LawMaster Release Notes

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Release:	Portugal

Contents

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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 Portugal Onwards

The following are supported upgrade paths to Portugal and onwards:

- *If you are running Sweden, Canada or Canada R2*, you can upgrade directly from your current version to Portugal.
- *If you are running a version earlier than Sweden:*
  - You must first upgrade through each public release to get to Sweden. *For example, for releases prior to Sweden, if there are publicly released versions A, B, and C available, you cannot upgrade directly from A to C. You need to upgrade from A to B, and then from B to C.*
  - After stepping through each upgrade to Sweden, you can then upgrade directly to Portugal.

Advanced Searching

Elasticsearch Version 7.7.1 is required for Portugal release and beyond. This is a manual upgrade process details of which are outlined in the Advanced Searching White Paper available from the Client Service Centre → Releases.

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Pre Upgrade Tasks

- If upgrading a database that is running Advanced Searching using Elasticsearch, migrate Elasticsearch Index to Version 7.7.1 following the process outlined in the Advanced Searching White Paper available from the Client Service Centre → Releases.

  For hosted clients this will be done as part of the normal upgrade service.

  If you wish to test the Elasticsearch migration on a non-Production database, please contact your Account Manager for assistance. (52210 / 52207)

Post Upgrade Tasks

- To take advantage of the fully encrypted credentials we recommend users that are logging into LawMaster with a Username and Password change their Password following the upgrade. (43097 / 52505)
- WP Forms BB, IF, FOL, MFN, MFS, and MFA are now merged using Open XML and will require upgrading to the DOCX file format prior to use. (53047 / 3622 / 53634)

Summary of Changes to Security Settings

Password strength meter, accessed from Main Menu → System Maintenance → Other (52255)

Summary of Changes to Parameters

Menubar → Parameters → Set Parameters → Miscellaneous → Outlook Integration (52090)
Menubar → Parameters → Set Parameters → Payroll → Processing Options (43104 and 43105)
Menubar → Parameters → Set Parameters → Miscellaneous → Processing Options – Password Options (43101, 52151, and 52158)

New or Updated WP Forms

WP Form BB – Matter Bill and Billing Guide (53047 and 52918)
WP Form IF – Information Type (53047 / 3622 / 53634)
WP Form FOL – Index (53047 / 3622 / 53634)
WP Form MFN, MFA, MFS – Matter File Notes (53047 / 3622 / 53634)

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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 need to re-select the next folio record using the mouse to continue moving up and down with the arrow keys.
- Office 365 Version 1908 Build 11929.20396 has an issue with Export to PDF functionality, which could not be replicated on Build 11929.20436.
- Table Fields on WP Forms BB, FOL, MFN, MFS and MFA are displaying incorrect data or the field code is not recognised if the table field is between 10 and 19 and table field 1 does not precede these fields. The issue also occurs if table fields between 20 and 29 are used and table field 2 does not precede these fields. The issue will be addressed in Portugal R2.
  Workaround - Ensure Table Field 1 is inserted in the table before Table Fields 10-19 and Table Field 2 is inserted in the table before Table Fields 20-29. The Table Field can be included using hidden text if the user does not wish the field to appear.

Operating system requirements & supported platforms

With the introduction of Microsoft's new set of products and deployment practices, we 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, https://support.microsoft.com/en-us/lifecycle.

The purpose of publishing these policies is to ensure clients can plan appropriately when upgrading versions of LawMaster.

Introducing New Microsoft Products

LawMaster aims 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 support depends 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 because 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.

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Earlier versions of LawMaster running on older Microsoft products are supported whilst the LawMaster version remains supported, but because of Microsoft's "Extended Support Phase" only providing paid support, additional costs might be incurred if Microsoft support becomes necessary.

The following table provides a summary of our support by Microsoft product. Where a LawMaster Version Name is noted, support ends 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 has been renamed to **Microsoft 365**.

