates" on page 72.</a>   | ✓            |           | ✓      | ✓        |      |  What's Due (Ext. WorkBench)<br> What's Due List (Internal WorkBenches)<br> What's Due Calendar (Internal WorkBenches)<br><u>Client Due Dates: Overdue Days</u> |
| <b>Advanced Due Date Search</b><br>Allows you to create, maintain and run predefined Due Dates Searches and nominate a default search.   | ✓            |           | ✓      | ✓        |      |  Advanced Due Date Search<br> Maintain Due Date Search   |
| <b>Store notes against a Due Date</b><br>The Client WorkBench can be configured to display these in the hover text when the mouse is moved over the event.   | ✓            |           | ✓      | ✓        |      |  Annotate Due Date  |
| <b>View event category icons and critical flags in the What's Due Calendar</b><br><a href="#">See "What's Due" on page 78.</a>   | ✓            |           | ✓      |          |      | No changes to user's role needed.<br><u>CRITICAL LEVEL</u>   |

| WORKBENCH FUNCTIONALITY  | PROFESSIONAL | MARKETING | CLIENT | CLERICAL | CRM* | Required PERMISSION and/or SITE CONTROL  |
|--|--------------|-----------|--------|----------|------|--|
| <b>Maintain Instruction Definitions</b><br>Allows you to set up instructions within WorkBenches.<br><a href="#">See "Setting up Instruction Definitions (2982/4634)" on page 51.</a>     | ✓            |           | ✓      | ✓        |      | See the "Issue Instructions on-line for multiple cases" feature in this table under "Cases".   |
| <b>STAFF PERFORMANCE STATISTICS</b>  |              |           |        |          |      |  |
| <b>View your performance statistics</b><br><a href="#">See "Staff Performance Statistics" on page 88.</a>  | ✓            |           |        |          |      |  My Statistics<br><a href="#">Trading Terms (shows the Days Beyond Terms statistic)</a><br><a href="#">Standard Daily Hours</a>                 |
| <b>REMINDERS</b>   |              |           |        |          |      |  |
| <b>AD HOC DATES</b>  |              |           |        |          |      |  |
| <b>View a list of Ad Hoc Dates</b>   | ✓            | ✓         |        | ✓        | ✓    |  Ad Hoc Dates   |
| <b>Advanced Ad Hoc Date Search</b><br>Allows you to create, maintain and run predefined Ad Hoc Dates Searches and nominate a default search.   | ✓            | ✓         |        | ✓        | ✓    |  Advanced Ad Hoc Date Search<br> Maintain Ad Hoc Date Search |
| <b>Create and maintain Ad Hoc Dates</b><br>Includes the ability for your staff to set up and maintain reminders for ad hoc dates for staff and client WorkBench users.                   | ✓            | ✓         |        | ✓        | ✓    |  Maintain Ad Hoc Date   |
| <b>Finalise Ad Hoc Dates</b><br> Ad hoc dates can also be finalised from the To Do list.                 | ✓            | ✓         | ✓      | ✓        | ✓    |  Finalise Ad Hoc Date   |
| <b>Create and maintain standard ad hoc date templates</b><br>Each template contains a standard message and reminder settings.<br><a href="#">See "Ad Hoc Word Documents" on page 85.</a> | ✓            | ✓         |        | ✓        | ✓    |  Maintain Ad Hoc Template   |
| <b>REMINDERS</b>   |              |           |        |          |      |  |
| <b>View a list of outstanding reminders (i.e. To Do list)</b>  | ✓            | ✓         | ✓      | ✓        | ✓    |  To Do  |
| <b>Advanced Reminder Search</b><br>Allows you to create, maintain and run predefined Reminder Searches and nominate a default search.  | ✓            | ✓         |        | ✓        | ✓    |  Advanced Reminder Search<br> Maintain Reminder Search   |
| <b>View reminders as tasks and appointments in Microsoft Outlook</b><br><a href="#">See "Setting up Reminders" on page 81.</a>   | ✓            | ✓         |        |          |      |  Exchange Integration<br><u>CRITICAL LEVEL</u>  |

[illegible]



| WORKBENCH FUNCTIONALITY   | PROFESSIONAL | MARKETING | CLIENT | CLERIC |
|---|--------------|-----------|--------|--------|
| <b>View, record, maintain and post Timesheet entries</b><br>You can display Warning and Error Messages for Name Restrictions, Credit Limits, Budgets and Prepayments. Users given permission to the Maintain Time Value can change the total value (in local currency) of the current timesheet entry. Otherwise this value is auto-calculated using the total number of units and charge-out rate for the staff member.<br><a href="#">See "Time Management" on page 81.</a> | ✓            | ✓         |        |        |
| <b>WIP MANAGEMENT</b>   |              |           |        |        |
| <b>Advanced WIP Overview Search</b><br>Allows you to create, maintain and run predefined WIP Overview   | ✓            |           |        |        |
| <b>Produce</b><br><a href="#">See "Rep</a>  |              |           |        |        |

WorkBench User

**Licensing**  
Identifies the WorkBench modules that the user is licensed to access. For external users, licenses are granted to Access Accounts, not to individual users.

\* The CRM WorkBench will be available in a subsequent release.

**Access Account**  
Identifies the organisation that the user belongs to. For external users, the Access Account determines the company names they can access.

**Portal Configuration**  
Identifies the layout of the information, including the tabs and location of Web parts on each page. Each user must be assigned a Portal Configuration.

**Role**  
Identifies the Web Parts, Tasks and Subjects that a user can access. Multiple roles can be assigned to a user.

The screenshot shows the 'Create User' form with several fields and lists. Annotations with dashed arrows point from the conceptual boxes to specific parts of the form:

- An arrow points from the 'Access Account' box to the 'Access Account' dropdown menu, which currently shows 'Maxim Yarrow and Colman'.
- An arrow points from the 'Portal Configuration' box to the 'Portal Configuration' dropdown menu.
- An arrow points from the 'Role' box to the 'Available List' of roles, which includes 'All Internal', 'Fee Earner', 'Filing Clerk', 'Report Template Author', and 'System Administrator'.
- Another arrow points from the 'Role' box to the 'Selected List' table, which is currently empty and shows a header with 'Delete', 'Role', and 'Description'.

The form also includes fields for 'Name', 'Email Address', 'Login ID', 'New Password', and 'Confirm Password'. At the bottom, there are 'Save' and 'Cancel' buttons.

## Concepts

### WorkBench Users

The WorkBench Modules are a flexible system that can be tailored to suit the needs of staff and client users. The functionality available to users will vary, depending on the permissions granted via their Role and their Portal Configuration. If a user is unable to access or use specific functionality, it is recommended that you review the permissions defined in the role assigned to the user.

As new functionality is added to WorkBenches, the Administrator must review and update the permissions defined in the Roles assigned to users who require access. For some functionality the Administrator Role must be granted access to new Web Parts, Subjects and Tasks before they can grant access to other WorkBench users.

## Licensing

Access to WorkBench Modules is controlled by Licensing. There are two types of licences available:

- **Unlimited Users Licence** – for which there is no limit to the number of WorkBench users that can be set up to access a WorkBench Module
- **Named Users Licence** - for which only nominated internal WorkBench users or external Access Accounts can access the required WorkBench Module

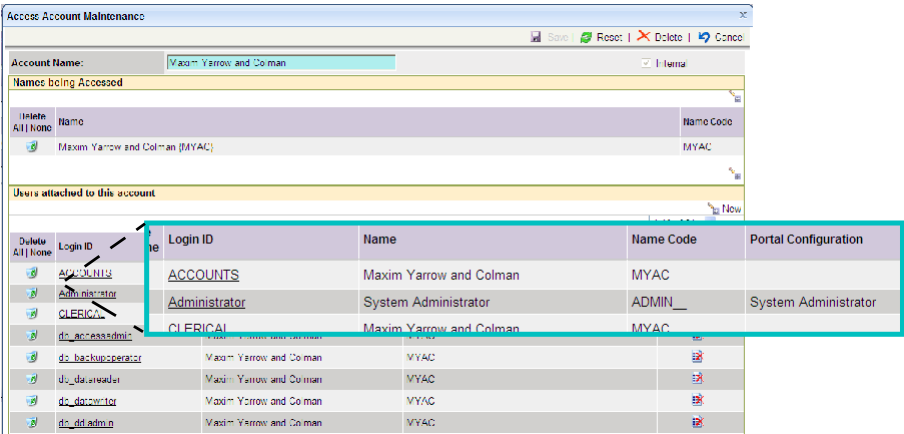
Licences are set up in **Security** in CPA Inprotech. The method used to set up a licence depends on the type of licence purchased (i.e. Unlimited Users or Named Users) and the type of Module being licensed (i.e. internal or external). The following table outlines the required setup.

|                 | INTERNAL WORKBENCH<br>MODULE<br>(e.g. Professional WorkBench)                       | EXTERNAL WORKBENCH<br>MODULES<br>(e.g. Client WorkBench)   |
|-----------------|---|--|
| UNLIMITED USERS | No setup required.  | No setup required.   |
| NAMED USERS     | Nominate each WorkBench user who requires access to the Module in <b>Security</b> . | Nominate each external Access Account (i.e. client organisation) that requires access to the Module in <b>Security</b> .<br>All users associated with these Access Accounts are able to access the Module. |

## Accounts

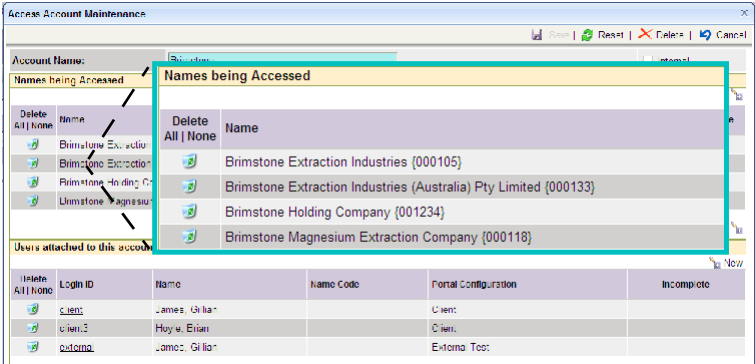
All WorkBench users must belong to an Access Account. This account determines the information that can be accessed by WorkBench users. Access Accounts are defined as internal for your firm and external for your clients.

The Access Account based on your firm’s name entity that is defined in CPA Inprotech is classified as an internal account. All staff members who require access to WorkBenches must be assigned to this account.



An external Access Account must be set up for each client organisation wanting to view its case portfolio via the Client WorkBench. In most situations, the access account for a client is based on its name entity (either individual or organisation) that is set up in CPA Inprotech.

Some organisations that have parents, subsidiaries and so on may be represented as separate name entities. In this scenario, all name entities for the organisation must be listed in the Access Account so that the client user can view all data related to the organisation.



## Portal Configuration

A Portal Configuration consists of Tab windows and Web Parts. The portal configuration determines the basic structure for displaying information on the WorkBench windows. It consists of:

- the **Tab** windows that are displayed
- the position of the **Web Part** on each tab.

Portal configurations are defined as either:

- **internal**, making them available to your staff
- **external**, to be used by your clients.

Tabs defined in your Portal Configuration are automatically displayed when WorkBench is accessed..



**Web Part** - a logical grouping of information that forms a discrete piece of functionality.

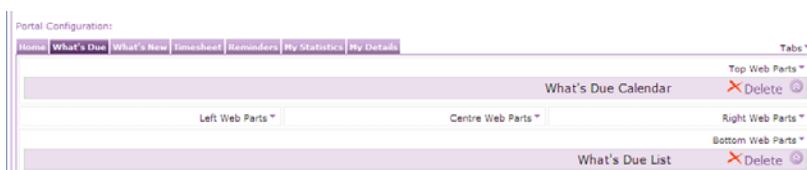
## Tab Windows

There are two types of tab windows:

- **Static tabs** – are displayed when WorkBench is first accessed. These are configured via Portal Configuration and cannot be closed. Each must contain at least one web part that the user has been granted access to. These display only if the user has been granted access to one or more web parts located on the tab.
- **Dynamic tabs** – are displayed as you access information through links or searches. These windows are not maintained via Portal Configuration and can be closed by clicking [Close].

## Web Parts

Web parts can be located at the top, left, centre, right or bottom of a tab and are maintained via Portal Configuration.



### TIP

A tab will only display if access is granted to one or more web parts on the tab for the current user.

Areas that do not contain a web part are collapsed and hidden when the tab is displayed. Only web parts that the current user has access to are displayed. The access to web parts is determined by the role/s assigned to the current user.

## Roles

Roles are used to define the security access rights (i.e. permissions) to web parts, tasks and subjects that a person or group requires to complete their daily work. Roles are classified as internal, for staff members or external, for clients. You can create as many roles as required by your firm and multiple roles can be assigned to a WorkBench user.

**Web Parts:** - a logical grouping of information that forms a discrete piece of functionality.

**Tasks:** - actions that a WorkBench user can perform which invoke functionality with the WorkBench.

**Subjects:** - subgroups of information existing within one or more Web Parts. They appear in topics which are the boxes on a tab.

The screenshot shows the WorkBench interface with the following components:

- Navigation Bar:** Home, What's New, My Statistics, Ad Hoc Dates, Timesheet, Relationship Search, Reciprocity Search, Marketing Event Reports, Marketing Events, + Add a page.
- Search Bar:** Search Case for: [ ] GO Run Search Case Advanced Search
- My Statistics Section:**
  - Hours:** Days Since Timesheet Posted: 3557
  - Accounts Receivable:**

| Currency                 | Current | 1 Period | 2 Periods | 3 Periods + | Total     | Prepayments |
|--------------------------|---------|----------|-----------|-------------|-----------|-------------|
| Totals In Local Currency |         |          |           |             |           |             |
| AUD                      | 0.00    | 0.00     | 0.00      | 34,264.18   | 34,264.18 | 6,000.00    |
| Balance By Currency      |         |          |           |             |           |             |
| AUD                      | 0.00    | 0.00     |           |             |           |             |
| USD                      | 0.00    |          |           |             |           |             |
- Show Statistics:** For my Case (Staff member) Personal
- Work In Progress:**

| Currency                 | Current | 1 Period | 2 Periods | 3 Periods + | Total     |
|--------------------------|---------|----------|-----------|-------------|-----------|
| Totals In Local Currency |         |          |           |             |           |
| AUD                      | 0.00    | 0.00     | 0.00      | 20,738.47   | 20,738.47 |
| Balance By Currency      |         |          |           |             |           |
| AUD                      | 0.00    | 0.00     | 0.00      | 17,345.00   | 17,345.00 |

## System Roles

Three system roles are delivered with WorkBenches:

- **Users** – this role contains the system permissions for all WorkBench users.
- **Internal** – this role contains system permissions for all internal (staff member) users.
- **External** – this role contains the system permissions for all external (client) users.

**i** These roles *cannot* be deleted but can be modified to suit your firm's requirements. These contain the general access permissions for WorkBench users. More specific permissions can be granted to a WorkBench user by attaching roles that are defined by your firm.

These roles are automatically assigned when a user is created. For example, if you are setting up a WorkBench user for a staff member, the user and internal roles are automatically attached.

## Assigning Multiple Roles

Multiple roles can be assigned to a user. The final set of access rights is a combination of the permissions defined in each role. The final set of permissions can be reviewed from the **User Maintenance** window by selecting the View Permissions link.

**EXAMPLE: Setting up a User Profile for a Fee Earner**

Professional staff members can have the following roles assigned to their User Profile:

**User Role, Internal Role and Fee Earner Role.**

**User Role**

The user system role applies to all users and may be set up with the following permissions

- **Web Parts:**
  - My Details,
  - Welcome.
- **Tasks:**
  - Change my Password
  - Maintain my Portal Configuration.

**Internal Role**

This role applies to all staff users and may be set up with Permissions to:

- **Web Parts:**
  - My Statistics,
  - To Do,
  - What's Due,
  - What's New.
- **Tasks:**
  - Search related tasks,
  - Email Case Responsible Staff,
  - Annotate Due Dates.

**Fee Earner Role**

This role may be set up with Permissions to just these

- Subjects:**
- Billing History,
  - Billing Instructions,
  - Fees and Charges Calculations,
  - Payable Items,
  - Prepayments,
  - Receivable Items,
  - Work In Progress Items.



The final combination of permissions for the above three roles are:

User Maintenance

Save | Reset | Delete | Cancel

Access Account: Maxim Yarrow and Colman [Change Password](#)

Please identify the person to be granted access. Either choose an existing name from the pick list, or create a new name.

Name: Grey, George (GG) [View Permissions](#)

Email Address: george.brown@maximyarrowandcol.com.au [Change Preferences](#)

Login ID: internal

Locked: ☐

Portal Configuration: Internal Test

Role:

Available List

- All Internal
- Fee Earner
- Filing Clerk
- Report Template Author
- System Administrator

User Permissions

Refresh | Print

Permissions for: Grey, George

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| Web Part           | Mandatory |
|--------------------|-----------|
| Access Accounts    | ✓         |
| Ad Hoc Dates       | ✓         |
| Campaign Reports   | ✓         |
| Campaigns          | ✓         |
| Case Simple Search | ✓         |

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| Task                             | Execute | Insert | Update |
|----------------------------------|---------|--------|--------|
| Advanced Ad Hoc Date Search      | ✓       |        |        |
| Advanced Case Fee Search         | ✓       |        |        |
| Advanced Case Instruction Search | ✓       |        |        |
| Advanced Case Search             | ✓       |        |        |
| Advanced Client Request Search   | ✓       |        |        |

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| Subject              |
|----------------------|
| Attachments          |
| Billing History      |
| Billing Instructions |
| Contact Activities   |
| Employer Information |

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| Module                          | Licensed | Expiry Date |
|---------------------------------|----------|-------------|
| Administrator WorkBench         |          |             |
| Clerical WorkBench              | ✓        |             |
| Client WorkBench Administration | ✓        |             |
| CRM WorkBench                   | ✓        |             |
| Managers WorkBench              | ✓        |             |

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# User Administration

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## Setting up Roles

System Roles are delivered with the WorkBenches. These roles can be modified to suit your firm's needs or new roles can be created and maintained by the Administrator as required. System Roles cannot be deleted.

### To create or maintain a role

---

- 1 Login to WorkBenches as Administrator.
- 2 Click the **Roles** tab.
- 3 To:
  - create new role, click [New].
  - modify an existing role, search for it and then click the Role Name link.
- 4 Ensure the *Role Name*, *Description* and *External* fields are correct.
- 5 Select the required *Features* and set the permissions for:
  - *Web Parts – Access* and *Mandatory* checkboxes
  - *Tasks – Execute*, *Add*, *Update* and *Delete* checkboxes as applicable.
- 6 Set the *Subject Permissions*.
- 7 Click [Save].

 Changing a web part in an existing role to mandatory causes a warning message to be displayed. If you continue with the process, a new tab containing the mandatory web part is automatically added to the Portal Configuration of each user with this role.



#### TIPS

If you are converting from the **Web Access** Module to the Client WorkBench, [see Appendix B on page 104](#).

To see what task and web parts are associated with a feature, hold the mouse over the feature.

## Setting up Portal Configurations

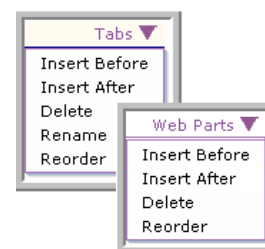
The basic structure for displaying information on tabs is known as the Portal Configuration. It consists of the static tabs that are displayed and how the web parts are positioned on each of them.

### To set up tabs in a portal configuration

- 1 Login to WorkBench as Administrator.
- 2 Select the **Portal Configurations** tab.
- 3 To:
  - create a new portal configuration, click [New].
  - modify an existing Portal Configuration, click the Name link.
- 4 Complete the *Portal Name* and *Description* fields.
- 5 Define the tabs by selecting the appropriate action from the *Tabs menu*.
- 6 Define the web parts by selecting the appropriate action from the *Web Parts menu*.

