LAW MASTER®
Law Practice Technology

# LawMaster Release Notes

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# Important Notice – Upgrade Path

Please read all release notes between your current version and the version you are installing to ensure you are aware of all changes and setup requirements between these versions and that you install and test (see suggested testing protocol at the end of this notice) in your Training database before upgrading Production.

**Supported upgrade paths for CANADA R2 Onwards**

The following are supported upgrade paths to Canada R2 and onwards:

- *If you are running Estonia R2, Sweden, or Canada*, you can upgrade directly from your current version to Canada R2.
- *If you are running a version earlier than Estonia R2:*
  - You must first upgrade through each public release to get to Estonia R2. *For example, for releases prior to Estonia R2, if there are publicly released versions A, B, and C available, you will not be able to jump from A to C. You will need to perform A to B and then B to C.*
  - Once you have stepped through each upgrade to Estonia R2, you can then upgrade directly to Canada R2.

# Summary of Changes to Security Settings

NZ Investment Income Reporting access from:
Main Menu → Accounting → Trust Accounting → Investments (41533)

# Summary of Changes to Parameters

Menubar → Parameters → Set Parameters → Records Management → Information Type (47591)

Menubar → Records Management → Processing Options → Prompt for Digital Signature (47595)

Menubar → Parameters → Set Parameters → Miscellaneous → Outlook Integration → Integrate – Email Properties-Folio Sync (50782)

Menubar → Records Management → Processing Options → Finalise all previous Version of a Document (49878)

Menubar → Parameters → Records Management → Processing Options – Auto Check-in Non-MS Office Files (49951)

Menubar → Parameters → Records Management → Processing Options – Wait time (50024)

Resource Security → UI Controls – Requisition - Anticipated Disbursements (50804)
Resource Security → UI Controls – Requisition – Bank Details (50805)

# New or Updated WP Forms

WP form TR – Requisition (50806)



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# Known Issues

The following are known issues in the current release:

- Where the user has Express Viewer for PDF turned off and the Preview pane is selected, focus is lost for up and down arrows when a PDF folio record is selected. Users will need to re-select the next folio record using the mouse to continue moving up and down with the arrow keys.
- Any of the following characters: / \ : * ? " < > | in the Templates for the Folio File Name and Attachment Options will cause an issue when using the folio record within LawMaster including Preview, Edit, Send by Email, etc. Validation will be included in the next release to ensure these characters aren't allowed for use. (Set Parameters ➔ Records management)
- Office 365 Version 1908 Build 11929.20396 has an issue with Export to PDF functionality, this issue could not be replicated on Build 11929.20436.

# Operating system requirements & supported platforms

With the introduction of Microsoft's new set of products and deployment practices, we have reviewed our support policy and will be using the following support policies as we develop future versions of our product.

These policies are based on information available on the Microsoft Support Lifecycle site which can be found at https://support.microsoft.com/en-us/lifecycle.
The purpose of publishing these policies is to ensure that clients can plan appropriately when upgrading versions of LawMaster.

## Introducing New Microsoft Products

LawMaster will aim to commence support for the latest versions of Microsoft tools and systems used with our product 12 months after Microsoft commences "Mainstream Support" for its product. The time lag after the new product's support will be dependent on the scale of impact of the changes in Microsoft's product on LawMaster. We are currently reviewing the support periods for the Microsoft product range that fall under the Modern Lifecycle Policy. We suggest you maintain products under these policies at the version we have tested against as we cannot guarantee compatibility with future versions.

## Phasing out Older Microsoft Versions

Conversely, when a Microsoft product or service moves out of "Mainstream Support" as defined by Microsoft's product life cycle, we will no longer support these versions for future releases.

Earlier versions of LawMaster running on older Microsoft products will be supported whilst the LawMaster version remains supported, although due to Microsoft's "Extended Support Phase" only providing paid support additional costs may be incurred if Microsoft support becomes necessary.



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The following table provides a summary of our support by Microsoft product, where a LawMaster Version Name is noted support will end on release of that Version. Where the end date for mainstream support is beyond our current version plans, an estimate of the likely date of release is included.

Office 365 is being renamed to **Microsoft 365**.

**PLEASE NOTE:**

- **LawMaster versions from 10.13 onward must install .NET 4.7.2 or later on the server and .NET 4.7.2 (runtime) or later on the client systems.**



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## Canada R2 Release

| Microsoft Product | Microsoft Mainstream Support End | LawMaster Support Ends (by Version Name or Estimated Date) |
|---|---|---|
| **Windows Server**<br>• LTSC (not SAC)<br>• Non IOT Editions | | |
| **2016 Server** | 11/01/2022 | April 2022 |
| **2019 Server** | 09/01/2024 | April 2024 |
| | | |
| **Microsoft SQL Server**<br>• Standard or Enterprise Edition | | |
| **2014** | 9/7/2019 | Canada R2 |
| **2016** | 13/7/2021 | November 2021 |
| **2017** | 11/10/2022 | November 2022 |
| **2019** | 07/01/2025 | April 2025 |
| | | |
| **Windows Desktop**<br>• Pro or above<br>• 64 bit | | |
| **Windows 10**<br>• Version 1903 | 08/12/2020 | December 2020 |
| **Windows 10**<br>• Version 1909 | 11/05/2021 | November 2021 |
| | | |
| **Office Installations**<br>• 32 bit<br>• Installed on PC | | |
| **Office 2016** | 13/10/2020 | Portugal |
| **Office 2019** | 10/10/2023 | November 2023 |
| **Office 365**<br>• Version 1902 | 08/09/2020 | Portugal |
| **Office 365**<br>• Version 1908 | 09/03/2021 | March 2021 |