IMPORTANT NOTE:

- **LawMaster versions from 10.14 onward must install .NET 4.8 or later on the server and .NET 4.8 (runtime) or later on the client systems.**

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Portugal Release

Microsoft Product	Microsoft Mainstream Support End	LawMaster Support Ends (by Version Name or Date)
Windows Server • LTSC (not SAC) • Non IOT Editions		
2016 Server	11/01/2022	April 2022
2019 Server	09/01/2024	April 2024
Microsoft SQL Server • Standard or Enterprise Edition • GDR Updates		
2016	13/7/2021	November 2021
2017	11/10/2022	November 2022
2019	07/01/2025	April 2025
Windows Desktop ❖ Pro or above ❖ 64 bit ❖ Semi-Annual Channel		
Windows 10 ❖ Version 1903	08/12/2020	Portugal
Windows 10 • Version 1909	11/05/2021	November 2021
Windows 10 • Version 2004	14/12/2021	January 2022
Office Installations • 32 bit ❖ Installed on PC ❖ Semi-Annual Enterprise Channel for Microsoft 365		
Office 2016	13/10/2020	Portugal
Office 2019	10/10/2023	November 2023
Office 365 / Microsoft 365 ❖ Version 1902	08/09/2020	Portugal
Office 365 / Microsoft 365 • Version 1908	09/03/2021	April 2021
Office 365 / Microsoft 365 • Version 2002	14/09/2021	October 2021

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Release Enhancements

Remarks	Request No.
Accounting	
Bank Details Validation text corrected on Requisitions Corrected an issue where the validation text on the Bank Details Panel of the Requisition Form was not displaying correctly when Resource Security is set to Read Only.	51493
Modify Requisition is refreshing Entity fields on tabbing Corrected an issue where the Modify Requisition Form was not holding overridden Payee Name and ABN values when using the tab key to move through the form fields.	51576
Business Intelligence	
Power BI API library upgrade To correct an issue with displaying the Dashboard from LawMaster's Business Intelligence module, upgraded Microsoft.PwerBI.API library to v3.11.1.	51740
Dashboard should display a message to the user if unable to be loaded Where a Dashboard cannot be loaded, the message "Unable to load report, please check the published URL and your permissions to access it" displays to the user. Additional error details are displayed, if available, from the Power BI API.	52007
Client and Matter Maintenance	
Matter Search by Archive No produces error Corrected an issue where Matter Search by Archive No caused an error. Where a Matter has multiple Archive numbers, the latest Archive No is displayed.	52766
New matters are updated incorrectly against the FirmCurrent table Corrected an issue where the FirmCurrent table was updated twice each time a new matter was created.	53320
Rebuild the Client Analysis Data for this Year and Last Year On upgrade to Portugal the Re-build Client Analysis Data module will be run for this year and last year.	53592

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Remarks	Request No.

Client and Matter Reporting

Top Clients Report out of balance Corrected issues where the Top Clients report, run with the 'Credit Control' checkbox: ❖ Unticked, reported the sum of Fees Billed for related entities with Influence Fees ticked on the Entity Relationship 'ER' parameter on each entity individually, resulting in double reporting. ❖ Ticked, under-reported Fees Billed where the parent entity of the Credit Control relationship was not included in the derived FirmCurrent table. In addition to the above fixes, when you run the Top Clients report in Portugal, the Queried Fees and Period Files columns display to the right of the Entity Name column, in descending order of the selection made. That is, by value or by number.	53260

Costing and Billing

Migrate WP Forms to Open XML merging To improve merging speed and support new formatting options, the following WP Forms are migrated to Open XML standard: BB, IF, FOL, MFN, MFS, and MFA. This means that from the Portugal release onwards, these WP Forms only support the .docx file type. If your WP Forms are of the .doc file type, you need to update your forms as follows. Change the: 1. Form file to .docx: Main Menu → System Maintenance → Forms → Form Enquiry → Select the form → Context Menu → Modify → Form File Name, select Unlock → Change the document type from .doc to .docx. 2. Document file type from .doc to .docx and upload the new document to Forms: Main Menu → System Maintenance → Forms → Select the form → Context Menu → Modify → Document Upload.	53047, 53622, 53634
Include formatting in Bill Clause and WP Form WP Form BB Matter Bill and Billing Guide now includes Rich Text Field R01 - Fee Narrative (formatted). To use the new formatted Fee Narrative Field, Static Field 12 on the WP Form BB needs to be replaced with Rich Text Field R01 using Forms Workbench.	52918