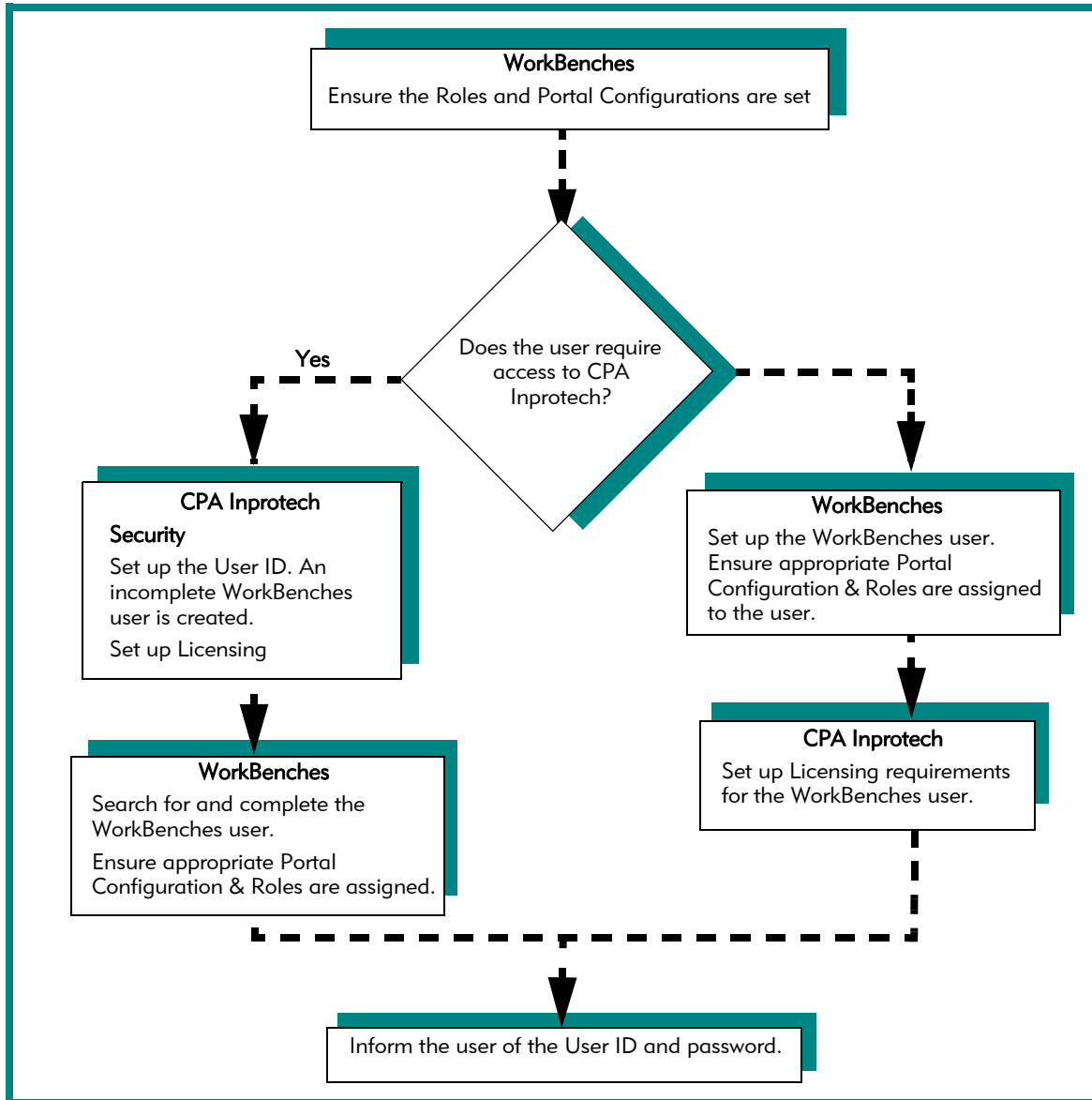
Web parts can be inserted in different areas of a tab. You can specify whether a web part is expanded or collapsed when the tab is first displayed. You can also select the number of rows to be displayed if the web part contains paging.

- 7 Click [Save].




## Internal WorkBench Users

### Overview



## Setting up a User with Access to CPA Inprotech & WorkBenches

We recommend that users who require access to both are first set up in CPA Inprotech and then in WorkBenches. When a Login ID is set up for staff members in **Security**, an incomplete WorkBench user is automatically created. These users must be updated by the Administrator before they can be used to access WorkBenches.

-  Users accessing WorkBenches from outside the firm's intranet, for example when travelling, must have the WorkBenches URL set up as a Trusted Site.



### TIP

Existing CPA Inprotech users are automatically set up as incomplete WorkBench users when the WorkBench is first installed.

### To set up a user with CPA Inprotech and WorkBench access

- 1 Ensure the user's name details are set up via **Names** in CPA Inprotech.
- 2 Set up the user's Login ID in **Security** in CPA Inprotech.
- 3 If you have purchased a Named Users Licence, ensure the licensing requirements are set up via **Security** for each Module that the user needs to access.
  - In **Security**, select Tools > Licensing.
  - Select the Client/Server Users option.
  - Scroll across to the WorkBench Modules and double click in the required columns to apply the licence.
  - Click [Save].
- 4 Set up the user in WorkBenches as follows:
  - Login to WorkBenches as the Administrator.
  - Click the user tab.
  - Ensure that the Incomplete check box is ticked and then click [Run Search] to display the list of incomplete users in the **User Search** window.
- 5 In WorkBenches for each incomplete user:
  - Click the user Login ID link to display the **User Maintenance** window.
  - Complete all fields as required. Mandatory fields are highlighted in blue.
  - Set the password by clicking the Change Password link. (Passwords are case sensitive.)
  - Click [Save].
- 6 Advise the user of the Login ID and Password.

A portal configuration must be attached to each WorkBench user. If the Role/s assigned to the user contain mandatory web parts they must appear in the Portal Configuration.

## Setting up a User with Access to WorkBenches Only

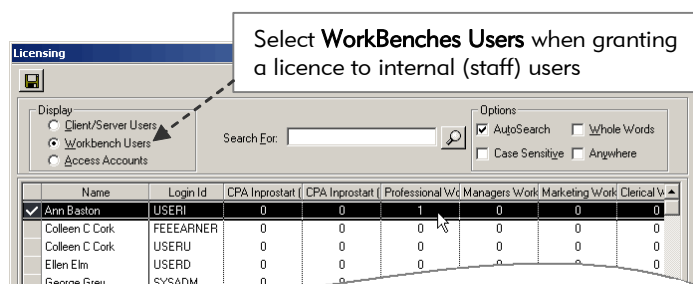
### To set up a WorkBench user

- 1 Ensure the user's name details are set up via **Names** in CPA Inprotech.
- 2 Set up the user in WorkBenches as follows:
  - Log in to WorkBenches as Administrator.
  - Click the Users tab.
  - Click [New] on the **User Search** window to open the **Create User** pop-up.
  - Ensure your **Internal Access Account** is selected in the **Access Account** field.
  - Complete all mandatory fields (highlighted in blue) and other remaining fields as required.  
Set the password. (Passwords are case sensitive.)  
Select a role and a Portal Configuration.
  - Click [Save].
- 3 If you have purchased a Named Users Licence, ensure the licensing requirements are set up via **Security** in CPA Inprotech, by doing the following:
  - In **Security**, select **Tools > Licensing**.  
The **Licensing** window is displayed.
  - Select the **WorkBench Users** option.
  - To apply the licence, double click in the required **Module** column for the staff user.
  - Click [Save].
- 4 Advise the user of their Login ID and Password.



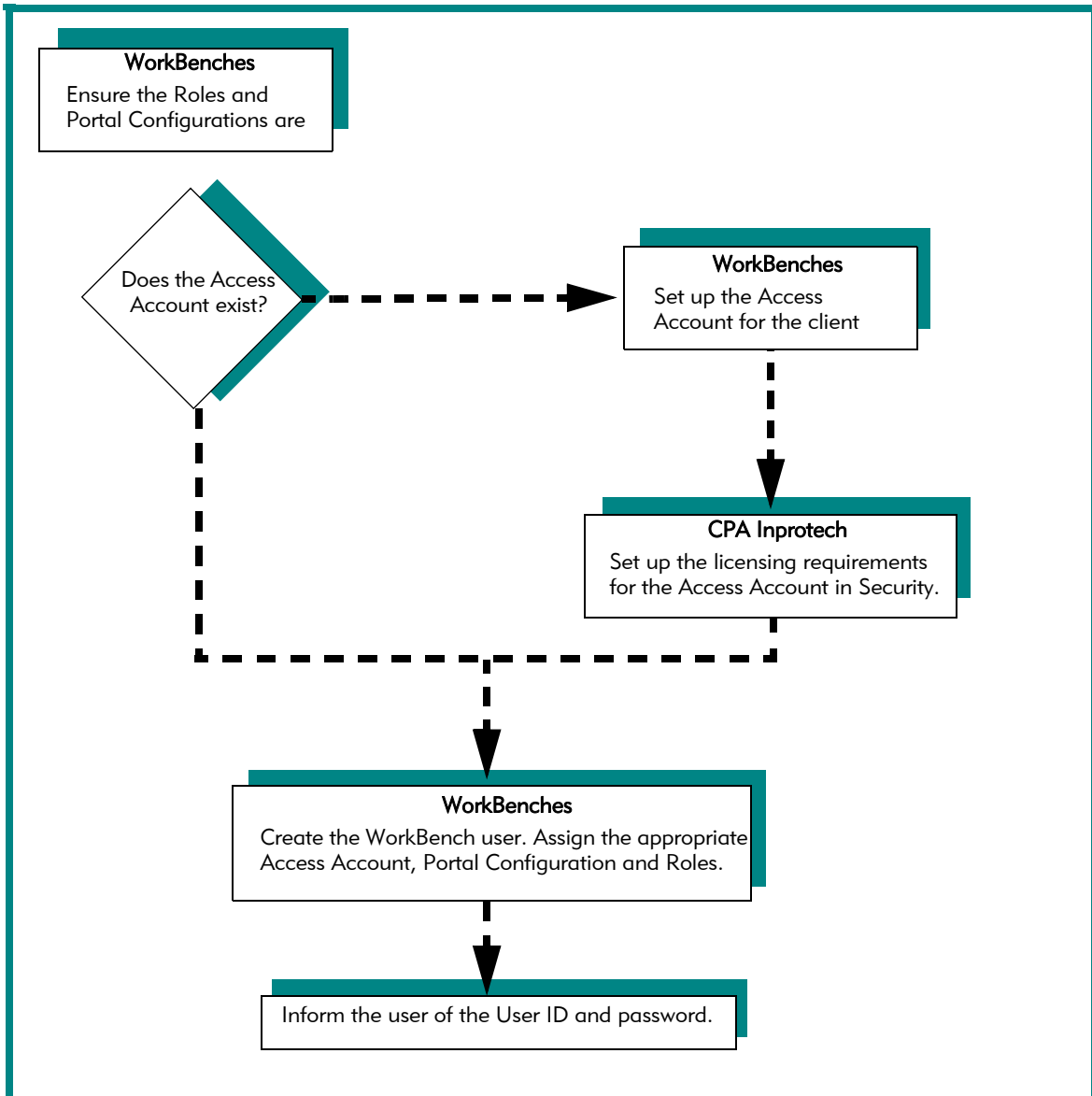
If the Role/s assigned to the user contains mandatory web parts they must appear in the Portal Configuration.

Once a user is saved as an staff user they cannot be changed to a client user. The record must be deleted and recreated.



## External WorkBench Users

### Overview



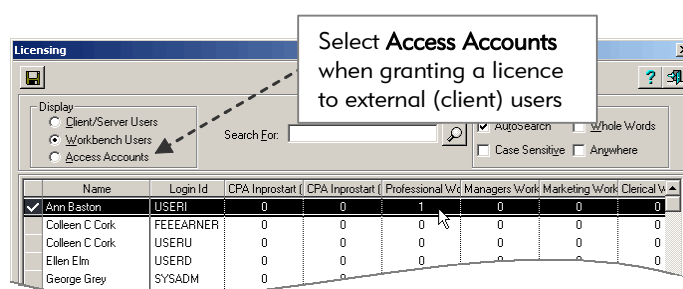
## Setting up Access Accounts

An Access Account must be set up for each client organisation that requires access to the Client WorkBench. This account is based on the client's company name which must exist in CPA Inprotech.

### To set up an External Access Account

- 1 Set up the Access Account in WorkBenches as follows:
  - Login to the WorkBench as Administrator and click **Access Accounts** in the Sidebar.

- Complete the fields as required on the **Create Access Account** pop-up
  - Enter a unique and meaningful *Account Name*.
  - Ensure that the *Internal* checkbox is unchecked. This checkbox should only be selected for your firm's Access Account.
  - In the *Names being Accessed* section, click [Add] and assign the company names associated with the client organisation to the Access Account.
  - Click [Save].
- 2 If you have purchased a Named Users Licence, ensure the licensing requirements are set up via **Security** in CPA Inprotech.
    - In **Security**, select **Tools > Licensing**.  
The **Licensing** window is displayed.
    - Select the **Access Accounts** option.
    - To apply the licence to a Module, double click in the Module column for the external Access Account.
    - Click [Save].





## Setting up External Administrator Users for an Access Account

Each external Access Account can have their own external Administrator users. These users would then be responsible for creating and maintaining the external users for the Access Account.

### To set up an External Administrator user

- 1 Ensure the user has an Access Account.
- 2 If you have integrated Active Directory with WorkBenches a [Browse] button is available. It allows you to view and select from a list of Domain Account Names.

- 3 Set up the appropriate Roles and Portal Configurations for the External Administrator.

Either set up the External Administrator's name details in **Names** (CPA Inprotech)

OR

Create the External Administrator's name.

- 4 Set up the External Administrator in WorkBenches as follows:

- Login to WorkBenches as Administrator.
- Click the Users tab and then click [New] on the **User Search** window.
- Enter the user's access account and the click Create Name for the new user.
- Complete the remaining fields as required, selecting the appropriate Portal Configuration and Role.
- Click [Save].

- 5 Advise the External Administrator of their Login ID and Password and inform the External Administrator that any users at their site wanting to access WorkBenches must include the WorkBenches URL as a Trusted Site.

#### Notes

- Mandatory fields are highlighted in blue and must be completed.
- If the External Administrator's Name does not exist, click [Create Name] to add basic name details to your database.  
(These details are only basic, so if you want to enter the complete details for a name you must access **Names** (CPA Inprotech).
- A password can be set by using the Change Password link.
- If the Role/s assigned to the user contains mandatory web parts they must appear in the Portal Configuration.
- Once a client user has been created, it cannot be changed to a staff user. It must be deleted and

## Setting up an External User

### To set up an external WorkBench user

- 1 Ensure the user's Access Account exists.
- 2 Either set up the user's name details in **Names** (CPA Inprotech) or create the user's name in WorkBenches by performing the following steps:
  - Login to WorkBenches as Administrator.
  - Click the Users tab and then click [New] on the User Search window.
  - Enter the user's Access Account and then click Create Name for the new user.
  - Complete the remaining fields as required, selecting the appropriate Portal Configuration and Role.
  - Click [Save].
- 3 Advise the user of their Login ID and Password and inform the user that the WorkBenches URL must be included as a Trusted Site.

#### Notes

- Client users must have the WorkBenches URL set up as a Trusted Site.
- Refer to Adding WorkBenches URL to Internet Explorer's Trusted Sites List in the *CPA Inprotech Workbench Modules Installation Guide* for more information.
- All mandatory fields are highlighted in blue and must be completed.
- If the user's name does not exist, click [Create Name] to add basic name details to your database.
- These details are only basic, if you want to enter the complete details for a name you must access **Names** (CPA Inprotech).
- Set the Password by using the Change Password link.
- If the Role/s assigned to the user contains mandatory web parts these must be listed in the Portal Configuration.
- Once a user is saved as a client user it cannot be changed to a staff user. The record must be deleted and recreated.

## Setting Maximum Logon Attempts for Users

The following instruction allows both internal and external user accounts to be set up so that:

- the account will lock after a certain number of attempts to log into a WorkBench Module, and
- an e-mail notification can be sent to the appropriate user Administrator to say so.

### To set up the Maximum Number of Logons for a User Account before Lockout

- 1 Access **Control** via the CPA Inprotech Launchpad.

- 2 Select the Max Invalid Logins site control.
- 3 In the *Integer* field set the value to a number greater than **0**, so that the user will be locked out if the number of unsuccessful logins reaches that number.

## SMTP Mail Server Requirements


If users want to be able to send an e-mail to an External/Internal Administrator, their account needs to be set up so that their SMTP/Mail Server allows e-mails to be sent *without* authentication.

## Unlocking a Locked User Account

Should a user be locked out, both internal and external user Administrators can ‘unlock’ the account. With the Update permission to the *Maintain User* task, the user account can be unlocked by accessing the particular user account via the **User Maintenance** window and clearing the *Locked* checkbox.

## Deleting WorkBench Users

WorkBench users can be deleted from the **Edit User** window by clicking [Delete].

-  When deleting a WorkBench user who also has access to CPA Inprotech, the CPA Inprotech User ID must be deleted in **Security** before deleting the WorkBench user.

# Common WorkBench Functionality

## Messages, Logos & Images

### Welcome Message Types

The Welcome Message is a message that can be displayed to all staff and client WorkBench users. It can be used to provide general information about the system, such as new features, scheduled down time and so on.

The message type identifies users who can view the message. There are three message types:

- **Global** – this is the default type and can be viewed by all WorkBench users.
- **Internal** – this message type overrides the Global message and can be viewed by all internal WorkBench users (i.e. your staff members).
- **External** – this message type overrides the Global message and can be viewed by all external WorkBench users (i.e. your clients).



### Setting up Welcome Messages

Setting up these messages involves 3 stages:

- Setting up the Text Type for each Message Type.
- Setting the necessary site controls for each Message Type.
- Entering the text of the message for each Message Type.

### To set up the Text Types for each Message Type

- 1 Access **Names** via the CPA Inprotech Launchpad. The **Name Selection** window is displayed.
- 2 Press F2 in the *Text Type* field to display the **Text Type Pick List**.
- 3 Set up the Text Types for each of the following sample Welcome Messages by completing fields as follows and clicking [Add] for each type.

FOR EXAMPLE:

|                   |   |
|-------------------|---|
| Global Message:   | Text Type = GW<br>Description = Global Welcome<br>Individual and Organisation checkboxes selected   |
| Internal Welcome: | Text Type = IW<br>Description = Internal Welcome<br>Staff and Organisation checkboxes selected      |
| External Welcome: | Text Type = XW<br>Description = External Welcome<br>Individual and Organisation checkboxes selected |

- 4 Once all text types have been added, click [Cancel] to return to the **Name Selection** window.

### To set the values for the necessary site controls

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Ensure the following site controls are set up with the correct Text Type values.

FOR EXAMPLE:

Using the Text Types in the above example, set up character values as follows:

- Welcome Message – Global, value = GW
- Welcome Message – Internal, value = IW
- Welcome Message – External, value = XW.

### To set up the text for each of the Welcome Message types

- 1 Access **Names** via the CPA Inprotech Launchpad.
- 2 Locate the name record for your firm.
- 3 Select the **Text** tab.
- 4 Set up required message types as follows:
  - For **all users** – select Global Welcome from the *Text Type* list.
  - For **staff members** – select Internal Welcome from the *Text Type* list.
  - For **all client users** – select External Welcome from the *Text Type* list.
- 5 For each message enter the appropriate message in the *Text* box.



#### TIP

Your firm refers to the name indicated in the HOMENAMENO site control.

## Setting up Client Messages

Messages can be defined for individual clients. These are displayed in one of the following:

- Client Names web part of the Client WorkBench

| Access Names (4)   |        |  |                  |               |
|--|--------|--|------------------|---------------|
| Brimstone Extraction Industries  | 000105 | 15 Chicago Street, Border town MN , United States of America |                  |               |
| Brimstone Extraction Industries (Australia) Pty Limited                              | 000133 | 12 Turrella Avenue, Renmark SA 5182, Australia               | Mr Nick Old      |               |
| Brimstone Holding Company  | 001234 | SA 5182, Australia   | Dr Gillian James | Ms Ann Baston |
| Congratulations on successful registration of your trademark in the United States. ← |        |  |                  |               |
| Brimstone Magnesium Extraction Company   | 000118 | 40 Firewater Road, Brimstone 20910, United States of America | Mr Gregory Yast  |               |

Client Message

- the Notes tab in Name Details of the client in the internal WorkBench Modules.