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# Release Enhancements

| Remarks | Request No. |
|---|---|
| **Accounting General** | |
| **NZ IRD Tax Reform Changes**<br>A new module called **NZ Investment Income Reporting** has been added to Main Menu ➔ Accounting ➔ Trust Accounting ➔ Investments.<br><br>This module produces the file required for reporting investment income using the myIR File Upload service from the 1st April, 2020.<br><br>Module inputs include:<br>❖ Date From: defaults to first day of previous month<br>❖ Date To: defaults to last day of previous month<br>❖ Tax Type: options for:<br>  ○ IPS: Interest pay as you earn (default selection)<br>  ○ NRT: Non-resident withholding tax<br>❖ Original or Modification: options for<br>  ○ Original file format (default selection)<br>  ○ Amendment file format<br>❖ Contact: displays Resource List for selection of IRD Contact and defaults to the logged in user.<br><br>After selecting OK, the user is presented with two tabs:<br>1. **Certificate Details** which displays the columns required to meet the upload requirements based on Tax Type selected, including the Export Errors column, which details any issues where data does not meet mandatory requirements.<br>2. **Header Information** which displays File Header Record columns required to meet the upload requirements based on the Tax Type selected, including an Export Errors column, which details any issues where data does not meet mandatory requirements. | 41533 |



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The **Connect to Entity** context menu option is made available so that users can modify entity details if required.

Grid Menu options are the same as NZ RWT Certificate Annual Return, including Export to File.

The location of the file that is exported is the same as that used for NZ RWT and NRWT Certificate Annual Return, i.e., Parameter Type **FF**, Par Code IR15, and Par Code IR67.

As the IRD will now allow negative figures if the payer is correcting an overpayment of tax there is no validation on the Interest and RWT fields. The onus is on the payer to ensure that the error occurs in the current tax year.

## Cash Payments

### Fix: Tabbing past Entity ID field on Input Payment Voucher

51569

Corrected an issue where a user enters the Entity ID directly into the field of the same name on the Input Payment Voucher form and selects tab an Exception Error is displayed to user.

## Cash Receipts

### Update Import Receipts from ACCPAC/Masterpiece

49536

The **Import Receipts** module from ACCPAC/Masterpiece has been modified so that for each receipt record, the last nine digits will be presented, and any alpha characters removed.

For example, ABC123456789 will now be presented as receipt number 123456789 and AB1234567890 will now be presented as receipt number 234567890.

## Client and Matter Maintenance

### Fix: Conflict Check Doesn't Handle Long Entity Names

49985

Corrected an issue where Check Possible Conflicts returned an error when used on long entity names.

## Document Management

### Audit Trail logs Folio Actions

34537

Finalising or un-finalising a folio will now update the Folio Attachment Audit Report to indicate when the folio attachment status has been changed. Changes to the Finalise status will be reflected in the Audit Trail for Attachment → Field Name of 'Status'.



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Adding, modifying, or deleting a folio's information type will now update the Folio Audit Report to indicate when the folio has been changed. Changes to the information type will be reflected in the Audit Trail at Folio → Field Name of 'Information Type'.

### Fix: Creating a new Version of a Word document with a Table of Contents Causes an Error

50796

Corrected an issue where creating a new version of a Word document that contains a table of contents caused an error in the update process. A table of contents is now updated in Word in invisible mode before presenting the document to the user.

### Set Info Types to Multiple Matter Work Types

47591

When the **Information Type** Parameter (Parameters → Set Parameters → Records Management → Information Types) is set to **All** or **Matter**, the user can now assign multiple matter Work Types. The **Always Display** option will apply to all Work Types selected where a folio record is saved to a matter. Work Type is applicable to matter folios only as per existing rules.

### Remove Prompt for Digital Signature on Finalise Folio Process

47595

A new checkbox field has been added to the Records Management → Processing Options parameter under Folio Finalise called **Prompt for Digital Signature**.

When unticked, the prompt to sign the attachment is not displayed when finalising a folio.

When ticked, the existing behaviour remains, i.e., the user is prompted to sign the attachment when finalising a folio.

On upgrade to Canada R2, the **Prompt for Digital Signature** parameter will be ticked by default.

### Parameter for Auto Check-In of PDF Files

49951

A new Parameter **Auto Check-In Non-MS Office Files** has been added under Parameters → Records Management → Processing Options.

Users can enable and disable the **Auto Check-In** parameter by ticking or unticking the checkbox. A greyed-out text field is displayed to show the file types supported for auto check-in, e.g., .pdf.

On upgrade to Canada R2, the parameter will be disabled, and file type textbox will have .pdf by default.



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## Wait Time for Auto Check-In of Non-MS Office Files

50024

A **Wait Time** field has been added to the **Auto Check-In** parameter located in Parameters ➔ Records Management ➔ Processing Options.

This field will set the minimum wait time, in seconds, for which Auto Check-in will not occur following selection of edit. A minimum value of thirty and a maximum value of 300 is allowed. The default value is thirty seconds. This may need to be increased where users experience slowness when opening pdf files.