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Remarks	Request No.
Formatting available on Bill Clause The ability to apply formatting to a Bill Clause is now accessible by pressing F10 in the Bill Clause field or selecting the formatting context menu options from the Bill Clause field. The 'Edit Bill Clause Ribbon' allows users to apply formatting against text in the Bill Clause field using rich text control. The ribbon includes options for: ❖ Copy and paste from the Clipboard section. ❖ Font type and size, bold, italic, and underline from the Font section. ❖ Bullets, numbering, multilevel lists, indent, text alignment and line spacing from the Paragraph section. ❖ Find and replace from the Editing section. ❖ Spell check from the Proofing section. The default font in the ribbon is Arial 10 and if left unchanged, takes on the Normal Style font type of the merged document (the font size remains at 10). If the user changes the font type and size in the Rich Text Editor, the new font type and size is displayed in the merged document. The unexpanded Bill Clause window displays items in formatted view.	52951
Document Management	
Advanced Searching upgrade As part of the upgrade to Elasticsearch v7.7.1, the search logic and interfaces for index management were refactored.	52210 / 52207

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Remarks	Request No.
Convert to PDF option from folios A new Convert to PDF context menu option is available on the Folios Enquiry user interface: 1. Right-click on a folio with a supported attachment. 2. Select "Convert to PDF". 3. The Add Folio dialog displays with details pre-filled from the original folio. 4. Click Ok to save the folio as a PDF. Supported file types include: bmp, ccitt, doc, docx, gif, htm, html, jb2 (JBIG2), jp2 (JPEG2000), jpeg, jpg, msg, png, ppt, pptx, rtf, tif, tiff, txt, wmf, xls, and xlsx. The Convert to PDF option is unavailable for unsupported file types. **Note:** Because of compatibility issues, png files are converted to raw format before saving to PDF. This might cause these image files to display incorrectly, especially if included in an email.	52754
Undo Check Out message expanded When a user selects "Undo Check Out", an expanded message displays, "Undo Checkout restores the selected folio to its original version, any changes made will be lost. Do you want to continue?". The user selects Yes to undo the check out.	53102
Enhanced audit trail for folio attachments On a folio, View Audit Trail → Attachments now also displays check-in, checkout, and undo checkout actions.	53119

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<table>
<tr><th>Remarks</th><th>Request No.</th></tr>
<tr><td>Additional validation and handling added for special characters
Additional handling was included for special characters, such as / \ : * ? " < > | #, that might cause issues with Folio Viewer, merge of WP Forms, and merge of document templates.

Validation to prevent adding illegal characters was added to the following areas:

❖ Document Template - Description
❖ Folio File Name and Attachment Options
❖ WP Form - Set Template
    o Folio Templates - Folio Precis and
    o Folio Templates - Override File Name
    o Email Templates - Attachment File Name
❖ Folio Override File Name.

The validation message on selecting OK is "Invalid characters in description. You cannot use the following characters: / \ : * ? " < > | # ".

If an illegal character / \ : * ? " < > | # is included, it is stripped from the precis, file name or override file name.</td><td>52988</td></tr>
<tr><td>Additional context menu options added to Cabinet Items
The Cabinet Items context menu was expanded to include:
❖ Open Attachment (Read Only)
❖ Modify Attachment Name.

For consistency, the context menu option 'Open (Read Only)' was renamed 'Open Folio Viewer (Read Only)'.</td><td>53276</td></tr>
</table>

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Remarks	Request No.
Folio grid indicator for cabinet items A Cabinets column was added to the folios grid. The Cabinets column displays the cabinet icon if the folio record is associated with one or more cabinets. Hover over the column to display a tooltip indicating the number of cabinets the folio is associated with. For example, "Folio associated with 2 cabinets." Users can filter, group, and sort by the Cabinets column and values. On upgrade, the Cabinets column displays to the right of the Attachment column.	53400
Create folios and cabinet items by dragging and dropping files from File Explorer or Outlook onto a cabinet Users can now drag and drop files from File Explorer or Outlook onto a cabinet, which saves the files as folios and creates cabinet items.	53273
Cabinet items can be copied to a new or existing cabinet The Cabinet items context menu includes the following new options: ❖ Add to New Cabinet ❖ Add to Existing Cabinet.	53499
User can view and connect to cabinets from the Folios grid A Cabinets sub tab is added to the Folios grid that displays all cabinets associated with the selected folio. The security class of the logged in user is considered when displaying the associated cabinets. Opening the context menu for a cabinet provides the Connect to Cabinet option.	53403
Search for cabinets by folio number Users can search for cabinets by folio number on the: ❖ Cabinets screen: select Folio in the Search field ❖ Folios Enquiry screen: Context Menu → Cabinets → Add to Existing Cabinet, and then select Folio in the Search field.	53454
Item in the Cabinet Items grid to retain focus when updated or refreshed Corrected an issue where an item selected in the item grid for a cabinet lost focus after a refresh or any other update action. Now both the selected cabinet and cabinet item retain focus.	38959