Name Details: Brimstone Holding Company (001234)

Refresh |

**Brimstone Holding C...**

Additional Information

Addresses (6)

Associated Names (11)

Correspondence Instructio...

Notes (2)

Other Details

References (2)

Staff Responsible (1)

Standing Instructions (6)

Telecommunications (4)

See Also

Where Used

Attachments

Name: Brimstone Holding Company (001234)

Postal Address: PO Box 10  
Renmark SA 5182  
Australia

Street Address: SA 5182  
Australia

Telephone: +61 8 4345 4567

Fax: +61 8 4345 4555

Electronic Mail: brim@ozemail.com.au

Web Home Page: www.brimstone.com

Main Contact: Dr Gillian James

Remarks: Renmark

Staff Responsible (1) | Addresses (6) | References (2) | Telecommunications (4) | Correspondence Instructions | Other Details | Associated Names (11) | Notes (2)

Standing Instructions (6)

Notes (2)

| Type             | Notes  |
|------------------|--|
| General Notes    | Client of long standing.   |
| External Welcome | Congratulations on successful registration of your trademark in the United States. ← |

Client Message

### To set up a Client Message

- 1 Ensure the External Welcome Text Type is defined.
- 2 Ensure the Welcome Message – External site control is defined.
- 3 Enter the message text:
  - Access **Names** via the CPA Inprotech Launchpad.
  - Locate the name record for the client.
  - Select the **Text** tab.
  - Select the **External Message** type from the *Text Type* list.
  - Enter the message in the *Text* box.
  - Click [Update].
- 4 Repeat these steps for each client who requires a message.

## Setting up Disclaimer Messages (4793)

When submitting a pay instruction or one that is 'Paid Via Other Channels' or when running a budget report, you can set up a tailored confirmation Disclaimer Message to be displayed. You just need to supply the Disclaimer Messages that have been framed by your legal team as HTML files (using our naming convention for use in the requisite windows) and copy them to a folder placed within the root CPAInpro virtual directory. If you want to have different disclaimers for External users, these need to be placed in an extra sub folder.


The Disclaimer Messages can also be implemented in a language other than English.

### To set up a Disclaimer Message

- 1 Create a folder named 'custom' at the root of the CPAInpro virtual directory  
If you want to display different disclaimer messages to your external users, save an alternate set of messages in a folder named 'external' beneath the folder named 'custom'.
- 2 Create the following HTML files, each containing the appropriate disclaimer message (tailored per your firm and your legal team's needs) saving each using the following naming convention:

Disclaimer\_[Task Name] (with all spaces removed)

| HTML File Names   |
|---|
| Custom\Disclaimer_ProvideBulkInstructions.html<br>Custom\External\Disclaimer_ProvideBulkInstructions.html       |
| Custom\Disclaimer_ProvideCaseInstructions.html<br>Custom\External\Disclaimer_ProvideCaseInstructions.html       |
| Custom\Disclaimer_ProvideDueDateInstructions.html<br>Custom\External\Disclaimer_ProvideDueDateInstructions.html |
| Custom\Disclaimer_AdvancedCaseFeeSearch.html<br>Custom\External\Disclaimer_AdvancedCaseFeeSearch.html           |
| Custom\Disclaimer_QuickCaseFeeSearch.html<br>Custom\External\Disclaimer_QuickCaseFeeSearch.html                 |
| Custom\Disclaimer_RunSavedCaseFeeSearch.html<br>Custom\External\Disclaimer_RunSavedCaseFeeSearch.html           |

 Both sets of six files are named according to the window or search window accessed to submit the instruction.

- 3 Assign the appropriate file access permissions to these folders.

## Setting up Disclaimer Messages in other Languages

If you want to implement disclaimer messages in one or more languages other than English, you could use the following script (set up to convert the messages into **French**) as an example of how to do so. You need to also supply the culture for the computer the user is currently logged on to as a query string to the disclaimer html document, e.g:

Custom\External\Disclaimer\_ProvideDueDateInstructions.html?culture=**fr-FR**

### To set up a Disclaimer Message in a foreign language

- 1 Adapt the following example script as necessary:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<html>
<head>
<script language="javascript">
/* the method below extracts the query string 'culture' from the URL */
function getCultureFromQstring() {
    var culture = "";
    //Retrieve Document location and tear off the QueryString values for
    processing.
    var url = document.location + '';
    var q=url.split('?');
    if (q[1]) {
        //Get all Name/Value pairs from the QueryString
        var pairs = q[1].split('&');
        for (i=0;i<pairs.length;i++) {
            //Get the Name from given Name/Value pair
            var keyval = pairs[i].split('=');
            if (keyval[0] == 'culture') {
                //Get Value from given Name/Value pair and set to return Culture
                culture = keyval[1];
            }
        }
        return culture;
    }
}
/* Administrator then implements a case statement like the following to
redirect to a French page, etc, or may show or hide a specific portion
in the page depending on the culture */
function DisplayMessageIn(culture)
{
    switch (culture)
    {
        case "fr-FR": window.navigate("thefrenchpage.html"); break;
    }
}

DisplayMessageIn(getCultureFromQstring());

</script>
</head>
<body>
</body>
</html>
```



- 2 Supply the culture for the computer the user is logged on to as a query string to the disclaimer html document, e.g:  
`Custom\External\Disclaimer_ProvideDueDateInstructions.html?culture=fr-FR`

## Setting up Logos & Graphics

### Setting up your Logo

Your logo can be displayed to all users in the top left corner of WorkBenches.

#### To display your logo

---

- 1 Copy your logo using this naming convention: `custom_company_logo.png`
- 2 Save it to the `Images\Header` directory.

### Setting up other Graphics

Images and Logos relevant to a client can also be displayed as part of the name information in Client WorkBench. For example, a client's logo can be displayed (i.e. to client users in the Client WorkBench) in the top right of the Name Details web part.

Also images relating to an individual name (for example, a staff photo) can be displayed in the top right of the **Name Summary** web part.

#### To display an image

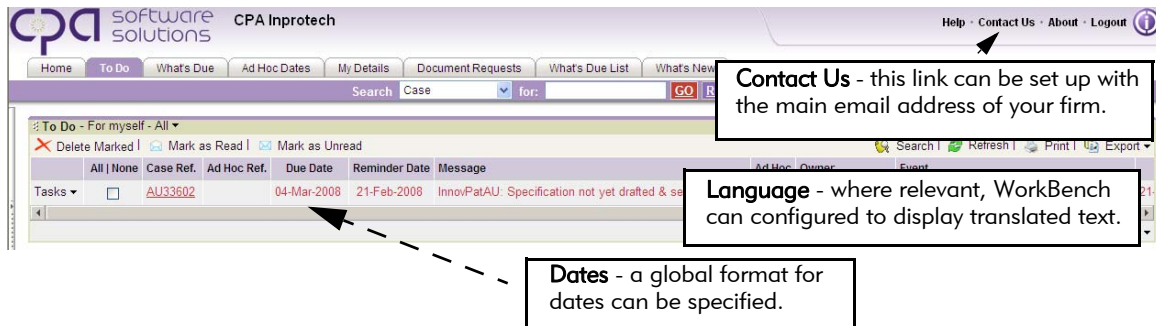
---

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Ensure the Name Image site control is set to True.
- 3 Access **Names** via the CPA Inprotech Launchpad.
- 4 Locate the Organisation or Individual record for the name associated with the image.
- 5 Select the **Name Image** tab.
- 6 Ensure that the image required is listed in the list of graphics.

## Presentation

With regard to configuring information in WorkBenches you can set the following:

- The default e-mail address for the Contact Us link
- The Date Format for various countries
- Language/Translated Text.



## Setting up the 'Contact Us' link

The default e-mail address for the Contact Us link is set up in the configuration file.

### To set up a default e-mail address

- 1 Open the `web.config` file using a text editing program.
- 2 In the `<appSettings>` section, look for the `ContactUsEmailAddress` attribute.
- 3 Set the value for this attribute to the appropriate e-mail address.  
FOR EXAMPLE:  

```
<!-- the default recipient's email address for the Contact Us link -->
<add key="ContactUsEmailAddress" value="enquiry@yourorg.com"/>
```
- 4 Save the `web.config` file.

## Setting the Date Format

Dates are presented in different formats for different countries, therefore it is important to ensure that the presentation of dates is unambiguous. WorkBenches use the Date Style site control in CPA Inprotech to determine the format of dates.

### To set the date format

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Select the Date Style site control.
- 3 Enter the number for one of the following available Date Styles:
  - 0 – use the regional or browser culture date format.
  - 1 – use the date style dd-MMM-yyy, e.g. 01-Mar-2001.
  - 2 – use the date style MMM-dd-yyyy, e.g. Mar-01-2001.

3 – use the date style yyyy-MMM-dd, e.g. 2001-Mar-01.

If you enter 0, the date is formatted according to the user's local preferred language/culture setting; defined in:

- WorkBenches – via the Language area of the user's Personal Preferences. (Select the **User Maintenance** window for the user and click the Change Preferences link.) OR,
  - The current browser settings – via the **Language Preference** window (accessed via Languages on the **General** tab of the **Internet Options** window).
- ❗ The preferred culture obtains the date format from the Regional Short Date setting defined for the culture in the Regional and Language Options of **Control Panel**.

## Setting the Language for Translated Text

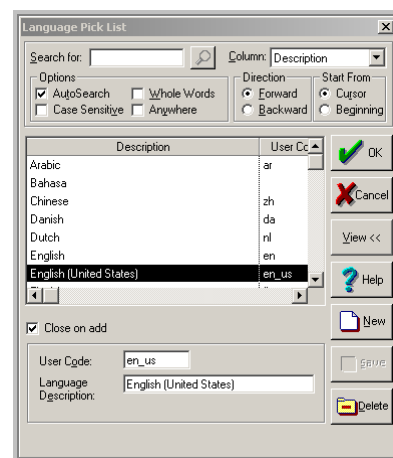
Some data can be held in CPA Inprotech in multiple languages, for example, goods and services text. Where relevant, WorkBenches can be configured to present this information in the language indicated by the user's preferred culture. For example, the goods and services text can be displayed in a client's preferred language.

The user's preferred culture is defined in:

- WorkBenches – via the Language area of the user's Personal Preferences. To access the User Preference Maintenance, select the **User Maintenance** window for the appropriate user and click the Change Preferences link OR,
- The current browser settings–via the **Language Preference** window (accessed by selecting Languages from the **General** tab of the **Internet Options** window).

## To configure the language setting mapping between CPA Inprotech and browser

- 1 Retrieve the appropriate Language – Culture settings from your browser.  
For Internet Explorer:
  - Access the **Language Preference** window by selecting Languages from the **General** tab of the **Internet Options** window.
  - Click [Add] to view a list of the available Language – Cultures.
  - Record the languages and cultures to be added to the **Language Pick List** in CPA Inprotech.
- 2 Access **Names** via the CPA Inprotech Launchpad and select the **Name Language** tab. This tab is available when viewing details for an organisation or an individual who is *not* a staff member.
- 3 Press F2 in the *Languages* field to display the **Language Pick List**.
- 4 Enter the [language – culture] information for each language you are using.



## Automatic Time-Out

WorkBenches can be configured to automatically sign out of a user's session if it is idle for a period of time greater than the session timeout period set in the Web.Config file. Once the session timeout period is reached a warning message is displayed. If the user does not respond to the message the user will automatically be signed out of the WorkBench session.

This time out functionality can be switched on separately for staff and client users through the *Time out internal users* and *Time out external users* site controls. This functionality is only applicable to WorkBench users set up with Forms Authentication. For information on Forms Authentication refer to the Modifying End User Authentication Modes for CPA Inprotech WorkBench Modules guide (WB\_Modifying\_AuthenModes.pdf) located in the Documentation\Publications folder of your install directory.

### To set up Automatic Time-Out

- 1 Access **Site Control** via the CPA Inprotech Launchpad. Set the following site controls:
  - *Time out internal users* to True to enable the automatic time-out functionality for all Internal users.
  - *Time out external users* to True to enable the automatic time-out functionality for all external users.
- 2 Open the `web.config` file using a text editing program.
- 3 Set required values for the following:
  - Session Timeout: in the `sessionState` node
 

```
<sessionState mode="InProc"
stateConnectionString="tcpip=127.0.0.1:42424"
sqlConnectionString="data source=127.0.0.1;Trusted_Connection=yes"
cookieless="false" timeout="120" />
```

The recommended session timeout value is **120** minutes.
  - Cookie Timeout: in the `authentication` node
 

```
<authentication mode="Forms">

<forms name=".CPASSWorkBenches" protection="All" timeout="120"
loginUrl="~/Desktop/Modules/Security/SignIn.aspx" />