## Auto Check-In PDF Documents

47597
50951
50189

If the user's default PDF program is whitelisted and **Auto Check-In** is enabled on the **Records Management Processing Options** parameter, the file is written to the CheckOut Collection in the following instances:

- On editing a PDF document, or
- On merging a PDF document template.

The Auto Check-In program periodically (approximately every second) scans the CheckOut Collection and tries to take exclusive access of the files mentioned in the collection. If LawMaster can exclusively access a file, then the program will check-in the file and remove the file name from the Checkout Collection (subject to the wait time nominated on the Parameter).

Manual Check-In and Undo Check Out will also remove the file name from the CheckOut Collection.

If the user closes LawMaster before closing any opened PDF files, Auto Check-In will not occur.

Whitelisted PDF Applications:

- Acrobat Reader
- Acrobat Pro
- Foxit Reader
- Foxit PhantomPDF Business

Considerations:

1. If Windows crashes, auto check-in may not occur.
2. Manual Check Out does not trigger auto check-in functionality and will not add the folio to the CheckOut Collection.

## Auto Check-in for PDF is Handled if LawMaster Application is Closed

49953

On editing a PDF document, the file details are written to a CheckOut Collection if Auto Check-In is enabled on the Records Management Processing Options Parameter.



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If LawMaster closes or crashes when a PDF file has been checked out:

- If the PDF application is still running, the PDF file remains checked out and in the checkout collection. If the user re-opens LawMaster while the PDF application remains open, Auto Check-In will occur when the user closes the PDF file at which time it is removed from the checkout collection (subject to the wait time nominated on the Parameter).
- If the PDF application is not running, the PDF file remains checked out and in the checkout collection until LawMaster is re-opened, at which time auto check-in will occur on start-up and the file is removed from the checkout collection.

If the PDF application crashes when a PDF file has been checked out:

- If LawMaster is still running, PDF files will be checked in automatically (subject to the wait time nominated on the Parameter)
- If LawMaster is not running, PDF files will be checked in automatically when LawMaster is re-opened.

### PDF with Password Protection will not Auto Check-in

50625

Where a PDF document has password protection, users must manually check the PDF back in to LawMaster following closing.

### Fix: File Extensions Added to Elasticsearch Exclusion list

50813

Because certain zip file formats cause Elasticsearch to hang in some circumstances, common formats have been added to the exclusion list to prevent attempts to index them. These include:

.zip, .tar, .iso, .a, .ar, .cpio, .shar, .lbr, .mar, .sbx, bz2, .lz, .gz, .rz, .sz, .7x, .s7z, .cab, .jar.

### Fix: Cannot Access the File Error on Open Folio Viewer

50495

Corrected an issue where an error was received when selecting Open Folio Viewer on a folio that had been previously opened for edit.

### Document Properties with an XML Tag of SimpleField now Supported

50263

LawMaster now supports Custom Document Property fields using an xml tag type of **Run** or **SimpleField** to ensure **DocProperty** field values are refreshed when the Custom Document Property meta data is updated.

### Fix: Drag Drop and Modify Precis Locks File for Sending Via Email

50609

Corrected an issue where Drag-drop and Modify Precis was locking a PDF File and returning an error when sending via Email.



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### Fix: Elasticsearch not Indexing File Notes

51581

Corrected an issue where Elasticsearch was not indexing file notes entered after the Canada release and therefore were not being returned when conducting a Word in Text search in a folio enquiry.

### Blank Word instance removed when Merging a WP Form

49693

Where a user merges a WP Form the blank Word window that is opened as part of the merge process is now closed.

## Integration Services

### Fix: Start Time and End Time were Mandatory Fields Instead of Optional.

49524

Corrected an issue where Start Time and End Time were mandatory fields but should have been optional. If no Start Time is provided, the Transaction Date will now default to TODAY.

## Lawyer's Workbench

### Fix: Spell Check for Machines Set Up to Run in New Zealand

40456

Where the **00-COUNTRY** parameter is **NZL**, we have now made available the New Zealand Dictionary in all modules where Spell Check function is available.

1. If **00-Country = AU**, then dictionary is set to en-au
2. If **00-Country = NZ**, then dictionary is set to en-nz

## OutLook

### Add-in Updates Folio Information for Email Saved to LawMaster

46101
50288
50266

Custom properties can now be added to Outlook emails which will identify whether the email has already been saved to LawMaster.

The properties are available for display in columns **LM Folio No** and **LM Application Service**.

Custom properties are added to Outlook emails immediately when the user creates a LawMaster folio by the following operations:

- Drag-Drop Email: Floating File Note
- Drag-Drop Email: Precis Override
- Drag-Drop Email: Auto save
- Floating File Note Button ➔ Save ➔ Outlook Emails

Custom properties are also added to Outlook emails when the user creates a LawMaster folio by selecting **Save to Folio** from the LawMaster ribbon.



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Custom properties are added at the next sync interval to Outlook emails via the Auto-sync process or the Sync Emails button when the user creates a LawMaster folio by the following operations:

- Outlook Ribbon → New Email → Save Email to Folio
- LawMaster Ribbon → New LawMaster Email
- Reply
- Reply All
- Forward

If the Outlook parameter **Delete email after drag-drop or Floating file note** is ticked, the Custom Properties will not be displayed on the email as it is immediately moved to the Deleted Items folder on save to LawMaster.