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Remarks	Request No.
Duplicate folios added to cabinets are handled better Trying to add folios that already exist in a cabinet displays a message indicating the number of folios already in the cabinet and the number of folios added to the cabinet.	53519
Deleting a non-matter folio does not remove cabinet associations Corrected an issue where deleting non-matter folios associated with a cabinet caused errors. Cabinet associations are now removed correctly.	53469
Folio drag-and-drop to cabinets should update the status message After a folio drag-and-drop to a cabinet, the status bar updates to show "Folio(s) added to Cabinet ID XXX"	53777
Information Type for file note ascertained from document template When creating a file note using the FILE-NOTE workflow statement, the Information Type is now taken from the associated document template.	47329
Export Folios. Allow user to define the format of file name exported A new field, File Name Export Template, is added to the Export / Print Folios - Export to File System window, accessed from: ❖ Folio Enquiry → Export / Print Folios - Export to File System ❖ Matter Folios → Export / Print Folios - Export to File System ❖ Cabinet Items → Export / Print Folios - Export to File System The File Name Export Template field is prefilled with the filename set by the Folio File Name and Attachment Options parameter (Folio Export Template or Cabinet Item Export Template), which the user can override at the time of exporting the records. The Settings button opens the Folio File Name and Attachment Options parameter so the user can select from available variables. Validation is included to ensure special characters, such as / \ : * ? " < > | #, cannot be used. The file name generated for each file is unique and does not overwrite an existing file.	53413

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Integrated Searching

Individual user credentials used for SignIT authentication The SignIT process was changed so that the final email with completed documents is now sent to the user who initiated the process instead of the Infotrack Admin User, so the user can see immediately when signing is completed.	52517
Infotrack WebVOI Completed Report returned to LawMaster The WebVOI final report is now downloaded to LawMaster and associated with the Search Record.	53586

Outlook Integration

Hash generated on email added to LawMaster from the file system To ensure duplicate emails are not added, when a user adds .msg files to LawMaster from the file system using one of the following methods, the system generates and stores a hash of the email the folio: ❖ Folios enquiry → Add Folios → Attachments tab → Add, and then select a .msg file from the file system ❖ Floating File Note → Save - Other → File, and then select a .msg file from the file system ❖ Add-Document() statement.	50437
Include additional metadata to email auto-sync logs to help with analysis The following lines are added to the debug log: ❖ Total number of items in the Inbox folder ❖ Items processed in the Inbox folder ❖ Average time taken (in milliseconds) for the Inbox folder ❖ Total time taken (in milliseconds) for the Inbox folder.	51585
Email auto-sync now uses server date-time stamp To ensure users working in different time zones synchronise all emails created or deleted in LawMaster since the last auto-sync, LawMaster now saves the server date-time stamp against the last sync field for a resource. As a result of this change, the Outlook Add-in is not backward compatible for the purpose of email auto synchronisation. Users should not install the Outlook Add-in for Portugal until the Production database is upgraded. If you want to test the Outlook Add-in for Portugal prior to upgrading the Production database, the Email Auto - Sync with Production will not work.	51626

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A date range filter for the email auto-sync process has been included Email auto-sync now synchronises emails in the Inbox and Sent Items folders based on following logic: ❖ From all delta records in LawMaster available for the auto-sync process, the program extracts the earliest and latest email Sent Dates. ❖ The auto-sync process fetches all emails between the extracted dates and synchronises with the delta records.	51914
Include an option to auto-sync the Inbox and Sent Items folders The ability to override the Email Properties-Folio Sync parameter for individual users is provided in Portugal. The Add/Modify User window includes an Outlook Synchronisation section with the following options: ❖ Inbox only ❖ Sent Items only ❖ Inbox and Sent Items ❖ Disabled. On upgrade to Portugal, the value is set to Inbox Only for all current users if Email Properties-Folio Sync is enabled, otherwise it is set to Disabled. A current user is defined as follows: ❖ System Access includes P ❖ Date Terminated is NULL or blank ❖ Resource Type is not Z ❖ No Login field is unchecked. If Email Properties-Folio Sync Parameter is selected, the user setting behaves as follows. If: ❖ Inbox Only is selected, the auto-sync process synchronises just the Inbox folder with the LawMaster email folios. ❖ Sent Items Only is selected, the auto-sync process synchronises just the Sent Items folder with the LawMaster email folios. ❖ Inbox and Sent Items only is selected, the auto-sync process synchronises both the Inbox and Sent Items folders with the LawMaster email folios. ❖ Disabled is selected, the auto-sync process does not synchronise any Outlook folders with the LawMaster email folios.	52090