</authentication>
```

❗ The Cookie timeout must be equal or greater than the Session Timeout.
- 4 Save the `web.config` file.

## Search Facility

### Setting up Public Searches

When saving a Search Definition, you can specify the search criteria, the presentation of Search Results and whether the definition is classified as public or personal. Search definitions classified as personal can only be recalled by the user who set it up. Public search definitions are available to users who belong to the same Access Account as the user who set up the search definition.

For example, a public search definition set up by a staff user will only be available to staff users. While a public search definition set up by an external user belonging to an Access Account will only be available to the external users assigned to that particular Access Account.

#### To create a Public Search

---

- 1 Login to WorkBenches as an appropriate user, i.e. as:
  - A staff user with access to the appropriate maintain search task.  
For example, the Maintain Reminder Search task.
  - An external user belonging to the required Access Account with access to the Maintain Case Search task.
- 2 Access the required **Advanced Search** window.
  - ① Advanced Search windows are accessed from the Navigation Bar or by clicking [Search] on the appropriate web part.
- 3 Enter the *Search Name* and *Search Description* as required.
- 4 Select the *Public* checkbox.
- 5 Complete remaining fields on the **Criteria** tab.
- 6 If required, complete the **Display/Sort Columns** tab and, where applicable, the **Layout** tab.
- 7 Click [Save].

## Setting up Default Public Searches

When a WorkBench Module is accessed, certain web parts are populated with the results of a default search. For example, when WorkBenches is first implemented, the default search for the My Case List is the Recent Case search. This search can be replaced by a default search that is defined:

- at a firm-level by marking a public search as the default search OR
  - at an individual-level when a user saves a search and selects the My Default Search option.
- ① An individual-level search overrides the public default level search.

WorkBenches Help includes the instructions for setting up a default search by an individual user.

Public Searches can be set up by staff users for use by all client users.

### To set up a Default Public Search

- 1 Login to WorkBenches as one of the following:
  - a staff user with access to the appropriate maintain search task.  
For example, the Maintain Reminder Search task.
  - an external user belonging to the required Access Account with access to the Maintain Case Search task.
- 2 Access the required **Advanced Search** window.
- 3 Either retrieve an existing public search by selecting it in the *Saved Search* field or create a new public search as described above.
- 4 Ensure the *Public* checkbox is selected.
- 5 Select the *Default Public Search* checkbox.
- 6 Click [Save].



#### TIP

If the *Default Public Search* checkbox is not displayed, select the *Public* checkbox and click [Save].

The *Default Public Search* checkbox is displayed once the search is saved as

## Reporting

Workbenches let you to produce reports in a variety of formats including:

- Excel
- PDF
- XML
- Web Archive.

**i** For larger amounts of data Web Archive is the recommended format because Excel, PDF and XML can have limitations. For example an Excel spreadsheet is only capable of holding 65,535 rows. These limitations may cause Exception Errors when producing reports which contain large amounts of data.

If you want to use Excel, PDF or XML when reporting on large amounts of data these Exception Errors can be managed by specifying the maximum number of rows to be included in a report. Any report that exceeds this number will cause the following to occur:

- If you've run the search already and you're trying to export the results, you will get an error and you will need to adjust your search criteria before producing the report.
- If you're searching and exporting in one go (i.e. selecting from a *Run Search* field), you will get a warning and your results will be truncated if you continue.

### To set a limit on the number of rows to be included in a report

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 In the Export Limit site control enter the maximum number of rows you want a report to contain. For example: set the value to 60,000 if your Report format is Excel.

Setting this site control to **0** means you want an unlimited number of rows to be included in the report. In this situation Exception Errors may occur when producing large reports.

## Case Information

### Setting up Case Searches

The case search can be configured to search any Open Action and not just the Renewal Action when using the Next Renewal Date as part of the search criteria.

#### To search on any open action

Set the Renewal Search on Any Action site control to True.

### Setting up Case Links

WorkBenches can be configured to display a list of links that are relevant to the case currently being displayed in the *Case Details* web part. These links allow the user to access documents or files that are located on the local PC or Server or to web pages relevant to the case. The case links displayed can be arranged into groups, providing the user with quick and easy access.



#### TIP

Only links that are classified as 'Public' will be visible to an external (client) user.

For example, links can be set up to web pages that supply information for:

- **Specific types of cases**, for example, some sites are for patents only or for trademarks only, the US PTO site only applies for US cases.
- **Cases with a specific status**, for example, information on pending cases may be provided in one area of a web site while another area provides information on registered cases.
- **Specific cases**, for example, the USPTO site requires the registration number of the case to access certain information.

The screenshot displays the 'Case Details' web part. On the left is a navigation pane with various tabs like 'Additional Information', 'Billing Instructions', 'Classes', etc. The main area shows case details for 'Benje Australia Pty Ltd (MX5687)'. Below this is a tabbed interface with 'Names (6)' selected, showing a list of names and their roles. A dashed arrow points to the 'Links' section in the navigation pane, which is labeled 'Case-related links'.

| Type                | Name                             | Name Variant | Attention     | Reference |
|---------------------|----------------------------------|--------------|---------------|-----------|
| Instructor          | Benje Australia Pty Ltd (MX5687) |              | Louisa Louise |           |
| Owner               | Benje Australia Pty Ltd (MX5687) |              | Louisa Louise |           |
| Staff member        | Hardy, Cliff                     |              |               |           |
| Debtor              | Benje Australia Pty Ltd (MX5687) |              | Louisa Louise |           |
| Renewals Debtor     | Benje Australia Pty Ltd (MX5687) |              | Louisa Louise |           |
| Renewals Instructor | Benje Australia Pty Ltd (MX5687) |              | Louisa Louise |           |



## Rules for Case Web Links

Case links are defined as Rules in **Control** in CPA Inprotech. Each rule consists of:

- Link information including title, description and the URL address.
- Filter criteria such as Office, Case Type, Country, Property Type, Status Summary which is used to identify the cases that apply to a link.

### Things to remember:

Outlined below are things to remember when setting up the Rules for Case Links:

- The URL Address can be:
  - **entered directly:** as a simple link that accesses the same location for all cases retrieved using the filter criteria, OR
  - **built using a DocItem:** using case information retrieved from the database for the current case.

It is particularly useful if you want to view details for a specific case on an IP Office web site. For example, a DocItem can be used to build the following URL address:

[http://patents1.ic.gc.ca/details?patent\\_number=2172863&language=EN](http://patents1.ic.gc.ca/details?patent_number=2172863&language=EN).

- Only Doc Items that accept the IRN of a case as the single entry point, and return a single string value, i.e. the link address, can be used.  
Doc Items are maintained through Item Maintenance in CPA Inprotech. For more information, refer to the CPA Inprotech Help.
- Links can be displayed in groups on the *Links* topic. These groups are maintained via the **Web Links Group Pick List**.
- The *Public* checkbox identifies WorkBench users who have access to a link. If it is:
  - Selected – the link is available to both internal and external WorkBench users.
  - Cleared – the link is only available to internal WorkBench users.
- The *Group* field lets you group case links together. A group displays in WorkBenches when one or more links from the group are retrieved for the current case.

### To define and maintain Rules for Case Web Links

- 1 Access **Control** via the CPA Inprotech Launchpad.
- 2 Select **Case Web Links** in the *Controlling* field, then click [Refresh] to display all current case links.
- 3 To add a Rule:
  - Complete the filter criteria fields as required, i.e. *Office, Case Type, Country, Property Type, Status Summary*.
  - Complete the link fields as required, i.e. *Link Title, Description, Doc Item or URL, Group, Public* checkbox.
  - Click [Add].
- 4 To change a Rule:
  - Select the Rule from the Criteria table.
  - Modify the link fields as required, i.e. *Link Title, Description, Doc Item or URL, Group, Public* checkbox.
  - Click [Update].

## Setting up the My Case List

The **My Case List** web part allows Clerical, Client and Professional WorkBench users to automatically display a list of cases that are important to them. When the WorkBenches are implemented, the Recent Cases search is used to populate this web part. This search can be overridden at:

- **A firm level** for staff users or an Access Account level for client users by setting up a public default search via the **Advanced Case Search** window. When setting up this search you must ensure you are logged on as an appropriate user.
  - If you are creating a public default search for your firm you must log in as an staff user. This search will then apply to all Professional WorkBench users.
  - When creating a default search for an Access Account (i.e. for a client site) you must log in as an external user that is assigned to the client's Access Account. This search will apply to all external users assigned to the Access Account.
- **An individual level** by creating or selecting an existing default case search. Client, Professional WorkBench users can create and maintain individual default case search.

## Setting up a Related Case List

Related cases can be viewed in a list or tree format in the **Case Details** web part. When the list format is accessed the sort order of the cases is determined by the *Related Case Sort Order* site control.

### To view cases in the Related case list in date order

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Select the *Related Case Sort Order* site control.
- 3 Enter **DATE** in the *Character* field.

If this site control is not set, the cases are displayed in the order they were added.

## Setting up Instruction Definitions (2982/4634)

Rules for instructions are no longer defined **Control** in CPA Inprotech as Event Update Profiles. With the requisite permissions (as appropriate under the Instruction Administration, Provide Bulk Instruction and/or Provide Instructions features) they are now managed within WorkBenches as 'Instruction Definitions' via the *Maintain Instruction Definitions* option on the **Tasks** menu.

This task allows both staff and client users to define more complex instructions with unlimited responses for cases so multiple instruction options are available for any particular case and instruction combination. clients and employees of a firm can then submit instructions on-line via the **Provide Instructions** window either in bulk or on per case basis.

- ❗ Renewals, affidavits and annuities are treated as actions within the same case.

External users may set up Instruction Definitions only for cases where the access name is acting in an instructing capacity (by providing an Accept External Instructions From name type). For example, you may allow both the Instructor and Agent to view the Case, but only permit the Instructor to provide instructions.

Any existing Event Update Profiles being used by WorkBenches will be converted to the new rule structure but these need to be checked and refined.

This section covers:

- Refining Instruction Definitions converted from previously used Event Update Profiles
- Creating new Instruction Definitions in WorkBenches.


You will need to refer to the instruction called 'Granting an ASPNET Process Identity to the database (5191)' in the 'Post Installation Tasks' section of the 'CPA Inprotech WorkBench Modules Installation Guide' for details on how to optimise the performance of processing times for issuing on-line instructions.

## Refining Instruction Definitions converted via Event Update Profiles

Firms previously using Due Date Instructions defined as Event Update Profiles need to review the Instruction Definitions that were automatically created. You need to check whether the instruction definition is correct, and then you may want to create more sophisticated instructions using the new Instruction Definition functionality in WorkBenches.


### Recommendations

When checking your converted case Instructions, we recommend the following:

- 1 Use Prerequisite Events where possible.
  -  This is essential if any of the instruction options do not finalise the instruction.  
For example, 'Hold' as an intermediate response used when a firm is awaiting further instructions such as 'Unhold', 'Abandon', etc.
- 2 Provide the Accept External Instructions From name type if the instruction is to be submitted by external users.  
Instructions provided by external users should trigger events explicitly identified as originating from a client. This allows specific workflow rules to be created to manage client instructions; for example, to trigger subsequent events based on workflow rules, to allow additional confirmation or processing of the instruction, to trigger some internal action if conflicting or inappropriate instructions are received.
- 3 Assign an appropriate Client Importance Level to client-specific events (via the client/server Event Pick List) to make them available in Client WorkBench, and allow external users to view the instructions they provided.
- 4 Ensure the fee calculated will only be visible to users granted access to this information via Security (Subject: 'Fees and Charges Calculations').
- 5 Adjust the Events & Entries workflow in **Control** in CPA Inprotech:
  - to respond appropriately to the trigger Events
  - to ensure that any Prerequisite Event is cleared/populated appropriately.


## Creating Instruction Definitions

### To set up an Instruction Definition

- 1 Provide either a Prerequisite Event or an Instruction Due Event, or both.
  - If you select a Prerequisite Event and the Event exists against the case, then any Instruction Due Event will be used for information purposes.
  - If you do not provide a Prerequisite Event - then the Instruction Due Event is due and none of the trigger Events for the instruction exist against the case.
  -  This provides the replacement for the existing Event Update Profile rule.
  - If you select the `Accept Instruction Against Due Event` option - it identifies that an instruction can be provided against a due date.

|                      |             |                                 |        |          |  |
|----------------------|-------------|---------------------------------|--------|----------|--|
| Tasks                | 03-Aug-2002 | Renewal Reminder No. 2          | PQ0234 | 702031   | A method of drying fowl manure         |
| Provide Instructions | 002         | Application convention deadline | PR8484 | 010828-1 | Extraction of Iron from low grade ores |
|                      | 19-Sep-2002 | Automatically renew             | PQ0234 | 702031   | A method of drying fowl manure         |

The Instruction Due Event determines:

- which Due Date the instruction will be available against
  - the Due Date to display on the bulk instruction window.
- 2 Use further options as follows:
    - Select `Determine Cycle from Action` if any of the events on the rule are cyclic to use the corresponding cycle - otherwise, Cycle 1 will be used.
    - If you are an end user, enter Instruction Explanation/Option Explanation.
    - Enter a Calculate Fee Using value to produce a corresponding fee visible to the user when providing the instruction.
    - In the `Accept External Instructions From` field, select a Name Type to determine which external users can provide this instruction for a particular case.
      - For external users, one of the Access Names for the account must act as the supplied name type for the case.
      - For staff users, no restriction is applied.
    - Select the `Hide if Event Occurred` option to override the `Available if Event Occurred` option.
  - 3 Instructions need to be marked for one of the following:
    - *Accept Instruction For Multiple Cases*
    - *Accept Instruction For Single a Case, or*
    - *Accept Instruction Against Due Event.*
  - 4 Click [Save].
    -  By default, external users cannot view Event Text, but you can grant a client access to this information by setting the `Client Event Text` site control to True.

## Configuring USPTO Case Comparison functionality

### USPTO.Private Configuration File

The USPTO Private PAIR functionality is installed with WorkBenches, but is not useable until it has been configured. The

`CPASS.Integration.DataExtract.USPTO.Private.Collector.config` file contains all necessary parameters the USPTO Private PAIR data extract Module needs to access the external source. However, the following parameters need to be set up for EVERY FIRM that needs to compare cases from the USPTO Private PAIR site:

- Profile Path - the physical location of the Digital Certificate acquired from USPTO.
- Profile Password - the password supplied with the Digital Certificate from USPTO.

### To activate the Case Comparison functionality for USPTO Private PAIR

- 1 Obtain a **Digital PKI Certificate** from the USPTO.  
Access the following URL for information on how to obtain this Public Key Infrastructure (PKI) certificate:  
<http://www.uspto.gov/ebc/portal/infocustomernumber.htm>
- 2 Ensure there is a Windows user account on the PC with the following:
  - Interactive privileges on the PC
  - Act as part of operating system enabled.

Check if the Anonymous User account set up for the WorkBenches web site has the above privileges, otherwise assign them to the user. Else, create a new Windows user account for this purpose.
- 3 Logon to the PC with the above user account, and then logon to the USPTO Private PAIR site.  
The `CPASS.BASS.exe` needs a Windows log on user, i.e. it cannot run as the Local Service account. This user needs to meet the requirements of USPTO access, i.e. the account must have been used to log in to USPTO Private PAIR, so that the *Entrust* java application is downloaded to the computer, and becomes available to the Data Collector.
- 4 Ensure the `CPASS.Integration.DataExtract.USPTO.Private.Collector.config` file exists in the WorkBench's application *bin* (virtual) directory.
- 5 Enter the necessary information within the configuration file as follows:
  - Locate the `ProfileFilePath` tag and enter the physical location of the Digital Certificate (.EPF) file that was obtained from the USPTO.  
FOR EXAMPLE:  

```
<PrivatePair>
<ProfileFilePath>C:/Temp/My Profile.epf<ProfileFilePath>
...
</PrivatePair>
```
  - Locate the `ProfilePassword` tag and enter the password issued with the Digital Certificate.  
FOR EXAMPLE:  

```
<PrivatePair>
<ProfilePassword>Password3333</ProfilePassword>
...
```

```
</PrivatePair>
```

- 6 Enable the `CPASS.BASS.exe` Windows Service and set the Service Logon to the user in Step 2.
- 7 Via **Site Control** set the *USPTO Private PAIR Enabled* site control to True.  
This indicates the firm's WorkBenches installation has been set up to access the USPTO Private PAIR site.  
However if your system is not properly configured to access the USPTO Private PAIR site, an error message displays in the **Case Comparison** screen when you click on the corresponding Data Comparison link.
- 8 Grant the necessary permissions to the following Security tasks for the appropriate internal role to allow users to access the functionality:
  - View Case Data Comparison: (Execute permission)
  - Save Imported Case Data:(Update permission).

## Data Mapping

Mapping rules and configuration requirements for US PTO Private PAIR are the same as those used for accessing the USPTO Public PAIR site. Any E-filing configuration already set up for Public PAIR will also be used for Private PAIR.

## Mapping to the EPO's Search Facility URL

### To check you are correctly mapped to the EPO's Search Facility URL

- 1 Access **Doc Items** via the CPA Inprotech Launchpad.
- 2 Review all IPRULES Doc Items related to mapping to the EPO, in particular to the following Doc Item: LINK\_IPO\_EPO\_WORLDWIDE.  
This item is used to generate the EPO URL, and should be in either of these formats:
  - `http://register1.epoline.org/espacenet/regviewer?AP=[applicationnumber]&CY=EP&LG=en&DB=REG`  
or
  - `http://register1.epoline.org/espacenet/regviewer?PN=[publicationnumber]&CY=EP&LG=en&DB=REG`
- 3 If necessary amend the Doc Item as required.

## Setting up Permissions to do Fees & Charges Calculations

Security, as detailed below, is required to be set up for appropriate users who want to be able to calculate Fees and Charges for a case via the:

- *Calculate Case Fees* Task on the **Case Details** window
- **Fees and Charges** window.

### To set up the permissions to calculate the Fees and Charges for a case

---

- 1 Ensure that appropriate external and internal roles are granted access to:
  - The Calculate Case Fees Task
  - The Fees and Charges Calculations Subject
  - The Fees and Charges Estimates Subject (if estimates are required)
  - The Fees and Charges Elements Subject (if access is required for Professional WorkBench users only to sensitive elements of the calculation).

If a break down of Fees & Charge calculations is required, also grant access to:

  - Fees and Charges by WIP Category Subject
  - Fees and Charges by Rate Calculation Subject
- 2 Set up the Renewal Fee site control to default the required Charge Type, and ensure that the following related site controls are set up appropriately:
  - Main Renewal Action
  - Lapse Event
  - TAXREQUIRED.
- 3 Configure Fees and Charges calculations via the **Fees and Charges** window in **Control** in CPA Inprotech.
- 4 Ensure that the Charge Types made available for external use are marked 'Public' via the client/server Charge Type Pick List.

## Attachments

Files and documents that have been linked to a case or a name through CPA Inprotech can be viewed in WorkBenches, as follows:

- Case attachments can be made available to Professional and Client WorkBench users
- Name attachments are available to Professional and Marketing WorkBench users.

### Allowing Users to Access Attachments

The setup required to use this functionality depends on your network configuration. If you have a firewall installed between your internal network (file server) and your web server, you need to install and configure the CPASS CPA Inpro WorkBench Services software before your clients can access the attachments.



For information on installing the WorkBench Services software see the [“CPA Inprotech WorkBenches Installation Guide”](#).

The configuration of this software is outlined in the [“Configuring Services for CPA Inprotech WorkBench Modules”](#) document.

#### To display attachments

- 1 Access Cases via the CPA Inprotech Launchpad.
- 2 Locate the case required.
- 3 Select the **Attachments** tab.
- 4 Ensure the attachments are linked to the case.  
For attachments to be available to external WorkBench users, the *Public* checkbox must be selected.
- 5 If WorkBenches has been configured to provide access to attachments, via **Site Control** set the WorkBench Attachments site control to True.  
AND  
If your web server is outside a firewall, ensure the CPASS CPA Inpro WorkBench Services software is installed and configured.



## Setting up Quick Links

Quick Links let you store the links that are used most often by an organisation. These links can point to local or internet elements such as documents, files, web pages and news groups. They can be tailored for:

- Individual access accounts (i.e. your firm or a client's organisation) – these links are only displayed to members of the specific account. They replace any links set up for internal / external WorkBench users.
- All internal WorkBench users (i.e. staff members) – these links are displayed to all internal users when there are no links defined for the internal Access Account.
- All external WorkBench users (i.e. client users) – these links are displayed to all external users when there are no links defined for the user's Access Account.

### To add a new link:

- 1 Click [Quick Links] under Maintain on the SideBar.
- 2 From the Edit menu, select the:
  - **Access Account Settings** to set up the links for an organisation. Ensure the account name is selected in the *Access Account* field.
  - **Internal User Default** to set up default links for all internal users.
  - **External User Default** to set up default links for all external users.
- 3 Select the required Access Account.
- 4 Click [Add].
- 5 Complete the *Title*, *Description*, *URL* and *Order* fields.  
**Note:** *Order* determines the order of link in the list.
- 6 Click [Save].

### To maintain links

- 1 Click [Quick Links] under Maintain on the SideBar.
- 2 Select the required user type (see step 2 in previous instruction).
- 3 Select the required *Access Account*.
- 4 If you want to:
  - change the order of the links, update the *Order* field for each link.
  - modify a link, select the link to be maintained, change the *Title*, *URL* and *Description* fields as required.
  - delete a link, click bin next to the link to delete.
  - create additional links, click [Add] and complete the *Title*, *Description*, *URL* and *Order* fields.
- 5 Click [Save] when finished.

## Setting up Events

### Critical Dates

The Critical Dates topic on the Case Details web part displays important events. Critical dates can be defined for both internal (staff members) and external (client employees) WorkBench users.

Critical Dates can be defined for both internal (i.e. staff members) and external (i.e. clients, employees) WorkBench users. If the list of critical dates is the same for all users then only one Action Code is required. This code must be specified in the Critical Dates – Internal and Critical Dates – External site controls.

| Critical Dates (7) |             |            |
|--------------------|-------------|------------|
| Event              | Date        | Official h |
| Earliest Priority  | 01-Feb-1995 | 1234       |
| Filing             | 01-Nov-1996 |            |
| Publication        |             |            |
| Registration       |             | 777777     |
| Expiry             |             |            |
| Next Renewal       |             |            |
| Last Event         | 21-Dec-2000 |            |

### Setting up Critical Dates

This involves three stages:

- 1 In the *Events & Entries* controlling option, setting up Action Codes for Critical Dates via the **Action Code Pick List**.
- 2 Setting the relevant 'Critical Dates' site controls.
- 3 Returning to the *Events & Entries* controlling option to set up Critical Dates in the relevant Events & Entries.

#### To set up Action Codes for Critical Dates

- 1 Access **Control** via the CPA Inprotech Launchpad.
- 2 Select **Events & Entries** from the *Controlling* field.
- 3 Right-click in the *Action* field to access the **Action Code Pick List**.
- 4 Enter new Action Codes for critical dates.

FOR EXAMPLE:

|                             |  |
|-----------------------------|--|
| Critical Dates for Staff:   | Action Code = CD<br>Action Name = Critical Dates<br>No. of Cycles = 1        |
| Critical Dates for Clients: | Action Code = CC<br>Action Name = Critical Client Dates<br>No. of Cycles = 1 |

### To set 'Critical Dates' site controls

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Set the following site controls (per the example below):
  - Critical Dates – Internal: Character Field = CD
  - Critical Dates – External: Character Field = CC

### To set up Critical Dates in the relevant Events & Entry Rules

- 1 Access **Control** via the CPA Inprotech Launchpad.
- 2 Select **Events & Entries** from the *Controlling* field.
- 3 Ensure the *Action* field contains the following:
  - Client Critical Dates - if you are setting up critical dates for clients.
  - Critical Dates – if you are setting up critical dates for staff.
- 4 Complete other criteria fields as required.
- 5 Once the criteria fields are complete do one of the following:
  - Click [Add] to create the rule.
  - Click [Refresh] to view the current Rules for the criteria.
- 6 Double click the Rule to display the **Events & Entries** window.
- 7 Ensure all Events to be displayed in the *Critical Dates* topic are included in the list of Events.



#### TIP

At least one Rule is required for each Case Type that is available to your client. Multiple criteria Rules can be defined to extract relevant Events for specific countries, Property Types, etc.

## Setting up Reminders

Reminders can be set up for:

- **Ad Hoc Dates** and can be sent by internal users to both external and internal users. 'Ad Hoc Reminders' are set up via the Ad Hoc Date web part in Clerical, Professional or Marketing WorkBenches or via **Ad Hoc Reminders** in CPA Inprotech.
- **Events**. These reminders are referred to as 'Event-Related Reminders' and are set up via **Control** in CPA Inprotech. Reminders are attached to an Event via the **Reminders** tab on the **Event Control** window. These reminders are automatically created and sent by Policing when the Event occurs for the case.

The Reminder dates are displayed on the To Do web part for internal (i.e. Clerical, Professional and Marketing WorkBenches) and external (i.e. Client WorkBench) users.

### Reminders for External Users

Client WorkBench users can view, delete and mark a reminder as Read or Unread. External users can also finalise Ad Hoc Reminders. When a reminder is finalised, no further reminders are displayed.



#### TIP

Reminders for Events that have already occurred are not displayed.

### Reminders for Internal Users

Clerical, Professional and Marketing WorkBench users can search for Event-Related and Ad Hoc Reminders. Access to the search facility is determined by the permissions granted in the Role/s assigned to each user. A powerful tool within this facility is the ability to develop and maintain public searches.

A Public Search can be set up and marked as the default search for all users. For example, you may decide to deny access to the Reminders Search facility to a group of users but provide them with several public searches that help with their work requirements.

Professional and Marketing WorkBench users can also be set up to view reminders as tasks/calendar appointments in Microsoft Outlook.

## Purging Reminders

Your system can be configured to automatically purge reminders that are no longer required from your database and integrated systems such as Microsoft Outlook via a site control. Only individual (internal) staff members can override this site control.

### To purge reminders that are no longer required

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Set the *Policing Removes Reminders* site control to True.


### To override the Automatic Purge (internal users only)

- 1 Access **Names** via the CPA Inprotech Launchpad.
- 2 Select the **Attribute** tab.
- 3 Select either of the following Reminder Removal attributes:
  - Policing removes satisfied reminders
  - Reminders not removed by Policing.

## Cached Site Control Values

Site Controls values are cached when WorkBenches is first accessed. These values are refreshed at regular time intervals if your web.config contains the following entry:

```
<!-- interval by which the site control cache will be refreshed:
in minutes -->
<add key="sitecontrolExpiration" value="10" />
```

-  The default value for this setting is 10 minutes, this means that changing the value of a site control may not be immediately reflected in WorkBenches.

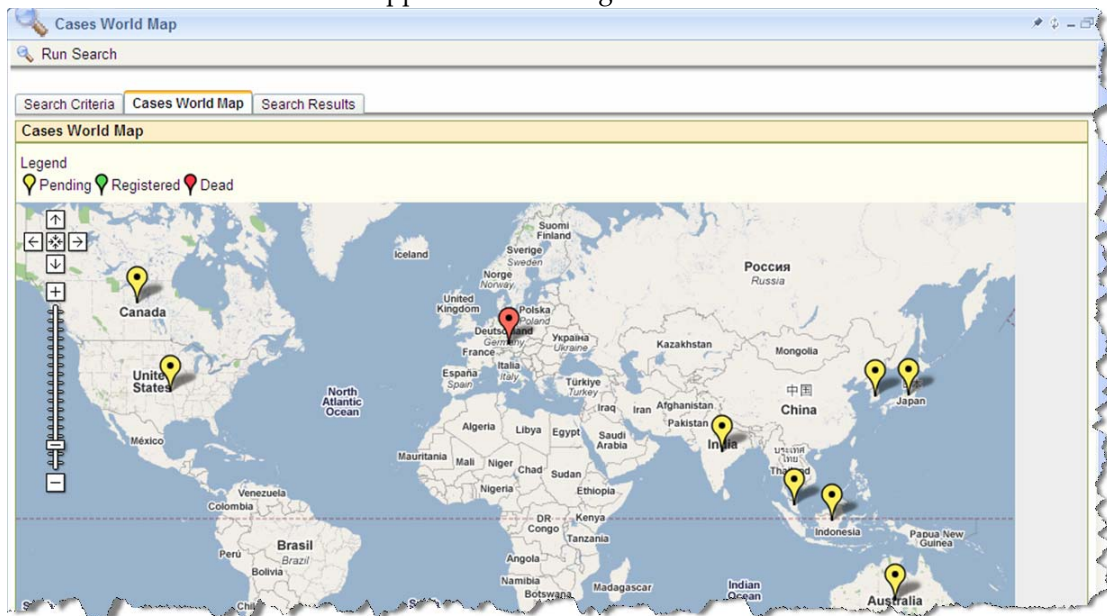
If the changes made to site control values are *not* reflected in WorkBenches it is recommended that you:

- Check the web.config file contains the above entry.
- Wait 10 minutes for the cached site control values to be refreshed.
- Click [Refresh] in your browser to refresh the settings.
- Log out and back into WorkBenches.

# The Cases World Map

The Cases World Map shows where the firm has cases throughout the world:

- trade mark registrations
- pending applications
- ceased or cancelled applications and registrations.



The map can be included in letters or printed on the front of reports.

Coloured markers indicate the status of cases in a country:

- yellow: no registered cases, but at least one pending case in the country
- green: at least one registered case in the country
- red: only dead cases in the country

## Setting up the Cases World Map

Firms requiring this functionality will need to perform the following tasks:

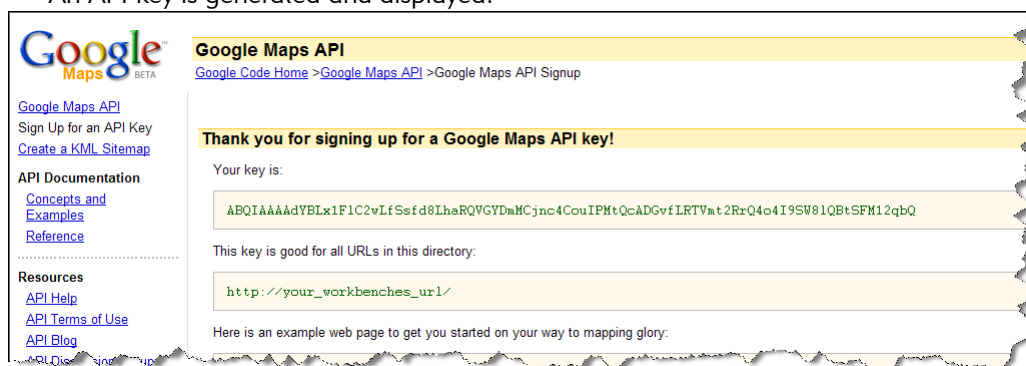
- 1 Grant roles access to the Cases World Map security task under the Case Search feature.
- 2 Generate a Google Maps API keys
- 3 Update Web.Config to configure the following keys:
  - CasesWorldMap\_InternalKey for Professional/Clerical WorkBench sites
  - CasesworldMap\_ ExternalKey for Client WorkBench sites

## Generating Google Maps API keys

Separate keys need to be generated for Professional/Clerical WorkBench sites and for Client WorkBench sites.

- 1 Open Internet Explorer and browse to <http://code.google.com/apis/maps/signup.html>
- 2 Scroll down the page and then:
  - Read the terms and conditions and then select the checkbox
  - Type the WorkBenches URL and then Click [Generate API Key].

An API key is generated and displayed:



- 3 Copy the API Key to the windows clipboard.

## Updating Web.Config with the API keys

- 1 Open Web.Config with a text editor.
- 2 Scroll down to the section
 

```
<!-- Keys required for Cases World Map functionality -->
```
- 3 Insert the API key for **internal users** between the inverted commas after value on the following line
 

```
<add key="CasesWorldMap_InternalKey" value="" />
```
- 4 Insert the API key for **external users** between the inverted commas after value on the following line
 

```
<add key="CasesWorldMap_ExternalKey" value="" />
```


The entries in this sections should look something like this:

```
!-- Keys required for Cases World Map functionality -->
<add key="CasesWorldMap_InternalKey"
value="ABQIAAAAdYBLx1F1C2wLfSsf8LhaRQVGyDmMCjnc4CouIPMtQcADGvfLRTVmt2RrQ4o4I9SW8lQBtSFM12qbQ" />
<add key="CasesWorldMap_ExternalKey"
value="ABQIAAAAdYBLx1F1C2wLfSsf8LhaRQs3YK5Zsi2ezX11gY0hIT0bD8hwRQvQ
_raWurtIeFMkHNU6-qXGC-IFQ" />
```

- 5 Save and close the file.

# Setting up Client WorkBench

## Publishing your Data

-  The Client WorkBench allows you to make information from CPA Inprotech available to people outside the firm. This raises a number of issues to consider.
- **What nature of information should be available to clients?** Some data is for internal use only, e.g. you may want to publish the Instructor for the case, but not the Agent.
  - **What additional information can clients access?** Data that is acceptable for internal use may need to be reviewed before making it available to clients.
  - **What information is important to the client?** The client has a different point of view, e.g. events that are critical to the firm and its internal processes may be of no interest to your clients and vice versa.
  - **Who should be authorised to access a client's data** given that is to be published?



### TIP

If you are converting from the Web Access Module to the Client WorkBench, see ["Appendix B: WAM – Client WorkBench Conversion"](#) on page 104.

## What to publish?

The Client WorkBench may be configured to show:


- **Names Information. However:**
  - Detailed information is only available for names defined as client-related.
  - External users can see minimal information, such as name, address and contact details, about other relevant names.
  - External users can view the Name Aliases set up against their name in **Names** in CPA Inprotech.
- **Case Information. However:**
  - A client may only access cases where they are acting in an appropriate role. For example, the client may see cases if they are acting as Instructor or Agent.
  - Access may be limited to specific Case Types, e.g. Properties but not Oppositions.
  - The names related to the case may be limited based on Name Type. For example, the Debtor may be shown, but not the Agent.
  - Data relating to Dead cases can be masked or suppressed.
  - While free-format text may be entered against cases, the published text may be limited based on Text Type.
  - Standing Instructions associated with a case can be restricted by Instruction Type.
  - The Events shown may be limited to those classified as having a particular Level Of Importance to the client.
  - Notes can be stored against Events (i.e. event text) via the *Event Text* field on the **Case Event Entry** tab in **Cases** and via the *Annotate Due Date* task in the Professional WorkBench.
- **Financial Information** – This information display can be configured.



## Restricting Cases

Clients can only access cases that belong to the organisation with which they are associated. The cases displayed to a client can be restricted by:

- **Name Type Relationships** – Cases are displayed according to the client's role on the case. For example, if the name types Agent and Instructor are selected, then only cases where the client is the Agent and / or Instructor are displayed.
- **Case Types** – only specific types of cases are displayed to client users.
- **Case Status** - Dead cases can be masked, to list only Pending and Registered cases.

 If Access Accounts are set up, saving changes to the following site controls may take considerable time as certain case data is recalculated and saved during the updating process. This recalculation ensures that clients have fast access to case details.

### To restrict cases by Name Type

Enter the required Name Type codes in the *Character* field of the Client Name Types site control.

### To restrict cases by Case Type

Enter the required Case Type codes in the *Character* field of the Client Case Types site control.

### To restrict cases to display only Pending and Registered Cases

Set the Client Exclude Dead Cases Stats site control to True.

## Restricting Case Details

You can prevent case details such as Associated Names, Standing Instructions and Text from being displayed to clients.

### To restrict associated names

Enter the required Name Type codes in the *Character* field of the Client Name Type Shown site control.

These codes identify the type of relationship a name must have with a case for it to be displayed to clients.

### To restrict standing instructions

Enter the Instructions Types that your firm wants to display to clients in the *Character* field of the Client Instruction Types site control.

If you include the "R" (Renewal Instruction) type, extra Case Summary information can be viewed. This includes the Sub Type, Instructor Name Code and Renewal Instruction details description.

### To restrict free format text

Enter the required Text Type codes in the *Character* field of the Client Text Types site control.

## Modifying Client Case Details (4788)

With the correct security permission to the *Connect As* Task a staff member can connect on behalf of a client and view information usually only accessible by that client and run searches and reports on the client's portfolio.

However, certain maintenance tasks can also be performed by a staff member while accessing client information in this way.

To modify client Case details, the CANIMPERSONATE flag needs to be set to '1' for selected Tasks using an SQL update script.

Example:

```
UPDATE TASK SET CANIMPERSONATE='1' WHERE TASKID=60" -- Maintain Client Request
```

The following is a list of tasks that can be flagged (and which can be tracked as being performed by the staff member):

- Provide Instructions
- Create and Maintain external users
- Create Name when creating external users
- Maintain Case Search
- Maintain Name Search
- Maintain Case Fee Search
- Maintain Request Search
- Maintain My Links
- Maintain (delete, mark-read, mark-unread) Client To Do
- Change Password
- Change My Preferences
- My Portal Configuration
- New Client Request

## Masking Dead cases from the Total Case Count

You can suppress/hide the number of Dead cases on file so that the Total Case Count on the Name Details **Additional Information** topic only shows a count for Pending and Registered cases.

### To mask Dead cases from the Total Case Count

- 1 Set the *Client Exclude Dead Case Stats* site control to True.
- 2 To search for cases associated with the name that are Pending or Registered only, click the Total Associated Cases link.

Should you need to check outstanding bill details related to dead cases, data on Dead cases can still be retrieved via an Advanced Case Search.

## Displaying Name Aliases

Name Aliases stored in CPA Inprotech can be displayed to clients via the Name Summary web part and the Reference topic of the Name Details web part. To display name aliases the *Client Name Alias Types* site control must contain the types of Name Aliases that clients can view.

## Displaying Events

There are potentially a large number of events on your database. Many of these may relate to internal work processes that are of no interest to your clients. Also, events that are critical to your clients may not have the same importance level for your firm and vice versa. For example, a Renewal Reminder event may be of Normal importance to your firm, but of Critical importance to the client.

An importance level from the client's perspective must be assigned to each event. This importance level is defined in the *Client Importance Level* field on the Event Pick List in CPA Inprotech. Specifying a Client Importance Level lets you control the events that are displayed in the WorkBench. By default, the Client Importance Level is set to the same value as the Internal Importance Level for all events. We recommend you review all events and assign the appropriate Client Importance Level to each event.

### To set up the Client Importance site control

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Enter the minimum level to be displayed in the *Client Importance* site control. This site control allows you to display only those events that are relevant to your clients.
- 3 Click [Save].

### To assign a Client Importance Level to an Event

- 1 Access **Control** via the CPA Inprotech Launchpad.
- 2 Select **Events & Entries** from the *Controlling* field.
- 3 Click [Refresh].
- 4 Double click a Rule in the Criteria table to display the **Events & Entries** window.
- 5 Clear the *Events* field and press F2 to display the **Events Pick List**.
- 6 Click [Maintain].
- 7 For each event that requires a Client Importance Level:
  - Select the **Event** from the list.
  - Select the appropriate **Client Importance Level**
  - Click [Update].
- 8 Click [OK] to close the pick list and return to the **Events & Entries** window.

## Event Definition & Notes

Client users may not be literate in intellectual property terms, or may use different terminology to that used internally. To help alleviate this problem hover text is available when the cursor is moved across an event.

Included in the hover text is the definition stored against the event in the Event Pick List in Inprotech. We recommend that you review the definition for each event, that can be displayed in Client WorkBench, to ensure the description is written from the point of view of your clients.

| Due Date    | Event                           | Official No. |
|-------------|---------------------------------|--------------|
| 10-Feb-1993 | Application convention deadline |              |
| 10-Feb-1993 | Applic                          |              |
| 03-Jan-1996 | Applic                          |              |
| 08-Jan-1996 | Produce application forms       |              |
| 02-Feb-1997 | Application convention deadline |              |
| 03-Oct-1998 | Application convention deadline | PQ0234       |
| 15-Oct-1998 | Registration fee paid           | 12333        |

Notes that are stored against an event via the **Events Notes – Web Page Dialog** window in the Professional WorkBench can also be included in the hover text. To include text ensure the Client Event Text site control is set to True.

## Identifying CPA Renewal Dates

Renewal dates can be obtained from your firm's internal case events rules or via the CPA Renewals Service, depending on how your firm manages renewals. If required, you can identify CPA obtained renewal dates with the *CPA* icon by setting the Clients Unaware of CPA site control to False. If this site control is set to True the *CPA* icon is suppressed. *CPA* ←

## Generating the 'Case Fee Budget' Report

If you want to be able to generate the 'Case Fee Budget' report (which consolidates Fees & Charges information) for Client WorkBench users, you need to ensure that any Charge Types to be included in the report have the following Events defined:

- **'Charge is Due Event'**: otherwise the charge will *not* appear in the report
- **'Charge Incurred Event'**: otherwise the charge will always be treated as if it hadn't been incurred. (This event is defined via CPA Inprotech's **Charge Type Pick List**.)

## Public Searches

Internal users can save external Public Searches for use by all external users, and their Default Presentations can then be protected from being over-written during future upgrades.


For general details on setting up Public Searches see the [Common WorkBench Functionality](#) section called “Search Facility” on page 46.

### Setting up Public Searches for External User Use (4795)

The **Connect As** task allows internal users to log in as an external user and log in as a selected internal user - so as to be able to set up and save case-related Default Searches as ‘Public’ ones, thereby:

- making these available not only to all other users of the same external Access Account
- making them visible to users of other external Access Accounts.

The utility that performs the Connect As task can also be used to modify default presentations for clients so that columns cannot be removed but new columns can be added.

-  To run the utility you must have the technical skills and security to make changes to the database. You need to be able to locate the key of the saved search to be converted, and to execute a stored procedure directly on the database, and provide the appropriate parameters.

#### To set up a Public Search for all external users to use

- 1 From the User Search Web Part, select the `Connect As Task`.
- 2 Select the appropriate external user login.  
The Connect As task enables you, as an internal user, to be logged out and then logged in as the selected internal user.
- 3 On behalf of your external users, set up a Search Definition for each global external search required (for example, Case Search, Case Fee Search, etc.) and save it as ‘Public’.
- 4 Login as an external user and each of the above searches with the required presentation that is to become its default presentation.
- 5 Run the `util_Publish Query` stored procedure for each saved search to be converted to a global external search.
- 6 Optionally, then run the `util_Default Presentation` stored procedure for each saved search to protect the default presentation for each being over-written when an upgrade is carried out.
- 7 Then log in as another external user (unrelated to the first external usergroup) to check that the same default Public Search you just set up uses the correct default presentation you specified.

### Protecting Default Presentations from being Overwritten

### (5015)

You can flag any case-related default presentations that were created or modified (using the above utility) as 'protected' to prevent these from being overwritten during future upgrades of the **Client WorkBench** Module. This ensures that if a default presentation is marked as such, the upgrade will not add, remove or change any display or sort columns for that presentation.

#### To protect Default Presentations from Search Definitions from being over-written

---

- Simply run the stored procedure mentioned in Step 6 of the previous instruction.

## Due Dates


Due Dates can be generated:

- Automatically by events that are associated with a case. Case events are defined in **Control** in CPA Inprotech.
- Manually using the Ad Hoc Dates facility in Professional and Marketing WorkBench or Ad Hoc Reminders in CPA Inprotech.

## Overdue Dates

Client WorkBench users can access a list of the tasks to be carried out on their case portfolio through the To Do web part. This list only includes tasks where the Due Date is not yet satisfied. If your firm does not have Events and Entry rules that ensure all Due Dates become satisfied, you can limit the access of your clients to overdue dates by using the Client Due Dates: Overdue Days site control.

The value set up in this site control is used as the lower limit for displaying due dates in What's Due. To stop all overdue dates from being displayed, the Client Due Dates: Overdue Days site control should be set to 0.

-  Only those Events identified as relevant to client users are shown in WorkBenches. This is achieved by setting the *Client Importance* level for the Event.

## Masking Due Dates for Dead Cases

You can suppress or hide Due Dates for Dead cases so these don't list in the What's Due list, thereby reducing the confusion that results from seeing Due Dates for actions related to dead cases (such as archiving) that seldom require client intervention.

### To mask Due Dates for Dead cases

- 1 Set the Client Importance site control to the required level.
- 2 Set the Client Importance level for those Events that will occur when the case is 'Dead' to lower than that set in Step 1.

However, when a client wants a historical record of their intellectual property or when a client wants to see if a 'dead case' follow up action, such as archiving, has been carried out or is about to occur, Due Dates relating to Dead cases can still be searched on and retrieved via the Advanced Case Search window.

## Responding to Due Dates via E-mail

Client WorkBench users can respond to due dates by e-mailing instructions to the staff member responsible for the case. To use this facility, the e-mail of the staff member must be set up via **Names** in CPA Inprotech.

## Client Requests

### General or Case Specific Requests

External users can submit general or case specific requests, such as questions, instructions or amendments, from the Client WorkBench. Each request is referred to as a Client Request and can be viewed via the **Advanced Request Search** in both the internal and external WorkBenches. Users with access to the Marketing WorkBench will also be able to view requests via the Advanced Activity Search.

Before using the request functionality, it is recommended that you review the different type of requests made by your clients and set up each request type as Activity Categories.

### Reviewing your Request Types

#### To define the different Request Types

- 1 Access **Tables** via the CPA Inprotech Launchpad.
- 2 Access the **Activity Category Pick List**, and set up each Request Type as an Activity Category.
- 3 Access **Site Control** via the CPA Inprotech Launchpad. Select the Client Activity Categories site control, to ensure that external users only will have access to suitable categories, record each category.

### Raising a Request

A request can be raised from the *Task* menu on the Navigation Bar or while working with cases. When raising a request certain information is automatically populated. The information populated depends on how the request is raised. If it is raised:

- from the *Task* menu on the Navigation Bar, *Regarding Name* is populated with the Client Organisation name
- while working with cases (i.e. from the Case List, Case Summary or Case Details web part), the *Regarding Name* is populated with the Instructor for the case; *Our Case Reference* contains the current case number and *Summary* is populated with information configured from your database.

#### To configure the Summary information

- 1 Set up the Client Request Case Summary site control so that it contains the name of the Doc Item used to retrieve the information for the *Summary* field.  
The sample Doc Item EG\_CLIENT\_REQUEST\_SUMMARY, can be viewed via **Item Maintenance** in CPA Inprotech.
- ① The Doc Item used must accept case reference as the entry point and may not be implemented as a stored procedure.



## Activating E-mail Notifications

When a request is submitted Client WorkBench can be configured to automatically send an e-mail to a central location with the following information:

- From e-mail address – populated with the e-mail address of the user currently logged on to the Client WorkBench
- To e-mail address – populated with the central e-mail address defined in the Client Request Email Address site control
- Subject – populated with information retrieved from your database by the doc item specified in the Client Request Email Subject site control
- Body – populated with information retrieved from your database by the doc item specified in the Client Request Email Body site control.

### To activate the e-mail notification feature

---

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Set up the following site controls:
  - Client Request Email Address – enter the central e-mail address to be used.  
If this site control is not set, no e-mail will be produced.
  - Client Request Email Subject – enter the name of the Doc Item used to retrieve the information for the *e-mail subject* line.  
The Doc Items used must accept the key of the contact activity (as a string) as the entry point. See the sample Doc Item, EG\_CLIENT\_REQUEST\_SUBJECT, via **Item Maintenance** in CPA Inprotech.
  - Client Request Email Body – enter the name of the Doc Item used to retrieve the information for the *e-mail body*.
- 3 See the sample Doc Item, EG\_CLIENT\_REQUEST\_BODY, via **Item Maintenance**.

# Setting up WorkBenches for your Staff

## User Preferences

Various areas of WorkBenches can be tailored for internal WorkBench users. This tailoring is performed on the **Maintain User Preference** window and can be carried out by:

- **individual WorkBench users** who have the appropriate authority. Access to the Maintain User Preference window is via the Task menu (toolbar).
- **the System Administrator for individual users.** Access to the Maintain User Preference window is via the Change Preferences link on the **User Maintenance** window.
- **the System Administrator for the entire firm,** i.e. the default preferences for your firm. Access to the Maintain User Preference window is via the Task menu (toolbar).

User Preference Maintenance - Microsoft Internet Explorer prov...

User Preference Maintenance

Save | Reset | Cancel

User: internal

Name: Grey, George

Check one or more boxes to revert preference values. Information is available by hovering over each set of preferences.

☒ Language

Revert

Preferred Culture

☒ Microsoft Exchange Integration

Revert

Exchange issues alerts for Reminders ☐ ☒

Exchange Mailbox ☐ KYLEN

Receive Reminders in Exchange ☐ ☒

Exchange Alert Time ☐ 10.50


**i** Personal preferences cannot be set up for incomplete users (i.e. users with login details missing such as password, portal configuration and so on).

# Names

## Client Home Page Links

The web Home Page link for a client can be displayed in on the following:


- the **Name Summary** window
- the header section of the Name Details web part.

 If multiple addresses are stored against the name all addresses will be displayed.

### To display a client's home page web address

---

- 1 Access **Names** via the CPA Inprotech Launchpad.
- 2 Locate the name record for the individual or firm.
- 3 Select the **Telecom.List** tab and set up the web address (or more than one).
- 4 Access **Site Control** via the CPA Inprotech Launchpad.
- 5 Set up the Telecom Type – Home Page site control with the Web Home Page Telecommunications Type code.

 This code is located in the Table Maintenance.

## Name Searching

Names in CPA Inprotech can be stored with two search keys, for example, General Electric Corporation could be set up with the search keys, GENERAL ELECTRIC and GE.

The Name Search facility in WorkBenches can be configured to perform the search using:

- **Search Key 1 only.**  
If a match is found the search is stopped, if no match is found Search Key 2 is then used. In this situation Search Key 2 is only used when there is no match with Search Key 1.
- **Both Search Keys.**  
Names that match with Search Key 1 or Search Key 2 are returned.

### To use both Search Keys in a Name Search

---

- 1 Ensure the Name search with both keys site control to True.

## Events

### Filtering Events

The *Minimum Importance Level* field on the Events topic allows the user to filter the list of events. A default value for this field can be set up in CPA Inprotech via **Site Control**. When the Events topic is first displayed the default value is used to filter the list. If a default value is not specified all events associated with the case are displayed in the list.

| Events Minimum Importance Level: Critical |            |
|---|------------|
| Occurred                                  | Date       |
| Date of Last Change                       | 04-Apr-200 |
| Acceptance advertised date                | 20-Jun-200 |
| Examiner's 1st Official Action            | 01-Nov-19  |
| Application Filing Date                   | 01-Nov-19  |
| Date of Entry                             | 01-Jan-19  |
| Instructions Received Date for new case   | 01-Jan-19  |
| Earliest Priority Date                    | 01-Feb-19  |

#### To set up a default value for the Minimum Importance Level

- 1 Ensure that each Event is set up with the appropriate Internal Importance Level in the **Event Pick List**.
- 2 Access **Site Control** from the CPA Inprotech Launchpad.
- 3 Locate the Events Displayed site control and enter the importance number for the default Importance Level.

All events with an importance level equal to or greater than this default will be displayed when the Events Topic is first accessed.



### Additional CPA Renewal Information

Additional information is displayed in the Renewals topic when a case is flagged for CPA Renewals. Included in this topic are the:

- **Start Paying date** (i.e. the date CPA are to start paying the renewal) and
- **Stop Paying date** (i.e. the date CPA are to stop paying the renewal).

These dates can be automatically obtained from events that are defined in **Control** in CPA Inprotech. The Event Numbers must be recorded in the following Site Controls:

- CPA Date-Start
- CPA Date-Stop.

### Generating the 'Case Fee Budget' Report

If you want to be able to generate the 'Case Fee Budget' report which consolidates Fees & Charges information, you need to ensure that any Charge Types to be included in the report have the following Events defined:

- a '**Charge is Due Event**': otherwise the charge will *not* appear in the report
- a '**Charge Incurred Event**': otherwise the charge will always be treated as if it hadn't been incurred. (This event is defined via CPA Inprotech's **Charge Type Pick List**).

## Due Dates

Due Dates can be generated:

- **Automatically** by Events that are associated with a case. Case Events are defined in **Control** in CPA Inprotech.
- **Manually** using the Ad Hoc Dates facility in Professional and Marketing WorkBench or in **Ad Hoc Reminders** in CPA Inprotech.

## What's Due

Event and Ad Hoc Dates that are due can be viewed in a calendar format and as a list. The **What's Due Calendar** web part and the **What's Due List** web part can be added to roles and portal configurations as required. When these web parts are accessed, a default search is used to populate them with the appropriate due dates. An advanced search facility, called the **Advanced Due Date Search** is available from the calendar and the list. This facility can be used to retrieve other due dates, tailor the default search and create and maintain personal and public searches.

## Search Facility

The **Advanced Due Date Search** allows the Professional user to retrieve Due Dates according to specific search criteria. When the **Advanced Due Date Search** is accessed from the What's Due List, extra search criteria fields are available and the user can change the Due Date information displayed in the List.

Search criteria used on a regular basis can be saved as a *Personal Search* or a *Public Search*. Public searches are available to all Professional users with access to the What's Due Calendar and/or What's Due List.

- ❗ A Public Search can be marked as the Default Public Search. This search is used to automatically populate the calendar or the list when opened. A Personal Default search can be created by a Professional user to override the Default Public Search if required.

## Displaying Event Category Icons

Icons are used to identify different types of Events in the **What's Due Calendar** and the **What's Due List**. WorkBenches can be configured to display the icons of your choice. In the **What's Due Calendar**, events that are classified as critical are identified with a red flag.

### To set up the icon display

---

- 1 Locate or design an icon for each Event category.
- 2 From CPA Inprotech, set up each icon as an image in the **Image Pick List**.

### To set up each Event Category

---

- 1 Access **Control** via the CPA Inprotech Launchpad.
- 2 Access the **Event Category Pick List** from the **Event Pick List**.
- 3 Create the required Event categories.
- 4 To retrieve the icon for an Event category click [Get Image].
- 5 Close the **Event Category Pick List** and return to the **Event Pick List**.

### To modify each Event

---

Attach an Event Category to the appropriate Events via the *Event Category* field on the **Event Pick List**.

## Displaying Critical Flags

### To set up the critical flags

---

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Locate the Critical Level site control.
- 3 Enter the importance number for the minimum Importance Level.  
All Events with an Importance Level equal to or greater than the minimum level will appear in the **What's Due Calendar** preceded by a Red Flag.

## Responding to Reminders via E-mail

Internal WorkBench users can send a response for an Event-related Reminder to a central e-mail address. To use this functionality the e-mail address must be defined in the Reminder Reply Email site control in **Site Control**.

### To set up a central e-mail address for responses to Event-related Reminders

---

- 1 Access **Site Control** via the CPA Inprotech Launchpad.
- 2 Locate the Reminder Reply Email site control.
- 3 Enter the required e-mail address.

## Ad Hoc Dates

The Ad Hoc Dates facility in WorkBenches lets your staff track personal or business related dates such as appointments, anniversaries, birthdays, meetings and so on. These dates appear in the Ad Hoc Dates list and the To Do list and can be designed to be repeated on a regular basis, i.e. a reminder frequency can be defined for the Ad Hoc Date.

Ad Hoc Dates, commonly used by your firm, can be set up as Ad Hoc Templates. These templates provide your staff with a quick and efficient method for creating Ad Hoc Dates. Templates can be set up by internal users who have access to the Ad Hoc Dates functionality.

Ad Hoc templates are created and maintained on the **Ad Hoc Template Maintenance** window. Templates can be made specific by completing as many of the fields as required. When completing the reminder fields you must remember to complete both *Days* fields or both *Months* fields if sending reminders.