Production application service has the priority over other installed databases of LawMaster:

- If an email is already tagged to a production folio and a user tries to save to another version, then the user property values won't be overridden.
- If an email is already tagged to a Training or Development application service and a user tries to save it to Production, then the user property values will be overridden.
- If an email is not tagged to any version, then it stores the values from the corresponding application service being saved to.

Saving .msg files from file system or from inside another email will not be supported.

## Auto-sync Emails Parameter

50782

A user can enable or disable the Email Auto-sync process of LawMaster Properties by selecting the **Email Properties-Folio Sync** checkbox from Parameters → Set Parameters → Miscellaneous → Outlook Integration → Integrate - **Email Properties-Folio Sync**.

For the **Email Properties-Folio Sync** checkbox:

- When ticked, the Auto-sync process is enabled, and when the user saves an email into LawMaster from Outlook, Folio Properties will be synchronised to the email in Outlook.
- When unticked, the Auto-sync process is disabled, and when the user saves an email into LawMaster from Outlook, the Folio Properties are not written to Outlook.

The Outlook Add-in → LawMaster Ribbon → Sync Emails option can still be used while **Email Properties-Folio Sync** is enabled or disabled.



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If **Email Properties-Folio Sync** has been enabled and is then disabled, the LawMaster Folio Properties stored in Outlook are retained but are no longer updated unless the user selects the manual Sync Emails option from the LawMaster Ribbon.

If **Email Properties-Folio Sync** is disabled then enabled, any LawMaster Folio Properties already stored in Outlook are retained but not updated unless the user selects the manual Sync Emails option from the LawMaster Ribbon for that folder and date range.

Each time Manual Sync finishes, the Auto-sync attempts to re-start. If **Email Properties-Folio Sync** is disabled, then Auto-sync will not be restarted.

On upgrade to Canada R2, the check box will be disabled.

A **Configuring Custom Email Properties Quick Start Guide** is annexed to end of the Release Notes.

## Auto-sync of LawMaster and Outlook Emails with Folios

46105
51425

When the **Email Properties-Folio Sync** checkbox is ticked, the background Outlook Auto-sync process is enabled.

It is run as a never-ending task until a cancellation is requested by either the add-in shutting down or a manual sync process. Only Inbox Items will be covered by the Auto-sync process.

Assuming the default sync time has not changed, this process runs twenty minutes after Outlook starts, will run to completion, then begin again twenty minutes after completion.

So, as an example of the process:

- Outlook starts.
- Twenty minutes later, the sync process begins.
- Your Inbox syncs. As an example, it might take three minutes.
- The process completes.
- Twenty minutes after completion, and twenty-three minutes since the last process started, the sync starts again.

The Auto-sync process will fetch all the records from the delta file stored in the Folios_Outlook_Sync table and perform the following:

1. Update the custom properties (Folio No & Application Service Name) of corresponding email(s) in Outlook.



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2. Time-stamp the process later to either the logged-in user's last sync time or the last seven days (whichever is later). This is updated on the users record in the Resources table.
3. If no records are found, then the sync process will do nothing until the next iteration.

The Custom Property update will include the following:

- If an email folio is found to be added in LawMaster, then add the property values to the corresponding email in user's mailbox.
- If an email folio is found to be deleted in LawMaster, then clear the property values from the corresponding email in user's mailbox.

The End of Day process will remove records from the Folios_Outlook_Sync table based on the following logic:

- The process relies on the Folio Sync Datetime stored against all active users in LawMaster. This datetime is updated whenever an iteration of auto sync process is completed by the Add-in.
- If all the currently-active users have performed a sync at least once, then the process will remove records that are older than the earliest folio sync date/time stored against all active users of LawMaster, or seven days, whichever is earlier. For example:
    - If User One first starts Outlook at 8am on Day Zero and works until 4pm, and User Two works from 10am to 12pm, then LawMaster's earliest sync date/time would be for User Two and all records older than User Two's date/time will be removed in the end of day process.
    - However, if a third user exists and is on leave for more than seven days, LawMaster will not record any sync date/time against that user, and therefore will ignore the sync date/time recorded against any other users. So, in the end of day process, records older than seven days will be deleted.

Considering the above, if a user is not able to check their emails for a period of time, for example, if they are on leave, then it is recommended that they manually sync their Inbox until they catch up on any un-synced items. If the leave period is longer than 30 days, then it is recommended that they manually sync in increments.

The end of day process only checks users who **do not** have a Resource Type of Z or a termination date.

If the **Compensate for online/non-cached mode** checkbox from the LawMaster ribbon in Outlook is selected, then the auto-sync process will not commence.



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We recommend users manage the size of their Inbox to ensure the auto-sync process does not interfere with the regular use of MS Outlook. Internal testing has found that the program is taking approximately 1 minute 20 seconds to process 2,000 items in the Inbox.

Notes for IT Admin team:

- There is a change in the **user.config** file of the LawMaster Outlook Add-In to indicate the default Auto-sync time period. If you wish to change the Auto-sync time for testing purposes, please advise LawMaster and we will provide you with a copy of the XML.
- Outlook Add-in log files are now generated via date, go back ten days, and are found at:
  C:\Users\[username]\AppData\Local|Temp\OutlookLogging
- .pst files will not be synced by Auto-sync process.