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Stop printing email custom properties The default Outlook behaviour of including email custom properties in printing is now suppressed for all emails synchronised after the Portugal release.	51987
Manual Sync Error on Date From field Corrected an issue where an error was displayed on Outlook > Sync Emails where manual sync is run in month of January.	

Payroll

Payroll Session Timeout parameters Two Session Timeout parameters are introduced to the Payroll Processing options screen to allow system administrators to set the amount of time a payroll session is inactive before LawMaster requires re-authentication. Parameters 🡺 Set Parameters 🡺 Payroll 🡺 Processing Options displays the Payroll Processing Options screen. Under Session Timeout, the: ❖ Sliding parameter specifies the time, in minutes, a payroll session can remain inactive before the session times out and requires the user to re-authenticate. ❖ Absolute parameter specifies the *total* time, in minutes, a payroll session can remain active before the session times out and requires the user to re-authenticate. The maximum value for both session timeout parameters is 480 minutes. Values are cached on login, so users must restart LawMaster, or select File 🡺 Reset Login Settings for any changes to take effect. On upgrade to the Portugal release, both values default to zero, indicating no enforced timeout.	43104 and 43105
STP Reports being duplicated Corrected an issue where the STP Report Send Job was being duplicated in certain circumstances. The system now checks to see if the submission exists before sending and after an exception.	49169

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Exceptions raised by the STP audit process are being overwritten STP Report Exceptions being raised from the stored procedure are now displayed to the user in a standard format. For example, Report Status = Sending Delayed and Status Description = [Unable to retrieve STP Payroll PayEvent data - Parameter MG-SOL for company missing]. Correct details and select Resend STP Report.	50259
Payroll Password can handle a maximum of 128 characters Amend Password (Main Menu ➔ Payroll and Personnel ➔ Administration) now allows the user to set a payroll password up to 128 characters. Following a change of payroll password, the new password limit is allowed. On upgrade, the existing minimum and maximum characters for the payroll password are accepted.	52229
STP Report calculates Lump Sum A payment incorrectly Corrected an issue where a Lump Sum A payment was being incorrectly reported in the employer header of the STP Report if the payment was made in the same pay run as a Lump Sum D.	53597

Resource Management

Simplify Author Performance Target Hours/Day calculation The calculation of the following fields in Author Performance (Lawyers Toolbar ➔ Performance) are simplified whilst taking into account Resource FTE value (Full Time Equivalent) and Budget Type of Fixed or Not Fixed. ❖ Legal Work (Hours/Day) Target MTD calculated as Chg Units per day * FTE ❖ Non-Legal (Hours/Day) Target MTD calculated as (Units per day - Chg Units per day) * FTE ❖ Legal Work (Hours/Day) Target YTD calculated as Chg Units per day * FTE ❖ Non-Legal (Hours/Day) Target YTD calculated as (Units per day - Chg Units per day) * FTE	41867

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System Administration

Improve encryption of login passwords 43097 / 52505

Post upgrade of the Client Startup to Portugal, and on first login, a new CredentialCache.dat file is created and encrypted using the logged in user's Security Identifier (SID). As part of the first login process existing credentials from the CredentialCache.json file are used so that users can log in without re-entering passwords. If 'Remember Password' is selected, these credentials are then saved to the new CredentialCache.dat file, which is drawn on for subsequent logins.

After the Outlook Add-In for Portugal is installed and the user accesses a:

- Portugal database, the Outlook Add-In draws existing credentials from the CredentialCache.json file until the new CredentialCache.dat file is created.
- CanadaR2 or Canada database, Outlook Add-In draws existing credentials from the CredentialCache.json file.
- Sweden database, the Outlook Add-In presents a blank login form for users to input their credentials.

Whilst testing the Portugal release on a non-production database, we recommend installing only PracticeManagement Client, unless the user is testing the Email Auto-Sync functionality, in which case all three client-side files need to be installed.