## Setting up Ad Hoc Template (Dates)

### To set up Ad Hoc Template (dates)

- 1 From the Ad Hoc Dates web part select Task > Maintain Ad Hoc Template. The **Ad Hoc Template List** window is displayed.
- 2 Click [New] to display the **Ad Hoc Template Maintenance** window.
- 3 Enter the appropriate Alert Code and select an Importance Level.
- 4 If sending reminders, complete a matching pair of either *Days* fields OR of *Months* fields.

- 5 Enter the appropriate Message and e-mail address of the person to whom it should be sent.
- 6 Click [Save].

## Setting up Reminders

WorkBenches can be integrated with **Microsoft Outlook** if your firm uses **Microsoft Exchange Server** for e-mail. This integration allows staff members to view case related and Ad Hoc reminders in **Microsoft Outlook**. When a reminder is first produced the Due Date is set up as a calendar appointment and a task is added to the current Task List.

## Time Management

### Timesheet

**Timesheet** allows internal users to record the work they have completed on a specific activity for a case or client. To use this facility you must ensure the following is set up.

#### To activate and set up the Timesheet facility

- 1 Ensure each user wanting to access **Timesheet** has the appropriate **Timesheet Licence**.
- 2 Ensure the CPA Inprotech **Time & Billing** module has been implemented.

### Posting Time in Batches

Time entries are posted in batches to improve the performance. The *Time Post Batch Size* site control indicates the number of entries to be included in a batch. If this site control is not defined, all time entries are processed in one batch.

Timesheet entries are validated before posting commences. If errors exist a message is displayed and posting will not proceed. If there is a failure during the posting procedure the entire batch is rolled back. The *Time Post Batch Size* site control can be used to help identify the entry that was being processed when posting failed.

Several CPA Inprotech site controls are used during the posting process. One option is the *GL Journal Creation* site control which is a flag indicating when the Live Financial Journals are to be created. This site control can be set to:

- blank – No Journals created,
- 1 – Create Journals as each transaction is processed,
- 2 – Create Journals in a separate batch run.

Option 1 (Create Journals as each transaction is processed) is not currently available in WorkBenches. If this option is selected WorkBenches behaves as though option 2 (Create Journals in a separate batch run) has been chosen, i.e. it is always necessary to use the Financial Interface to generate the journals for timesheets posted via WorkBenches.




## Displaying Warnings & Error Messages in Timesheet

Warning and error messages can be displayed when entering time in **Timesheet** for the following areas:

- **Name Restrictions** – bad debtor restrictions can be set up for clients on the **Client Details** tab of **Names**. The use of these restrictions is controlled by the Restrict on WIP site control.

If this site control is set to True the restrictions for debtors will apply as defined in the **Use Restriction Pick List** in CPA Inprotech.

 Restrictions can be set up as an error, warning or a warning requiring a password. If this site control is set to False, all restrictions are treated as warnings.

- **Credit Limit** warnings can be displayed if a credit limit is set up for a client on the **Client Details** tab of **Names** and the credit limit is exceeded.
- **Budget** warnings can be displayed if a budget is set up for a case and more than 100% of the budget has been used.
- **Prepayments** warnings can be displayed if work performed for a case or debtor exceeds the prepayments received and the Prepayment Warn Over site control is set to True.

## Marketing Information

### Sales Highlights

The Sales Highlights topic provides a marketing view point of financial information such as a breakdown of the number of live cases, YTD Billing, Receivable Balance, Payable Balance and Work In Progress.

#### To view the Days Beyond Terms statistic for the Receivable Balance

Ensure the Trading Terms site control is defined.

### Managing Activities

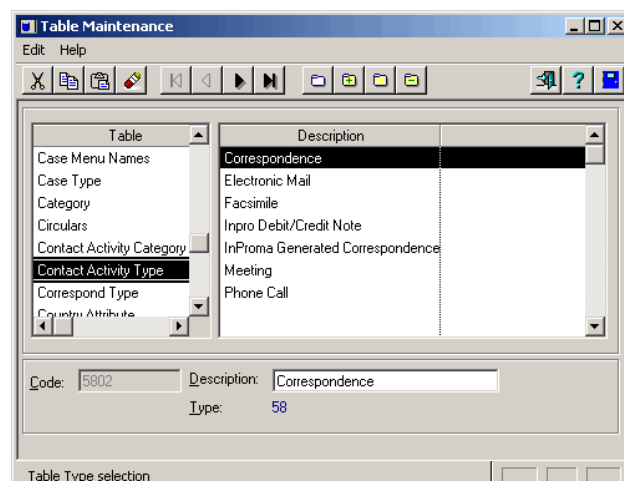
The Marketing WorkBench allows you to track individual contact with clients. Contact can be made through a variety of activities such as telephone calls, electronic mail, letters, faxes and meetings. Activities are recorded and maintained via the **Contact Activity Maintenance** window and can be categorised according to the work you are performing at the time of contact. For example, 'Client Work', 'Administration', 'Marketing' and so on.

### Managing Activity Types

The list of Activity Types available to the Marketing WorkBench is stored on the **Contact Activity Type Pick List** of CPA Inprotech. This list can be customised to suit your firm's requirements.

#### To add and maintain Activity Types

- 1 Access **Tables** via the CPA Inprotech Launchpad. The **Table Maintenance** window is displayed.
- 2 Select **Contact Activity Type** from the list of tables.  
The current list of types is displayed.
- 3 To create a new type enter the **Description** and click [Add].
- 4 To modify an existing type, select the relevant **Activity Type**, change the **Description** and click [Update].
- 5 To delete an existing type, select the relevant **Activity Type**, and click [Delete].
- 6 Click [Exit].



## Managing Activity Categories

A standard list of categories is supplied with CPA Inprotech. This list allows you to record information against areas such as Client Work, Administration, Marketing and so on. These categories can be customised on the **Activity Categories Pick List** as required.

### To add and maintain Activity Categories

---

- 1 See Step 1 above.
- 2 Select Contact Activity Category from the list of tables.  
The current list of categories is displayed.
- 3 To create a new category enter the Description and click [Add].
- 4 To modify an existing category, select the relevant Activity Category, change the Description and click [Update].
- 5 To delete an existing category, select the relevant Activity Category and click [Delete].

## Ad Hoc Word Documents

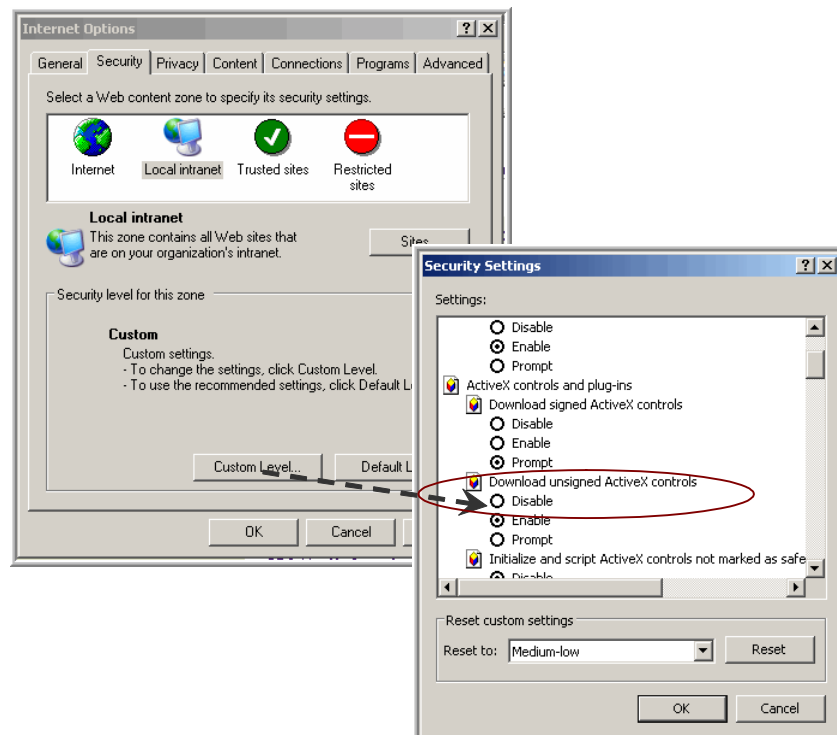
### Producing Ad Hoc Word Documents

Ad Hoc Word documents based on predefined document templates can be produced through WorkBenches. The document templates are used to extract data from the database. This data is then processed or inserted into various locations throughout the document.

This facility is only available to WorkBench users when they are directly connected to an internal network and have **PassThru** installed on their PC. The **Ad Hoc Word Document** facility is accessed by selecting **Tasks > Create a Document** on the Navigation bar.

#### To produce ad hoc documents

- 1 Ensure **PassThru** is installed and operational on the user's local PC.
- 2 Ensure the required document templates are set up.
- 3 Ensure the user's Internet Explorer security setting is set up as follows:
  - for Trusted sites
  - is enabled to Download unsigned ActiveX controls.



## Setting up Document Request Types (4710)

The Maintain Document Request Type task in the Tasks menu links to the **Document Request Type Maintenance** window\* allowing the rules to be varied for output request criteria that have been set up for clients. New Document Request Types can also be created from this window, and searches can be run per Document Request Type that allow the results to be printed or exported to PDF, Excel, etc.

- i** \*Web part and task-based security for the appropriate internal roles (via the Maintain Document Request Type Task Security under the Document Request feature) is required to access this maintenance window.

### To maintain a Document Request Type

- 1 Click Maintain Document Request Type under Maintain on the SideBar. The **Document Request Type Search Results** window is displayed.

| Document Request Type Search Results     |               |                   |
|--|---------------|-------------------|
| Document Request Type Search Results (2) |               |                   |
|  | Name          | Description       |
| Tasks ▾                                  | Action report | Action report_May |
| Tasks ▾                                  | Portfolio     | Portfolio report  |

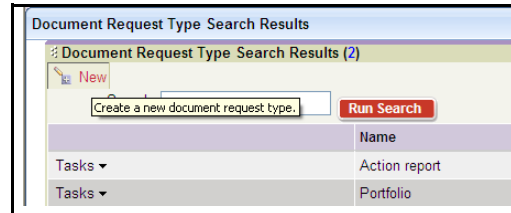
- 2 For the appropriate row select Tasks > Edit.
- 3 The **Document Request Type Maintenance** window is displayed..

| Document Request Type Maintenance   |                                     |                          |
|-------------------------------------|-------------------------------------|--------------------------|
| Name:                               | Action report                       |                          |
| Description:                        | Action report_May                   |                          |
| Can filter cases:                   | <input checked="" type="checkbox"/> |                          |
| Can filter events:                  | <input type="checkbox"/>            |                          |
| Letter:                             | Renewal Application                 |                          |
| Sender Request Type:                |                                     |                          |
| Belongs to Name Types               |                                     |                          |
| All   None                          | Name Type                           |                          |
| <input checked="" type="checkbox"/> | Agent                               |                          |
| <input checked="" type="checkbox"/> | Author                              |                          |
| <input checked="" type="checkbox"/> | Challenger (other side)             |                          |
| <input checked="" type="checkbox"/> | Challenger (our side)               |                          |
| <input checked="" type="checkbox"/> | Competitor                          |                          |
| <input checked="" type="checkbox"/> | Contact                             |                          |
| <input checked="" type="checkbox"/> | Copies To                           |                          |
| <input checked="" type="checkbox"/> | Debtor                              |                          |
| <input checked="" type="checkbox"/> | Debtor Copies To                    |                          |
| <input checked="" type="checkbox"/> | Examiner                            |                          |
| Export Formats                      |                                     |                          |
| All   None                          | Export Format                       | Default                  |
| <input checked="" type="checkbox"/> | Excel (*.xls)                       | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Flat ANSI                           | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | XML (*.xml)                         | <input type="checkbox"/> |

- 4 Amend any of the fields as necessary (see next instruction for details) and then click [Save].

## To create a new Document Request Type

- 1 Click Maintain Document Request Type under Maintain on the SideBar. The **Document Request Type Search Results** window is displayed.
- 2 Click [New] on the toolbar to access a blank **Document Request Type Maintenance** window. The **Document Request Type Maintenance** window is displayed with details of the selected Document Request Type.
- 3 Click [New] at the bottom of this window.
- 4 Complete the fields as follows:
  - **Name** Enter the name of the document to be produced.
  - **Description** Enter a description of the contents of the document.
  - **Can Filter Cases** Select this checkbox if you want to filter cases in conjunction with documents of this type.
  - **Can Filter Events** Select this checkbox if you want to filter event groups in conjunction with documents of this type.
  - **Letter** Select the letter that defines the document to be produced.
  - **Sender Request Type:** Select the request type to place on the XML output file.
  - **Belongs to Name Type:** Select any of the name types that have a relationship with the relevant case.
  - **Export Formats:** Select one or more export formats that can be used.
- 5 Click [Save].



## Staff Performance Statistics

### Viewing Statistics

Financial and Due Date statistics related to a staff member can be viewed on the **My Statistics** tab. The statistics shown on this tab are determined by the CPA Inprotech financial modules you are licensed to use. These statistics can only be accessed by internal WorkBench users from the Professional WorkBench.

#### To display Financial and Due Date statistics in Professional WorkBench

- 1 Ensure you have a licence for the following CPA Inprotech programs:
  - **Time & Billing:** to view the Hours topic
  - **Time & Billing or Charge Generation:** to view the Work In Progress topic  
to view the Work Analysis topic
  - **Accounts Receivable:** to view the Accounts Receivable topic
- 2 Access **Site Control** via the CPA Inprotech Launchpad.
- 3 Set up the following site controls:
  - Trading Terms: to view the Days Beyond Terms statistic
  - Standard Daily Hours: to enable productivity/effort percentages calculations

## Reporting Services

WorkBenches integrates with **Microsoft SQL Server 2000 Reporting Services** to allow users access to:

- **Standard reports** – which can be customised and produced (for example, the Billing Worksheet).
- **Search Results** – which can be saved and exported in basic formats. The layout for these formats can also be customised.

**Microsoft SQL Server 2000 Reporting Services** comprises two components:

- **Report Server** – which produces reports by combining data with a report definition formatted using the Report Definition Language (RDL).
- **Report Designer** - which allows users to design the layout of a report which is saved in a Report Definition Language (RDL) report template.


To enable these reporting features, several software components must be present.

## Tailoring Report Templates

To tailor a Report Template (RDL), the client PC should have a report design tool such as **Visual Studio.NET 2003** installed and the **CPASS Reporting Services Extension** integration software installed.

## Generated Reports

The layout of search results can be customised through the use of report templates (RDL). The simplest way to create an RDL is by generating it through the **Advanced Search** window of the WorkBenches.

-  Generated RDLs are stored on your Report Server in the appropriate subject area folder. For example, an RDL generated through the **Advanced Case Search** window must be stored in the `WorkBench\Case` folder.

## Folder names for Standard Reports


Standard report templates are delivered with the system. They are located on your Microsoft Reporting Services server in folders named: `WorkBench\<SubjectArea>\Standard\`  
For example, the Billing worksheet is stored in the folder: `WorkBench\Billing\Standard`

A report layout can be made up of a main report definition and a number of sub-reports. Sub-report definitions are named as follows: `<ReportName>-<Sub-reportName>`.

For example: `WorkBench\Billing\Standard\BillingWorksheet-Debtors.rdl` and `WorkBench\Billing\Standard\BillingWorksheet-Header.rdl`

The layout of these reports can be changed to suit your firm's specific needs. Once a layout is modified it must be stored in the folder called **Tailored**.

For Example: `WorkBench\Billing\Tailored`

-  If you do *not* store modified report definitions in the **Tailored** folder your changes will be overwritten when the software is upgraded.

## To tailor a Report Layout

- 1 Using **Microsoft Reporting Services Report Manager**, download the report definitions for the main report and *all* sub-reports from the `WorkBench\<SubjectArea>\Standard` folder.
- 2 Make the required changes to the report definitions using Microsoft **Visual Studio.NET 2003 Report Designer** or other text editor.
- 3 Upload report definitions for the main report and *all* sub-reports to the `WorkBench\<SubjectArea>\Tailored` folder.



## Report Terminology

The standard report definitions are delivered with field labels, column headings, etc. looked up from the terminology delivered with the system. These references should be retained if you want to produce reports in multiple languages or take advantage of custom terminology.

## Sample Report Layout

You are provided with a sample Report Layout template on the Installation CD in the `/samples/ Microsoft SQL Server Reporting Services` folder. This sample has been developed to demonstrate some of the formatting features and WorkBench integration functions available when modifying an RDL report template.

# Setting up Internet Explorer

## Overview

The default Internet Explorer settings do not work with the WorkBenches. The following tasks need to be performed on each user PC that will be accessing WorkBenches:

- Add the WorkBenches URL to Trusted Sites List.
- Set ActiveX permissions.
- Disable the pop-up blocker for the WorkBenches URL.
- Clear and check the settings of the browser cache
- Enable HTTP compression
- Check language settings

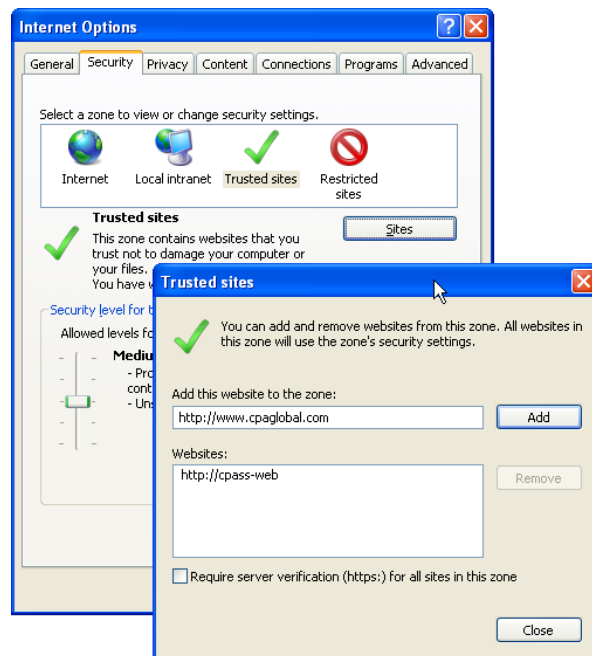
## Procedures

### Adding the WorkBenches URL to the Trusted Sites List

Adding WorkBenches URL to the trusted sites list will prevent local security settings from interfering with the WorkBench functionality.

To add the WorkBenches URL to Trusted Sites List:

- 1 Start Internet Explorer and on the Tools menu, select Internet Options.
- 2 On the Internet Options window, click the Security Tab.
- 3 On the Security tab, click Trusted Sites and then [Sites].
- 4 On the Trusted Sites window:
  - Ensure that the Require server verification checkbox is unchecked.
  - Type the WorkBenches URL in the Add this web site to zone field.
  - Click [Add].
  - Click [Close].
- 5 Leave the Internet Options window open.

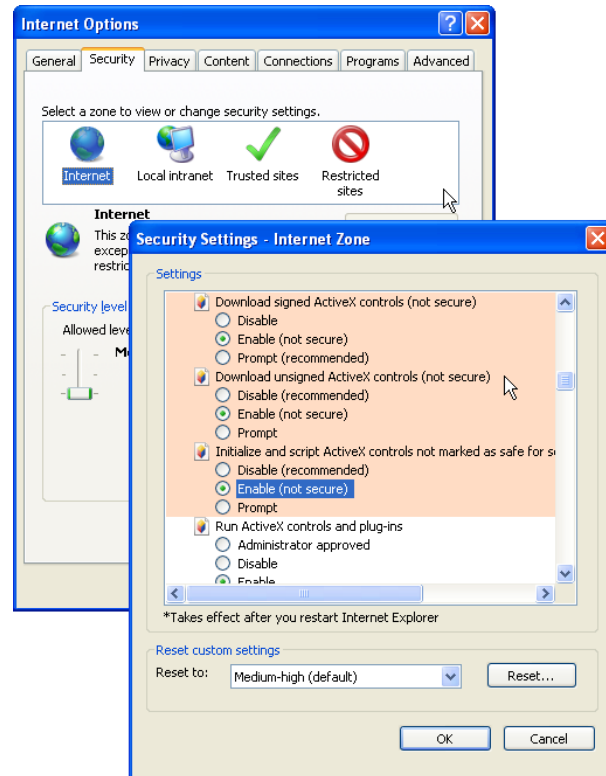


## Setting ActiveX Permissions

ActiveX is required for WorkBenches functionality.

To set ActiveX permissions:

- 1 On the Internet Options Security tab, click Local Internet and then [Custom Level].
- 2 On the Security Settings - Local Internet Zone window, scroll down to ActiveX controls and plug-ins and enable ensure the following settings:
  - Download signed ActiveX controls
  - Download unsigned ActiveX controls
  - Initialize and script ActiveX controls not marked as safe
  - Run ActiveX controls and plug-ins.
- 3 Click [OK] and leave the Internet Options window open.

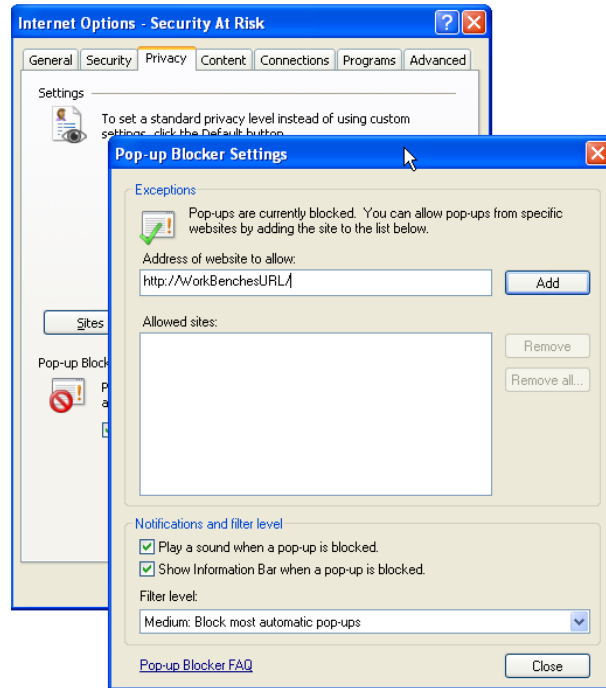


## Disabling the Pop-up Blocker for WorkBenches

WorkBenches uses pop-ups.

To allow pop-ups for WorkBenches:

- 1 On the Internet Options window, click the Privacy tab.
- 2 On the Privacy tab, leave the Turn on Pop-up Blocker checkbox checked and click [Settings].
- 3 On the Pop-up Blocker Settings window:
  - Type the WorkBenches URL in the Address of web site to allow field.
  - Click [Add].
  - Click [Close] to close the Pop-up blocker Settings window.
- 4 Leave the Internet Options window open.



## Clearing and Checking the Settings of the Browser Cache

The cache needs to be cleared so that most recent version of any page is displayed in the browser.

Procedures for clearing the cache differ according the browser version.

### For Internet Explorer 6

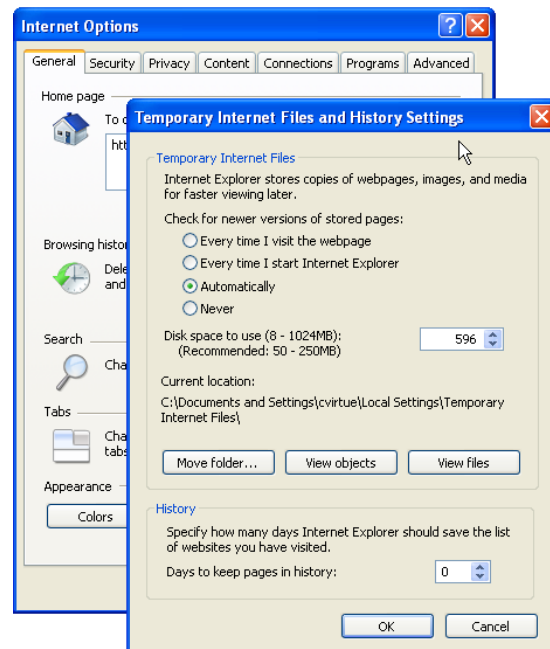
To clear the cache for Internet Explorer version 6:

- 1 On the Internet Options window, click the General tab.
- 2 On the General tab click [Delete Files] in the Temporary Internet files section.
- 3 On the Delete Files window, tick the Delete all offline content checkbox and then click [OK]. The Delete Files window closes.
- 4 In the Browsing History section on the Internet Options window, click [Settings].
- 5 On the Temporary Internet Files and History Setting window, select the Automatically option and then click [OK]. The Temporary Internet Files and History Setting window closes.
- 6 Leave the Internet Options window open.

### For Internet Explorer 7

To clear the cache for Internet Explorer version 7:

- 1 On the Internet Options window, click the General tab.
- 2 On the General tab click [Delete] in the Browsing History section.
- 3 On the Delete Browsing History window:
  - Click [Delete files].
  - Click [Yes] to confirm.
  - Click [Close].
 The Delete Files window closes.
- 4 In the Browsing History section on the Internet Options window, click [Settings].
- 5 On the Temporary Internet Files and History Setting window, select the Automatically option and then click [OK]. The Temporary Internet Files and History Setting window closes.
- 6 Leave the Internet Options window open.

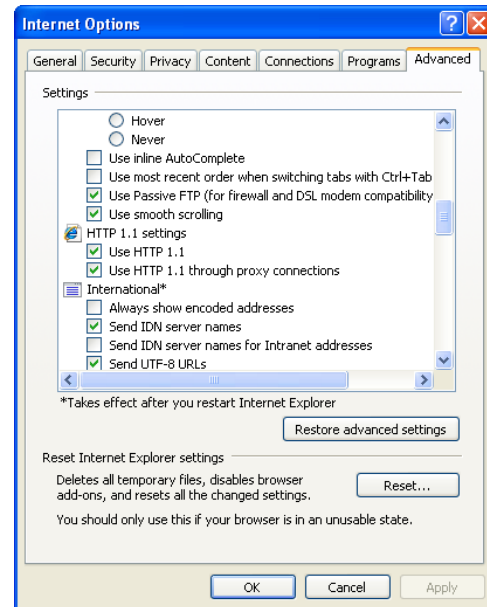


## Enabling HTTP Compression

HTTP compression provides for smaller web page downloads, resulting in improved response times.

To enable HTTP compression:

- 1 On the Internet Options window, click the Advanced tab.
- 2 On the Advanced tab, scroll down to HTTP 1.1 settings and ensure the following checkboxes are ticked:
  - Use HTTP 1.1
  - Use HTTP 1.1 through proxy connections
- 3 Click [Apply] and leave Internet Options open.



## Checking Language Settings

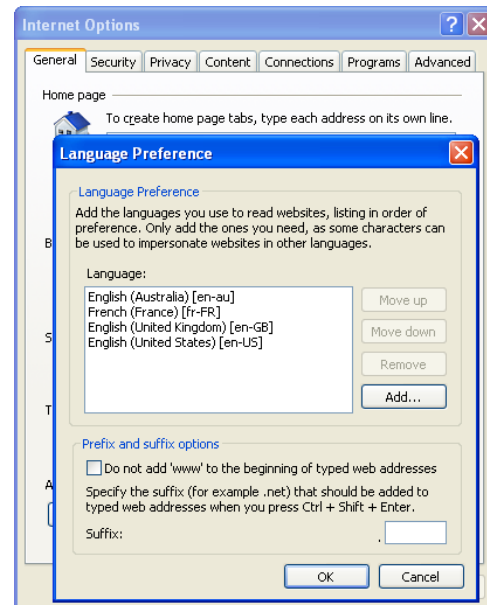
The following languages can be used with WorkBenches:

- English (United Kingdom)
- English (United States)
- French (France)
- German (Germany)

If the default, user-defined language is not in the above list, you will need to add one of the languages listed or WorkBenches may not function properly.

To check language settings:

- 1 On the Internet Options window, click the General tab.
- 2 On the General tab, click [Languages].



- 3 On the Language Preference window, review the list of languages. Is one of the four languages that can be used with WorkBenches listed?

| If... | Do this...  |
|-------|---|
| Yes   | <ul style="list-style-type: none"> <li>• go to the next step.</li> </ul>  |
| No    | <ul style="list-style-type: none"> <li>• click [Add]</li> <li>• select a language from the list</li> <li>• click [OK] to close the Add Language window</li> <li>• go to the next step.</li> </ul> |

- 4 Click [OK] to close the Language Preference window.
- 5 click [OK] again to close Internet Options.

# Troubleshooting

---

## Clearing Cached Memory

Many configuration options are cached in memory to improve performance. If your configuration changes are *not* visible, it is likely that WorkBench still has the old version cached in memory. You need to clear the cache.

To clear the memory cache so configuration changes can be viewed

---

Stop and restart **Internet Information Services** manually via **IIS** or using the **iisrestart** program.

## WorkBench Login Page not Displaying for the URL

To rectify this problem, ensure that default.aspx is the list of Default documents in the CPAInpro virtual directory.

## Refreshing Cached Site Controls

If changes made to site controls in CPA Inprotech are not reflected in WorkBench you need to check that your `web.config` file contains a valid Refresh Value.

If the changes made to site control values are not reflected in WorkBench, after the Refresh period is waited out, it is recommended that you do the following:

To refresh cached site control values

---

- 1 Check the `web.config` file contains the above entry.
- 2 Wait 10 minutes (or the period you set for this value) for the cached site control values to be refreshed.
- 3 Click [Refresh] on your browser to refresh the settings.
- 4 Log out and back into WorkBench.

## Setting the Timeout Value for SQL commands

The default maximum period of time allowed for an SQL query to successfully complete when run via WorkBench, is 120 seconds. On some databases, this amount of time may *not* be sufficient and it can therefore be amended in the `web.config` file.

To increase the default maximum time

---

- 1 Open the `web.config` file using a text editing program.
- 2 Define the `SqlTimeout` in the `<appSettings>` section by setting the number of seconds for the maximum length of the `SqlTimeout`, for example,  