## Sync Button to Initiate Mailbox Folder Sync

46107
51424

Users have the option to manually sync/re-sync emails within selected Outlook folders with LawMaster folios.

A **Sync Emails** button has been provided on the Outlook LawMaster ribbon menu. This module allows the user to sync emails within the selected folder (including sub-folders) for the nominated date range against LawMaster email folios that have been saved from Outlook for the selected AppService in the LawMaster Ribbon. The Date Range uses the Date Sent recorded against the email and allows the user to select a range of up to 180 days.

When a user selects OK, if enabled, the auto sync process will stop, and the sync/re-sync will commence. A Cancel Sync icon will be displayed to the user and can be selected to stop the process at any time. Once the sync has completed, the Sync Email icon will be displayed, and the auto sync process will recommence, again if enabled.

When a user selects the **Sync Emails** button, a Select Outlook Folder dialog is presented. A lookup button is provided for users to select the Outlook folder for syncing, as well as a date range selection tool. The default date range is one month. On OK, each Outlook item will be checked in LawMaster for a matching hash and if found:

- If LawMaster Properties match, then no update occurs.
- If LawMaster Properties do not match, Folio No, and AppService are updated using the following rules:
  - Production application service has priority over other installed versions of LawMaster.



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- If an email is already tagged to a Folio in Production and a matching folio is found in the selected AppService (which is not Production), then the user property values won't be overridden.
- If an email is already tagged to a folio in Training or Development and a matching folio is found in the selected AppService, then the user property values will be overridden.
- If email is not tagged to any version, then it stores value from the selected AppService if a match is found.

If duplicate emails exist in the selected LawMaster AppService, the folio number of the first email saved to LawMaster is used for sync purposes.

Email sync will only support one Production database at a time.

When a user starts the manual sync process with the **Compensate for online/non-cached mode** selected, the date range they choose can only contain 220 items or less.

### Add Logging to Outlook Add-in and Async Call to "Connect to Matter" Functionality

50071

When going to Outlook ➔ LawMaster Ribbon ➔ Connect to Matter, functionality has been changed to an async call.

Debug logs have been added to CostControl, Tasks, AddInRemotingEntryPoint, AddInEntryPoint, and Mail Inspectors.

## Records Management

### Display 00-FOLIO_VER Parameter on new Records Management Processing Options Form

49878

The **00-FOLIO_VER** parameter, **Finalise all Previous Versions of a Document**, is now displayed on Records Management ➔ Processing Options form with a checkbox.

The user can set and save the parameter from either form.

On upgrade to Canada R2:

- If **00-FOLIO_VER** parameter exists and is flagged with "Y", then the Records Management ➔ Processing Options form field **Finalise all previous versions of a document** will be set to ticked.
- If **00-FOLIO_VER** parameter does not exist or flagged with "N", then the Records Management ➔ Processing Options form field **Finalise all previous versions of a document** will be set to unticked.



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### Fix: Bulk Load of Documents Module Error

51312

Corrected an issue where the Bulk Load of Documents module was reporting "Error while copying content to a stream" and "Cannot save folio to Closed Matter".

### Fix: PDF Previewer fails to load when Express viewer for PDF is on

51154

Corrected an issue where the PDF Previewer failed to load when the Express Viewer for PDF is on. As part of this development, manual Folio Check-In now includes a refresh of the Preview Pane.

## System Administration

### Upgrade DevExpress to Version 19.2.6

49145

Dev Express has been upgraded to version 19.2.6 providing improved grid controls, grid column filters, and general performance, and reliability improvement

### Add Folios_Outlook_Sync to ZLM_Properties

50855

Folios Outlook Sync has been added as a Table in the Dictionary List for User Defined Queries.

### Support for SQL Server 2019

50513

The LM Admin module now supports deployments to a SQL Server 2019 environment. Users will need to upgrade to Canada R2 before upgrading their Server.

Note that as part of this update, the following options in the Backup/Restore menu have been removed:

- Restore DB and Log
- Restore DB to Time(point) of Failure

## Trust Accounting

### Trust Trial Balance Merge Error when run Using Input Date

50581

Corrected an issue where the **Print Trust Trial Balance** module displays an error when run using the Input Date option. The error occurs when a matter with only one transaction has a Transaction Date within the nominated date range and an Input Date outside the nominated date range.

### Display Particulars, Analysis, and Reference field in Requisition screen

50803

Where **00-COUNTRY=NZL**, the **Add/Modify Requisition** form now includes Particulars and Analysis fields in addition to the existing Reference field.

On selection of a Payee ID, the fields will be pre-filled with values stored in the equivalent field on the entity record. Users can override the Particulars, Analysis,



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and Reference field values as per the existing pattern in the **Modify Payment Voucher** form.

Particulars, Analysis, and Reference field values are applicable to all requisition types and will be saved/updated to a requisition record. Their values will be displayed in the Requisition grid to the left of the existing Reference column.

On Release of the requisition, the values in Particulars, Analysis, and Reference fields are pre-filled on the **Payment Voucher** header form and the Reference field value is saved to the Payment Voucher Allocation Reference field.

On upgrade to Canada R2, the Requisition grid will handle the additional columns if a user has saved their own Grid layout.