After users have upgraded Production to the Portugal release, we recommend that users change their password. The new password is saved and encrypted to the CredentialCache.dat file.

Correct the PostCode Lookup Link 53055

Corrected an issue where selecting Menubar → Tools → PostCode Lookup displayed a bad gateway error. The URL now correctly links to https://auspost.com.au/postcode where 00-Country=AUS.

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Improved password validation

43101

The Change Password form now shows an indicator of password strength as follows:

- Weak - Red
- Moderate - Amber
- Strong - Green

Rules for Weak, Moderate and Strong are defined as per the Password Strength Meter (Main Menu → System Maintenance → Other) and the password strength borders, set in the Parameters → Miscellaneous → Processing Options - Password Options section.

The password dictionary check now ignores case, and the new password dictionary validation message is "Common password detected. Please choose another password."

On the Change Password form, a check is added to ensure the New Password does not equal the Old Password. If equal, the message "New Password should not match Old Password. Please choose another password" displays.

All add/change password descriptions are updated as follows: "[Username]. The new password should be a minimum of [x] characters long. To make it stronger use upper and lower case letters, numbers and special characters." Where [x] is the value of the Minimum Password Length parameter.

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System administrator can define password strength borders 52151

System Administrators can now define the password strength borders for Weak/Moderate and Moderate/Strong passwords via Parameters → Miscellaneous → Processing Options - Password Options section.

The weak border cannot be:

- Zero
- Less than 25
- Greater than or equal to the strong border
- Greater than 100.

The strong border cannot be:

- Zero
- Less than 70
- Less than or equal to the weak border
- Greater than 100.

On upgrade, default borders for password strengths are set to Weak/Moderate 40% and Moderate/Strong 80%.

Changes to border conditions for password strength indicator are applied to the following locations:

- Change Password (Menubar → Security → Maintain User Security)
- Copy User → Set Password (Menubar → Security → Maintain User Security)
- Change Password (Menubar → File)
- Amend Password (Main Menu → Payroll and Personnel → Administration)
- Change Password from Practice Management Login screen (can be triggered using Password Expiry Date from Parameters → Miscellaneous).

Password Strength Meter 52255

A Password Strength Meter is added to LawMaster, found at Main Menu → System Maintenance → Other.

System Administrators can use the Password Strength Meter to assess the strength of password strings for defining Password Strength Borders. It does not test minimum or maximum password lengths, as defined within LawMaster or password dictionary compliance.

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On add/change of password, login screen populates with username only To avoid the login screen being prefilled with an old incorrect password, if a user changes a password by the following methods, then the password field in CredentialCache.dat file is set to blank. ❖ File ➔ Change Password ❖ Resources ➔ Change Password (logged in user only) ❖ Expiry of Password	52427
System administrator can define minimum password length System administrators can now define the minimum password length from Parameters ➔ Miscellaneous ➔ Processing Options - Password Options section. Minimum password length cannot be less than 5 or greater than 100 characters. On upgrade, the default minimum length is set to 5 characters.	52158
Increased character limit for Security Classes The character limit applied to Security Classes is increased to remove restrictions on the number of Security Classes that can be assigned to a resource.	53535
Entity Cleansing module produces a run time error Corrected an issue where duplicate record searches on large databases produced an error.	51709

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Grid layout can be saved for selected sub tabs 52746

The grid layout can now be saved for the following sub tabs:

- ❖ Folios Enquiry
    - o Versions tab
    - o Cabinets tab
- ❖ Cabinets ➔ Items
    - o Versions tab
- ❖ Entity Search
    - o Matters tab
    - o Attributes tab
    - o Variables tab
    - o Relates Entities tab
- ❖ Performance ➔ Details
    - o Fees
    - o Work done
    - o YTD Analysis
- ❖ The Folios sub tab grid layout is shared across the following locations:
    - o Entity Search
    - o Deeds Enquiry
    - o Subject Files
    - o Purchase Order Enquiry
    - o Library Catalogue
    - o New Client Enquiry
    - o Debtor Workbench - File Notes

The grid layout options are available from the context menu option Grid Layout with sub options of Load, Save, and Reset.