```
<add key="SqlTimeout" value="200" />
```



This sets the maximum length of time to 200 seconds.

- 3 Click [Save] then close the `web.config` file.

## Identifying Posted Time Errors

Time entries are posted in batches to improve performance. If a failure occurs, the whole batch is rolled back. To identify the time entry causing the failure, the *Time Post Batch Size* site control should be set to 1 and the posting process restarted. WorkBench will then post one entry at a time. When the entry in error is processed posting is stopped and the entry can be reviewed.

- ❗ The posting process is considerably slowed down when this site control is set to 1.

## Fixing Advanced Name Search Errors

Certain advanced name searches may cause either of the following to occur:

- The following Internet Explorer error, forcing the user to close the browser.



- The Advanced Name Search Results web part displays no results just the loading icon.

### To rectify the display of Advanced Name Searches

- 1 Ensure the following Hotfix is installed on the user's PC:  
*Hotfix for MSXML 4.0 Service Pack 2 - KB832414.*  
❗ This update contains Microsoft XML (MSXML) functionality allowing applications using MSXML to continue to function correctly after Security Update 832894 for Internet Explorer, has been applied.
- 2 For full details, go to the following link: <http://www.microsoft.com/downloads/details.aspx?familyid=341caf5f-0cdd-47a8-af5d-91e14fcf7a0d>

## Verifying the ABCPDF Utility for Printing PDFs

The **ABCPDF** utility allows WorkBench to print Case, Name and other details in a PDF format. If you lose this functionality you will need to re-register the utility and check the correct permissions have been set up for its use.

### To re-register the ABCPDF utility

- 1 Ensure the following necessary files were copied, during installation to your `CPAInpro\Workbenches\bin` directory:
  - **ABCpdf.dll**
  - **ABCpdfCE5.dll**

- **ABCPDFRegistration.exe**
- 2 To register the ABCPDF component:
    - Locate the `bin\ABCPDFRegistration` folder.
    - Run the `ABCPDFRegistration.exe`.

### To check the appropriate Security settings have been set up

- 1 For the local ASPNET user (ASP.NET Machine Account) set these IIS File permissions:

|   |                   |
|---|-------------------|
| Web Site Root Folder (i.e. Drive:\inetpub\wwwroot)                  | Read              |
| Application Folder (i.e. Drive:\inetpub\wwwroot\cpainproma)         | Read              |
| %Windows%\Microsoft.NET\Framework\v1.1.4322                         | Read              |
| %Windows%\Microsoft.NET\Framework\v1.1.4322\Temporary ASP.NET Files | Full Control      |
| %TEMP%  | Read/Write/Delete |
| %Windows%\assembly  | Read              |
| %Windows%\System32  | Read              |

- 2 Ensure that the ASPNET user is added to the following Local Security Policy settings:
    - Access the computer from the network
    - Logon on as a batch job
    - Logon as a service.
  - 3 Ensure the following Deny settings are cleared for the user:
    - Deny access to this computer from the network
    - Deny logon as a batch job
    - Deny logon as a service
  - 4 Specific to the Print to PDF function, set the following for the ASPNET user:
    - Read/Write access to the ASPNET users' own temp directory and settings.
    - Read access to the Registry.
- i** If you are using Anonymous Authentication, the same permissions may need to be set for the Anonymous User account. Check the above settings thoroughly first.

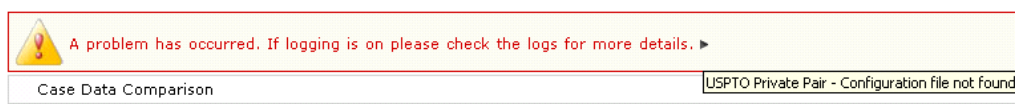
## Resolving access to the USPTO Private PAIR site

The following are two errors users are likely to encounter, and their possible cause.

### 1) USPTO.Private configuration file not found.

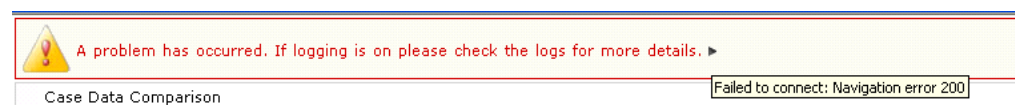
Displays if the configuration file for the USPTO Private PAIR is not present. You need to ensure that the

`CPASS.Integration.DataExtract.USPTO.Private.Collector.config` file exists in the BASS directory.



### 2) Failed to connect: Navigation error 200.

Displays when there are problems accessing the USPTO Private PAIR site, so you need to follow the instruction below to check if the anonymous user being used by WorkBenches has the necessary requirements for accessing USPTO Private PAIR.



If the problem still occurs, reset the IIS and ask users to log in again to WorkBenches.

## To check the Anonymous User has been set up to access USPTO Private PAIR

- 1 Open Internet Information Services and locate the WorkBenches virtual directory.
- 2 Right-click and select Properties.
- 3 Select the **Directory Security** tab, and click [Edit].
- 4 On the **Authentication Methods** window note the UserName.
- 5 Go `Start > Settings > Control Panel > Administrative Tools > Local Security Settings`.
- 6 Under Security Settings, select `Local Policies > User Rights Administration > Act as part of the operating system`.
- 7 If the Anonymous Access Windows user is not in the list, you need to configure the Impersonate section in the appropriate configuration file.
- 8 Logon to the PC with the above user accounts, and then logon to the USPTO Private PAIR site.
- 9 If you can access the USPTO site, ensure that the Data Collector is not being blocked by a Firewall.

# Appendices

## Appendix A: Permissions to Access Features

### Valid Permission Values

Permissions are used to identify the Web Parts, Tasks and Subjects that are available within a role. Multiple roles can be assigned to a WorkBench user, therefore the Web Parts, Tasks and Subjects available to a user are determined by a combination of the permissions defined for each role. The following permissions are used for Web Parts, Tasks and Subjects:

| SYMBOL                              | MEANING | INDICATES  |
|-------------------------------------|---------|--|
| <input checked="" type="checkbox"/> | Granted | Applies permission thereby allowing access to the information. This permission can be overridden by a Denied permission from another role.                   |
| <input type="checkbox"/>            | Revoked | No permission is granted.  |
| <input checked="" type="checkbox"/> | Denied  | Removes permission and prevents the user from gaining access regardless of permissions specified in other roles. This permission overrides all other rights. |

### Web Part Security

Web Parts can be classified as **Mandatory**, **Available for Selection** or **Access Denied** in a Role according to the permissions specified in the **Access** and **Mandatory** checkboxes. The table below outlines valid combinations for Web Part Permissions.

| IF ACCESS                           | + MANDATORY                         | THE WEB PART ...   |
|-------------------------------------|-------------------------------------|--|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <ul style="list-style-type: none"> <li>must appear in the portal configuration of users with this role</li> <li>is inaccessible if user has another role where Access is Denied</li> </ul>   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <ul style="list-style-type: none"> <li>is available for selection in the portal configuration of users with this role</li> <li>is inaccessible if user has another role where Access is Denied</li> </ul>  |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <ul style="list-style-type: none"> <li>is available for selection in the portal configuration of users with this role</li> <li>cannot be made mandatory by any other role</li> <li>is inaccessible if user has another role where Access is Denied</li> </ul>  |
| <input type="checkbox"/>            | <input type="checkbox"/>            | <ul style="list-style-type: none"> <li>is unavailable for selection to users with this role</li> <li>is available if user has another role where Access is Granted</li> <li>is mandatory if user has another role where Access is Granted and Mandatory is Granted</li> <li>is inaccessible if user has another role where Access is Denied</li> </ul> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <ul style="list-style-type: none"> <li>is inaccessible to user and cannot be made available through any other role</li> </ul>  |

## Task Security

Permissions are defined for Tasks that can be executed and maintained (Add, Update and Delete) for example, run a search and save a search. The Granted, Revoked and Denied permissions are specified in the **Execute**, **Add**, **Update** and **Delete** checkboxes according to the requirements of the role. The tables below outline the **Valid Permissions**.

| IF <b>EXECUTE</b> PERMISSION IS               | A WORKBENCH USER WITH THIS ROLE...  |
|---|---|
| <input checked="" type="checkbox"/> (Granted) | can perform the task – which becomes unavailable to users with another role where Execute is Denied   |
| <input type="checkbox"/>                      | cannot perform the task. – which can be made:<br>- available <i>if</i> user has other role where Execute is Granted<br>- unavailable <i>if</i> user has other role where Execute is Denied. |
| <input checked="" type="checkbox"/> (Denied)  | cannot perform the task – which <i>cannot</i> be made available through any other role.   |
| IF <b>ADD</b> PERMISSION IS                   | A WORKBENCH USER WITH THIS ROLE...  |
| <input checked="" type="checkbox"/> (Granted) | can insert data associated with the Task - which becomes unavailable <i>if</i> user has another role where Add is Denied.   |
| <input type="checkbox"/>                      | cannot insert data – which can be made:<br>- available <i>if</i> the user has other role where Add is Granted<br>- unavailable <i>if</i> the user has other role where Add is Denied.       |
| <input checked="" type="checkbox"/> (Denied)  | cannot insert data – and Task <i>cannot</i> be made available through any other role.   |
| IF <b>UPDATE</b> PERMISSION IS                | A WORKBENCH USER WITH THIS ROLE...  |
| <input checked="" type="checkbox"/> (Granted) | can modify data associated with the Task – which becomes unavailable <i>if</i> user has other role where Update is Denied.  |
| <input type="checkbox"/>                      | cannot modify data. Task can be made:<br>- available <i>if</i> user has other role where Update is Granted<br>- unavailable <i>if</i> user has other role where Update is Denied.           |
| <input checked="" type="checkbox"/> (Denied)  | cannot modify data. Task <i>cannot</i> be made available through any other role.  |
| IF <b>DELETE</b> PERMISSION IS                | A WORKBENCH USER WITH THIS ROLE...  |
| <input checked="" type="checkbox"/> (Granted) | can delete data associated with the task.<br>Deleting data becomes unavailable <i>if</i> the user has another role where Delete is Denied.  |
| <input type="checkbox"/>                      | cannot delete data. Task can be made:<br>- available <i>if</i> user has other role where Delete is Granted<br>- unavailable <i>if</i> user has other role where Delete is Denied            |
| <input checked="" type="checkbox"/> (Denied)  | cannot delete data. Deleting data <i>cannot</i> be made available through any other role.   |

## Subject Security

Subject Security refers to a collection of information that is displayed in a topic frame in one or more Web parts.

For example the Billing Instructions Subject controls access to such information as the Billing Currency, Debit Note copies, Trading Terms and so on. It is displayed in the Billing Instructions topic which can be viewed in Case Details and Name Details.

Subjects are predetermined and not configurable.

The **Billing Instructions** Subject displays in the **Case Details** and **Name Details** web parts.

Granting or denying access to a subject determines whether the user can view the information. For example, if access is denied to the Billing Instructions Subject the user will be unable to view the Billing Instruction topic from any web part in Workbenches.

## Appendix B: WAM – Client WorkBench Conversion

The **Client WorkBench** is designed to replace the **Web Access Module** (WAM). Listed below are things to consider when performing the conversion from the **Web Access Module** to the **Client WorkBench**.

### Redundant Web Access Site Controls

The following are **Web Access Module** site controls that are no longer used:

- Client PublishAction – this site control is replaced with the ability to specify a Client Importance Level for each Event using the Client Importance site control.  
Therefore, during the conversion process any Events that are *not* attached to the Action specified via the Client PublishAction site control are assigned to the lowest Client Importance Level.  
The Client Importance site control then needs to be set to a level that ensures these Events *are* excluded.
- Client May View Debt – this site control is replaced by information security.

### Published Data

Any information defined regarding data to be published via the **Web Access Module** is now *automatically* carried through into the Client WorkBench. With regard to:

- **EVENTS:**  
See the Client PublishAction site control information above.
- **CASE TYPES:**  
The Client Case Types site control used in the **Web Access Module** to identify the type of cases that client users can access is *also* used in the **Client WorkBench**.
- **NAME TYPES:**  
The Client Name Types site control used in the **Web Access Module** to identify the Name Types that can be accessed by client users is *also* used in the **Client WorkBench**. This site control has been modified to identify the Name Type relationships the client name must have to gain access to the case.  
The new Client Name Types Shown site control identifies Name Types that can be displayed to client users for any given case.
- **USERS:**  
A conversion is provided to create an Access Account for each of the external users of the **Web Access Module**. It is necessary to create the individual users against that account.  
The conversion script (Convert External WAM Users) can be found in your CPA Inprotech database installation directory under: DBSetup\Scripts\Utilities.

## Appendix C: CPA Inprotech Site Controls

The following site controls are used to configure the WorkBench. These site controls are accessed via the **Site Control** in CPA Inprotech.



To ensure changes to site control values are effective immediately either refresh the browser window or log out of and back into WorkBenches.



Indicates the site control is used by **CPA Inprotech**.






### All WorkBench Modules

|  | SITE CONTROL                 | FUNCTION  |
|--|------------------------------|---|
|  | Address Style <culture>      | Determines the address style to use for all addresses translated into the specified culture.  |
|  | Case Search on Any Action    | Determines the actions to be searched when using the Next Renewal Date as part of the search criteria.  |
|  | Date Style                   | Determines the format to use when presenting dates.   |
|  | Export Limit                 | Contains the maximum number of result rows that can be exported via WorkBenches. If not provided or set to 0 no limit is enforced (not recommended). Default value = 1000.  |
|  | GENERATENAMECODE             | Determines whether a name code is automatically generated for names created in WorkBenches.   |
|  | Max Invalid Logins           | Determines via the <i>Integer</i> field how many logons a user can attempt before they are locked out of their account and can no longer the WorkBench module.  |
|  | Name search with both keys   | Identifies the type of name search to be performed.   |
|  | Name Variant                 | Controls the display of name variants in WorkBenches.   |
|  | Policing Removes Reminders   | Controls the automatic purging of reminders.  |
|  | Related Case Sort Order      | Contains the initial sort order for cases displayed in the Related Case list.   |
|  | Renewal Fee                  | Contains the default Charge Type; and is linked to the following other Related site controls:<br>- Main Renewal Action<br>- Lapse Event<br>- TAXREQUIRED  |
|  | Renewal Search on Any Action | Determines the actions to be used in a case search when Next Renewal Date is selected.  |
|  | Welcome Message – Global     | Identifies the name text to be displayed as a message to both internal and external users.  |
|  | WorkBench Attachments        | Controls the display of attachments in WorkBenches.<br><ul style="list-style-type: none"> <li>Professional users have access to Case and Name attachments</li> <li>Marketing users have access to Name attachments</li> <li>Client users can view Case attachments they have been given access to.</li> </ul> |







# Internal WorkBench Modules

## General















|   | SITE CONTROL                   | FUNCTION  |
|---|--------------------------------|---|
|  | CPA Date-Start                 | Contains the Event Number of the Event used to obtain the date that CPA are to start paying renewals.   |
|  | CPA Date-Stop                  | Contains the Event Number of the Event used to obtain the date that CPA are to stop paying renewals.  |
|   | Critical Dates – Internal      | Identifies the Action containing the Critical Events to be shown, in the Critical Dates frame, to internal users.   |
|  | Critical Level                 | Identifies the Events to be flagged as <i>critical</i> in the What's Due Calendar and the reminders to be identified with a Priority of high when added to Microsoft Outlook. |
|  | Events Displayed               | Identifies the default Importance Level when filtering Events to be displayed.  |
|  | MAXLOCATIONS                   | Controls the maximum number of File Locations stored against a case. Once this number is reached, the oldest location is deleted each time a newer location is added.         |
|   | Product Support Email          | Contains CPA Inprotech Support's e-mail address, used to send e-mails from an Administrator to users warning them their use of certain modules is about to expire.            |
|   | Reminder Reply Email           | Holds the centralised e-mail address for mails sent from the <b>To Do</b> tab.  |
|   | Telecom Type – Home Page       | Contains the code for the Telecommunications Type that represents the Web Home Page.  |
|   | Time out internal users        | Enables / disables the Automatic Timeout functionality for all internal users, i.e. the current WorkBench session will be closed if idle for too long.                        |
|   | Welcome Message – Internal     | Identifies the name text to display as a message to internal users.   |
|   | CASEDETAILFLAG                 | Validates of a second item of information held against a case (the instructor or official number).  |
|   | Exclude Case Status From Copy  | Controls whether the Case Status can be copied when copying Cases.  |
|   | Workbench Max Image Size       | Determines the maximum size of an image attached to a Case.   |
|   | KEEPSPECIHISTORY               | Controls whether a historical record is to be kept of the changes to any Case Text or Class Text row.   |
|   | Instructions Tab to NonClients | Controls whether the Instructions tab in the Names program is available to names of the non-client entity type.   |





## Cases

|  | SITE CONTROL | FUNCTION |
|--|--------------|----------|
|--|--------------|----------|





|   |                              |   |
|---|------------------------------|---|
|  | Additional Internal Staff    | May contain an additional staff Name Type code other than Responsible Staff Member and Signatory. When entered the additional staff member name type is displayed on the Names topic of Case Maintenance. |
|  | Case Events Default Sorting  | Controls the order in which case events are displayed.  |
|  | Case Screen Default Program  | Contains the Case program name that is used to retrieve the screen control rules set up in Control in CPA Inprotech. For example, which name types are valid for a case, which action to open and so on.  |
|  | LANGUAGE                     | Contains the default language of the host organisation. If this site control is not set, the default is English.  |
|   | Relationship - Document Case | Contains the code to be used when associating Property cases with a 'Document' Case, i.e. special Power of Attorney documents.  |
|   | USPTO Private PAIR Enabled   | Enables the link to access the USPTO Private PAIR site.   |

## Time & Billing

|   | SITE CONTROL              | FUNCTION   |
|---|---------------------------|--|
|    | Automatic WIP Entity      | Determines whether WIP is automatically created against the main Entity of the firm or if the user must supply the required Entity.                                      |
|    | CASEONLY_TIME             | Prevents timesheet entries being posted that only contain a name reference. These entries are displayed in red.  |
|  | Discount Narrative        | Contains the Code of the Narrative used on any Discount WIP Items created when the <u>Discount WIP Code</u> site control is not set.                                     |
|  | Discount Renewal WIP Code | Contains the WIP Code to be used on any Discount WIP Items created for renewal WIP.  |
|  | Discount WIP Code         | Contains the WIP Code to be used on any Discount WIP Items created for non-renewal WIP.  |
|  | DiscountNotInBilling      | Controls the method by which discounts are created.  |
|  | Discounts                 | Controls the availability of the Discounts window Names and the calculation of Discounts in WIP.   |
|  | Hist Exch for Open Period | Indicates how the Exchange Rate should be selected when recording WIP.   |
|  | Narrative Read Only       | Controls the editing of narrative text.  |
|  | Narrative Translate       | Determines the language in which a narrative is displayed.   |
|  | Prepayment Warn Over      | Controls whether a warning is displayed if the balance of WIP entered for the Case and/or Debtor exceeds the balance of prepayments recorded for the Case and/or Debtor. |
|  | Product Recorded on WIP   | Indicates if the Product is mandatory when entering time.  |
|  | Restrict On WIP           | Controls the use of bad debtor restrictions within Timesheet & WIP.  |
|  | Round Up                  | Indicates if the rounding up function is used in <b>Timesheet</b> .  |

|   |                            |  |
|---|----------------------------|--|
|  | Sell Rate Only for New WIP | Indicates that the Sell Rate of the currency (rather than the Buy Rate) will always be used as the Exchange Rate when a WIP item is entered in a foreign currency. |
|  | Standard Daily Hours       | Contains the number of hours in a working day. This value is used to calculate the % billed hours per day. If not defined WorkBenches uses a default of 8.         |
|  | Time empty for new entries | Indicates how the <i>Start Time</i> field is used when new time is entered.  |
|   | Time Post Batch Size       | Indicates the number of time entries to be posted in a batch.  |
|  | Units Per Hour             | Contains the number of time units per hour used when calculating the value of WIP. If not defined, a default value of 10 is used.                                  |

## Accounting Financial

|   | SITE CONTROL         | FUNCTION   |
|---|----------------------|--|
|  | CURRENCY             | Controls the default currency the host organisation uses.  |
|  | Currency Whole Units | Controls whole number entry in local currency fields. When local amounts display they do so as whole numbers with no decimal point.  |
|  | Trading Terms        | Calculates the 'Days Beyond Terms' statistic which displays on the:<br>- My Statistics web part in Professional WorkBench<br>- Sales Highlight topic in Marketing WorkBench. |
|  | GL Journal Creation  | Indicates when the Live Financial Journals are to be created.  |

## External WorkBench Modules

|  | SITE CONTROL                   | FUNCTION  |
|--|--------------------------------|---|
|  | Client Activity Categories     | Limits the Activity Category codes displayed to external users.   |
|  | Client Case Types              | Identifies the Case Types to be accessed by the client users.   |
|  | Client Due Dates: Overdue Days | Limits the outstanding Due Dates displayed in the Client WorkBench.   |
|  | Client Event Text              | Controls the display of Event Text in the Client WorkBench.   |
|  | Client Importance              | Identifies the minimum client Importance Level of events to display.  |
|  | Client Exclude Dead Case Stats | Suppresses or hides the number of Dead cases in Total Case Count so only Pending and Registered cases are included.   |
|  | Client Instruction Types       | Identifies the types of Standing Instructions to display to client users. If "R" (Renewal Instruction) type is included, extra Case Summary information can be viewed. (5012) |
|  | Client Name Alias Types        | Identifies the types of Name Aliases to display to external users.  |
|  | Client Name Type Shown         | Identifies the Names Types for any given case that can be displayed to the client user.   |
|  | Client Name Types              | Identifies the Name Type relationships that a client name must have to gain access to the case.   |
|  | Client Request Case Summary    | Contains the name of the Doc Item used to retrieve the information for the Case Summary, e.g. EG_CLIENT_REQUEST_SUMMARY.  |
|  | Client Request Email Address   | Contains the central e-mail address. (If not entered set an e-mail is not produced when a client request is submitted.)   |
|  | Client Request Email Body      | Contains the name of the Doc Item used to retrieve the information for the e-mail body, e.g. EG_CLIENT_REQUEST_BODY.  |
|  | Client Request Email Subject   | Contains the name of the Doc Item used to retrieve the information for the e-mail subject line, e.g. EG_CLIENT_REQUEST_SUBJECT.   |
|  | Client Text Type               | Identifies the Text Types that can be displayed to the client user.   |
|  | Critical Dates – External      | Identifies the action containing the Critical Dates to be seen.   |
|  | Time out external users        | Enables/disables the Automatic Timeout functionality for all external users, i.e. the current WorkBench session closes if idle for too long.                                  |
|  | Welcome Message – External     | Identifies the Name Text to display to external users as a message.   |