Where **00-COUNTRY=AUS**, the existing Reference field and behaviour is retained. Existing validation on Reference field being mandatory is retained for both **AUS** and **NZL** Country parameter.

## Bank Account details are displayed for selected Entity on Requisition screen

50805

The **Add/Modify Requisition** form now includes the following fields in the User Interface, as per the existing pattern from Entity Details ➔ Financial tab - Bank Details panel:

- Account Name
- Account No
- Branch Name
- Bank

The Bank Details panel in **Add/Modify Requisition** form will be Hidden, Read-Only, or Read/Write based on the User's Security ➔ UI Controls tab - Requisition Details - Payee Bank Details.

On selection of Payee ID, the Read-Only or Read/Write Bank Details fields will be pre-filled with values stored on the Entity record. If Bank Details fields are editable, the user can update the values and save them to the Entity record on selection of OK in the **Add/Modify Requisition** form. If values in the Bank Details fields are updated, a record is created in the Client table Audit record.

If Bank Details fields are Read Only, the user cannot make any changes to the values in the **Add/Modify Requisition** form.

If Bank Details fields are Hidden, the entire Bank Details panel is removed from view. See the existing pattern with the Entity Details ➔ Financial tab.



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Bank Details fields are applicable to all Requisition Types, i.e., Trust, General, and Investment (NZ only).

For Payment Methods B, S, or Y, validation will be based on the Account Name, Account No, and Bank fields displayed to the user on Requisition as follows:

- All fields can be left blank.
- If the Account Number is filled, it must be valid and the format and validation will be specific to the **00-Country** parameter.
- If Bank field is filled, it must be valid according to **PN** Parameter.
- If Account Name is filled, Account Number must be filled and valid.

For Payment Methods D, E, or X, validation will be based on the Account Name, Account No, and Bank fields displayed to the user on Requisition as follows:

- Account Name, Account Number, and Bank fields must be filled.
- Account Number must be valid. the format and validation will be specific to the **00-Country** parameter.
- Bank field must be valid according to the **PN** Parameter.

On Release of the Requisition, if Payment Method is D, E, or X, the Bank Details are obtained from the Payee Entity recorded against the Requisition and saved to the Payment Voucher and Trust record if applicable.

On Add/Modify Requisition, where 00-Country=AUS AND Payee ID has no ABN **AND** the Bank Account details have been modified:

1. If the user selects NO to the ABN "Do you wish to Continue" message, the Bank Account detail changes on the form will be held.
2. If the user selects YES to the ABN "Do you wish to Continue" message, the Bank Account detail changes on the form will be saved.

On Upgrade to Canada R2, the existing UI Control setting for Entity Bank Details for each user will be replicated to the Requisition Details – Payee Bank Details.

## User can select a Payment Method for a Requisition

50799

The **Add/Modify Requisition** form now includes a Payment Method field with a look up to the **PYC Payment Codes** parameter (excluding the option of **P - Already Paid**). A read only field adjacent to the Payment Method field displays the Payment Code description.

The Payment Method selection is applicable to all Requisition Types and the Payment Method code is saved and updated to the Requisition record. The Payment Method is displayed in the Requisition grid with a Code and Description. For example, **B - Cheque (bulk)**.



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On Release of the Requisition, the selected Payment Method is pre-filled on the **Payment Voucher** header form.

On upgrade to Canada R2, existing Requisitions will have a blank Payment Method Code.

## New fields in Payment Requisition are available in Grid View

30957

All Requisition Grids available from Matter Toolbar → Requisitions, Main Menu → Accounting → Trust Accounting → Trust → Review Trust and General Requisitions or Lawyers Toolbar → Requisitions icon now include the following columns:

Where **00-Country=NZL**:

- Matter sub status labelled "Sub Status"
- Payment method
- Particulars
- Analysis
- Reference
- Investment number labelled "Matter Investment No"
- Folio number labelled "Folio No"
- Selected investment balance labelled "Investment Balance"

Where **00-Country=AUS**:

- Matter sub status labelled "Sub Status"
- Payment method
- Folio number labelled "Folio No"

A context menu option labelled View Folio has been added. On selection, the user is presented with the folio in the preview pane.

On upgrade, all additional columns are displayed based on country code.

## Trust requisition can be Drawn Against Investment

50807

When **00-Country=NZL**, the **Add/Modify Trust Requisition** form now includes an **Investment radio** button and an **Investment selection** tool displaying Investment Accounts on the Matter.

Validation on the Investment selection field has been added to ensure that when the Investment radio button is selected, an Investment must also be selected.

If the **Investment radio** button is selected, the Bank will be Trust Account and Fund field will be disabled.



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If the **Investment radio** button is not selected, the **Investment Account selection** will be disabled. If a user modifies their selection from Investment to Trust or General, the **Investment Account selection** is cleared out.

The Investment Account Number is stored against the Requisition table.

On **Add/Modify Requisition**, the following validation allows a user to raise a Requisition drawn on a Trust Account:

- If **Investment Account** is **NOT** selected, sufficient cleared FIRM funds must be available in Trust (existing) **OR**
- If another Protected Fund is selected, sufficient cleared funds must be available in the Protected Fund (existing) **OR**
- If **Investment Account** is selected, sufficient funds must be available in the Investment Account (no validation required on cleared FIRM funds in Trust Account).