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Define default sub tab	52812 and 53726

Where multiple sub tabs are displayed in the forms detailed below, the user can now right-click on the sub tab label and select Set as Default. When this form is reloaded the selected sub tab is displayed in focus. A default sub tab can be set on the following forms:

- Deeds Enquiry
- Subject Files
- Folio Sub Tabs accessed from:
  - Folio Enquiry
  - Matter → Folios
  - Employee → Folios
  - Cabinets → Cabinet Items

The default sub tab together with the settings for Express Viewer for Word and Excel and Express Viewer for PDF are now saved to the ViewConfig.json file located in ...\Appdata\Roaming\LawMaster\PracticeManagement.

On upgrade, the Express Viewer for Word and Excel and the Express Viewer for PDF is enabled, and the Folio Enquiry sub tab is set to Precis. Settings can be distributed firm wide by making the settings for one user and then distributing the JSON file to all other users.

Upgrade DevExpress to 20.1.9	52989

Upgrade .NET to 4.8	53377

LawMaster versions from 10.14 onward must install .NET 4.8 or later on the server and .NET 4.8 (runtime) or later on the client systems.

Trust Accounting

List Trust Ledger Report issues	51813

Corrected an issue where identical trust transactions were not correctly reported in the List Trust Ledger and Print Trust Ledger by Matter reports.

Trust Statement to handle Transit Register references up to 32 characters	52072

The WP Form TS Trust Statement was returning an error when Transit Register references were greater than 24 characters. WP Form TS can now handle Transit Register references up to the field limit of 32 characters.

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NZ Investment Income now reports Joint Investors 52089

Where 00-COUNTRY=NZL, investment income is now reported to the IRD from the NZ Investment Income Reporting module using the following rules:

- Where the client is a plural entity, and a Withholding Tax Party is nominated that is one of the entities within the plural entity, the Investment Income Report reports the Withholding Tax Party as the parent investor and all other entities within the plural entity as child investors. The Withholding Tax Rate and Commission Rate is ascertained from the Withholding Tax Party with the IRD No. reported from each individual entity.
- Where the client is a plural entity, and a Withholding Tax Party is nominated that is NOT one of the entities within the plural entity the Investment Income Report reports the Withholding Tax Party as the parent investor with no other investors reported. The IRD No., Withholding Tax Rate and Commission Rate are ascertained from the Withholding Tax Party.
- Where the client is a plural entity, and a Withholding Tax Party is NOT nominated, the Investment Income Report returns an Export Error with the message "Plural Entity requires Withholding Tax Party to be nominated."

The NZ Investment Income Reporting Grid - Certificate Details tab is now grouped by Matter number and Investment Number (MIN) and then sorted by Parent Entity, Entity Name, IRD No. with Matter number and MIN included as columns in the user interface.

The NZ Investment Income Reporting module selection for Tax Type IPS is renamed from "Interest Pay as you Earn" to "Resident Withholding Tax on Interest".

The Investment Income module introduced in Canada R2 included reporting of transactions allocated to "WT1 Exempt" withholding tax code. These transactions are removed from the module, in line with the previous IR15 report.

Withholding Tax on Investment Income to be reported as a positive 52981

Withholding Tax on Resident Withholding Tax on Interest (IPS) and Non-Resident Withholding Tax (NRT) files for Investment Income Reporting now report payable amounts as a positive.

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Validation to ensure Withholding Tax Party is not a plural entity Validation is added to the following areas to ensure the Withholding Tax Party recorded against an investment is not a plural entity: ❖ Add/Modify Party (Matter Toolbar ➔ Contact) - Where Party Type = Par_Code 'WP'. A validation error on OK if selected entity is a plural entity. ❖ Add/Modify Investment (Matter Toolbar ➔ Investments). A validation error on Apply/OK if: o Withholding Tax Party is a plural entity or o Client is a plural entity and no Withholding Tax Party is nominated.	53019
Where a WP party type is added to a matter, no other party types can be added Corrected an issue where users were prevented from adding other matter party types after a WP party type was added.	53677

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Testing

We recommend you test 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 might 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 might impact your business processes and satisfy yourself they do not have any adverse impact.
- Inform your users of any changes.
- Install the release to your Production Database.

Version Control

Version No.	Date of Release	Summary of Changes
10.14.357	17/12/2020	Full Client Release
10.14.360	13/01/2021	Outlook Manual Sync - Date From – R54320 Remove Infotrack Known Issue as resolved
10.14.361	15/01/2021	Windows Authentication – R54371
10.14.361	17/03/2021	Known Issue – WP Form BB, FOL and MFN

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