On selection of Release or Release and Print:

- A Trust Payment Voucher is created.
- There must be sufficient funds in Trust to draw against. It is expected the Accounts Processing team will have moved funds from Investment to Trust.

If **00-Country=AUS**, the Investment radio button and Investment selection field will be hidden from the **Add/Modify Requisition** form.

## Attach a file or folio to a Requisition

50798

The Requisition form now has a **Linked File** option, which allows the user to attach a file or folio at the time a Requisition is added or modified based on the existing pattern in the **Input Payment Voucher** form.

If a folio is selected, a user can search for it on the Lookup Folio enquiry screen using the following defaults:

- Search criteria = File / Word in Text
- File number fields pre-filled with Matter Number of Requisition

If a file is selected, a user can search for the file using Choose File lookup. On selection of a file, a folio record is created against the payee entity ID and the folio number is saved to the requisition. The existing pattern of folio default values are based on saving the file to a Payment Voucher, e.g., Template = INVOICE.

If **View Folio** is selected, the folio will be presented in the Preview Pane.

On **Release** or **Release and Print** of the Requisition, the Folio number is pre-filled on the **Payment Voucher header** form.



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You can access the **Trust_Requisition_Folios** table from UDQ ➔ List Dictionary and Maintain User Defined Queries ➔ Display Tables.

## Display the Matter Sub-Status on the Add or Modify Requisition Window

50801

The Add/Modify Requisition form now displays the Sub Status of the selected Matter at the time the requisition is opened for Add or Modify. The field is a read-only display field, and applies to all Requisition types. If the Sub Status of a matter changes, the information is refreshed on the Add/Modify Requisition form at the time of display.

## Anticipated Disbursements on a Requisition can be set to Read Only or Read/Write Access

50804

The Resource Security ➔ UI Controls tab now includes a Requisition section with an **Anticipated Disbursements** field that can be set to Read Only or Read/Write. This determines whether the Anticipated Disbursement fields on the Add/Modify Requisition form will be Read-Only or Read/Write.

On selection of a Add/Modify Requisition form, the **Anticipated Disbursements** panel will be displayed according to the logged-in users Security > UI Controls including the **A/Disbursement** field and **Reduce To** field.

If **Anticipated Disbursement** fields are:

1. Set to Read/Write, they are editable and the user can update the values as per any current behaviour.
2. Set to Read Only, then the user cannot make any changes to the values in the Add/Modify Requisition form.

## WP Form TR Requisition includes Static Fields for new UI fields

50806

The following new fields within the Requisition are also available on the WP Form TR - Requisition:

- **Static Field 24:** Matter Sub-Status at time of print
- **Static Field 25:** Trust Investment Name (NZ Only)
- **Static Field 26:** Trust Investment Account Number (NZ Only)
- **Static Field 27:** Trust Investment Balance (NZ Only) - displays the balance at time of print
- **Static Field 28:** Requisition Folio No.
- **Static Field 29:** Requisition Folio Precis
- **Static Field 30:** Payment Method
- **Static Field 31:** Particulars (NZ Only)
- **Static Field 32:** Analysis (NZ Only)
- **Static Field 33:** Reference (NZ Only)



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- **Static Field 34:** Bank Account Name – extracted from Payee Entity ID at time of print
- **Static Field 35:** Bank Account No. – extracted from Payee Entity ID at time of print
- **Static Field 5** has been renamed Reference No. (AUS Only).

If there are no values for the new Static Fields, then blank is returned.



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# Testing

We recommend you undertake testing of the release in your training database before installing to Production. We suggest you adopt, as a minimum, the following testing protocol:

- Review the release notes and identify the items that may have an impact on your business processes;
- If you are unsure about any aspect of the release, contact Help Desk for clarification;
- Download the release and install into the training database.
- Test the requests that may have an impact on your business processes and satisfy yourself they do not have any adverse impact on your business processes;
- Inform your uses of any changes;
- Install the release to your Production Database.

# Version Control

| Version No. | Date of Release | Summary of Changes |
|---|---|---|
| 10.13.907 | 08/05/2020 | Full Client Release |
| 10.13.909 | 13/05/2020 | Outlook Auto-sync R46105<br>Input Payment Voucher R51569 |
| 10.13.918 | 21/05/2020 | Elasticsearch not Indexing File Notes R51581<br>Additional Metadata included in Outlook Debug Logs R51585<br>Correct background colour of Entity Details Phone and Email Comments |



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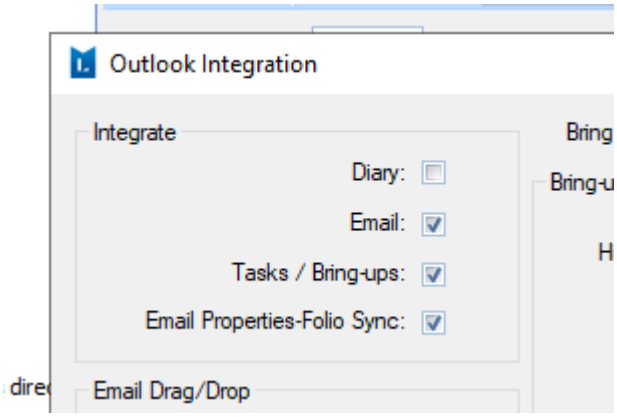
# Configuring Custom Email Properties Quick Start Guide

When activated, custom email properties can modify your Outlook emails grid to show a LawMaster folio identification number and the LawMaster server that the email is connected to. This is helpful to prevent duplicate folios or to easily check that a folio item has been added to LawMaster.

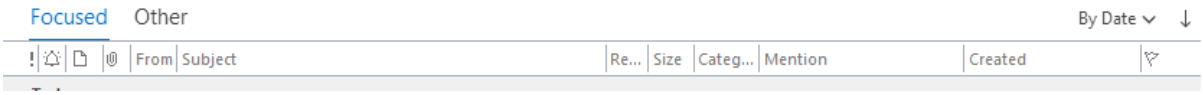
## System Administrators

1. In LawMaster, check the **Email Property-Folio Sync** checkbox:
    a. Go to Parameters -> Set Parameters -> Miscellaneous -> Outlook Integration.
    b. In the Integrate section, check the **Email Property-Folio Sync** checkbox

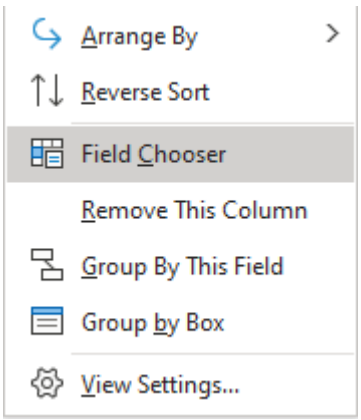



## Users

1. In Outlook, drag and drop an email from your Inbox to the Folios tab of a LawMaster matter.
2. In your Outlook Inbox, find the column header section. You may have to change your Outlook view or expand the emails window for the columns to appear:




Right-click on the column header section and select **Field Chooser**:



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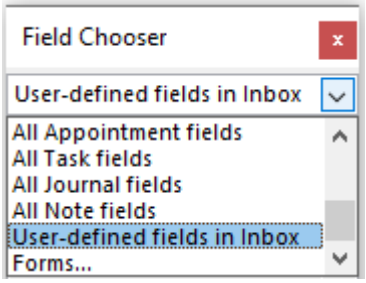
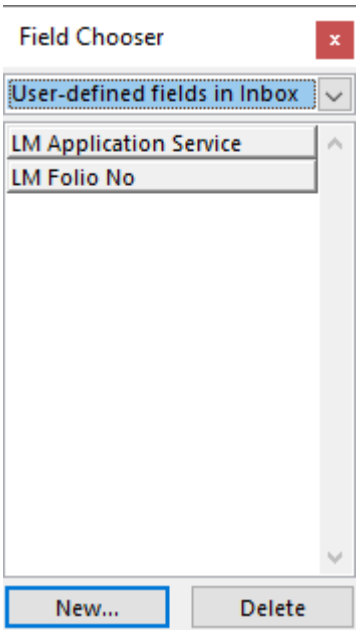
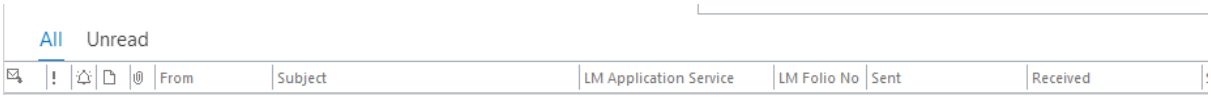
3. Choose **User-defined fields in Inbox** from the drop-down menu:



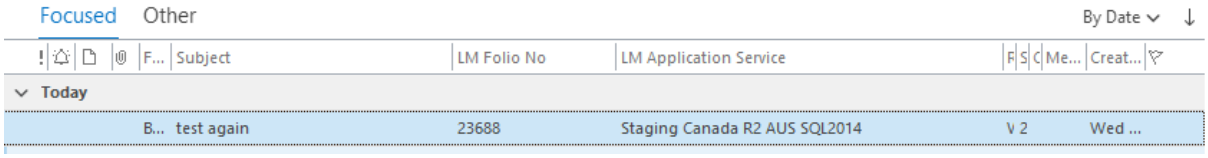

4. Drag both the **LM Application Service** and **LM Folio No** columns onto the column header section in your Outlook Inbox:




5. Your column headers will now appear in your Outlook inbox:




You may need to restart outlook for the email settings to appear:



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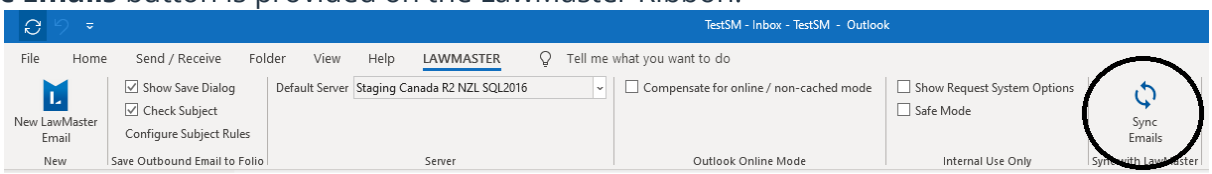
Note that while the auto-sync process runs in the background for a set period of time, a manual **Sync Emails** button is provided on the LawMaster Ribbon:




Saving any emails to LawMaster via drag and drop and the **Floating File Note** will update custom email properties immediately.

The **New Email**, **New LawMaster Email**, **Reply**, **Reply All**, and **Forward** functions require synchronisation before custom email properties will be updated.



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