



# LawMaster Release Notes

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Release: ESTONIA R2

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## Important Notice

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 Estonia R2

The following are supported upgrade paths to Estonia R2:

- ❖ *If you are running Monaco, Monaco R2 or Estonia (10.8.933 or higher):* you can upgrade directly from your current version to Estonia R2.
- ❖ *If you are running a version earlier than Monaco (below 10.8.933):*
  - You must first upgrade through each public release to get to Monaco. *For example, for releases prior to Monaco, if there are publically 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 Monaco, you can then upgrade directly to Estonia R2.

**PLEASE NOTE:** Microsoft Windows Server 2008 and Microsoft SQL Server 2008 R2 are not supported on Estonia, Estonia R2 or any future releases. If you are running Windows Server 2008 or SQL 2008 R2 you must first upgrade this software to supported versions prior to upgrading to Estonia.

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## Known Issues

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The following is a list of known issues in the current release:

- ❖ There is a known issue with the LM Outlook Add-in when using Exchange 2010 or Office 365 (which uses Exchange 2010 at the back end) where the client is using Terminal Server. The issue only occurs when running Outlook in non-cached mode and you are unable to use Terminal Server in cached mode. Given Outlook 2010, 2013 does support cached mode you need to ensure there is sufficient disk space and have Office 2010, 2013 installed on the terminal server. As an alternative, the Outlook Add-in can be turned off which will allow you to email directly from the LawMaster editor until a fix is provided by LawMaster. (R21518)
- ❖ There is a known issue when outputting a grid including icons or images to "Excel 97-2003 (xls)" format, MS Excel 2010 will open the worksheet in "Protected View". This includes the issue of not being able to convert the spreadsheet to PDF format if the XLS option has been selected using the Export Grid Contents to Excel and Email option. Further information regarding "Protected View" may be accessed from the Microsoft website: <http://office.microsoft.com/en-us/excel-help/what-is-file-block-HA010355927.aspx> (R21800)

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## Operating System Requirements & Supported Platforms

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With the introduction of Microsoft's new set of products, including amongst others Windows 10, Office 2016, Windows Server 2016 and SQL Server 2016, 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 are able to 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 the product commences "Mainstream Support" by Microsoft. The time lag after the new product's support will be dependent on the scale of impact of the changes on LawMaster in the new Microsoft release.

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## 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.

The following table provides a summary of our support by Microsoft product, where a 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.

**PLEASE NOTE:** Microsoft Windows Server 2008 and Microsoft SQL Server 2008 R2 are not supported on the Estonia release. If you are running Windows Server 2008 or SQL 2008 R2 you will first need to upgrade this software to supported versions prior to upgrading to Estonia.

Microsoft Product	Microsoft Mainstream Support End	LawMaster Support Ends (by Version Name or Estimated Date)
<b>Windows Server</b>		
2012 Server – all versions	9/10/2018	November 2018
2016 Server – all versions	11/1/2022	April 2022
<b>Microsoft SQL Server</b>		
2014 – all versions	9/7/2019	November 2019
2016 – all versions	13/7/2021	August 2021
<b>Windows Desktop</b>		
Windows 8 – all versions	9/1/2018	April 2018
Windows 10 – all versions	13/10/2020	November 2020
<b>Office</b>		
Office 2013	10/4/2018	November 2018
Office 2016	13/10/2020	November 2020

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## Product Development Update

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## Integrating LawMaster with Power BI Dashboards

### **LawMaster Dashboards ([37437](#))**

LawMaster Dashboards provide a rich and interactive Business Intelligence solution by connecting industry leading tools with your LawMaster Practice Management data.

Integrating with Microsoft Power BI, LawMaster Dashboards allow you to build rich and interactive Dashboards and Reports connected in real-time to your LawMaster data, and embed these into the LawMaster Application.

Each user accessing the Dashboards will need to be licensed for Microsoft Power BI.

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## Release Enhancements

Remarks	Request No.
<h3>Document Management</h3>	
<p><b>Send To SignIT</b></p> <p>LawMaster now supports the SignIT feature that enables secure document signing by multiple parties using digital signatures. The SignIT feature facilitates faster execution of contracts and other documents, avoiding the hassle of printing, scanning and posting the documents.</p> <p>To be able to access this feature, the user must fulfil the following requirements:</p> <ul style="list-style-type: none"> <li>❖ The firm/user must have InfoTrack login details. This can be set at individual level in Security → Maintain User Security → Select User → Search Logins tab → InfoTrack logins.</li> <li>❖ The user has security access to the Searches menu items.</li> <li>❖ Users must have Amendment or Deletion rights to File Class L – Folios to access the SignIT option from the context menu.</li> <li>❖ The SignIT disbursement codes (DC) must be setup in the InfoTrack Search Provider (SPR) parameter.</li> </ul> <p>You can access the 'SignIT' option from the context menu of a Matter Folio. This feature supports PDF and Word (.docx) documents only.</p> <p>This option is not available on a Closed Matter or on a Folio that is not attached to a Matter within LawMaster.</p> <p>Feature Highlights:</p> <ul style="list-style-type: none"> <li>❖ When the user selects SignIT → Send to SignIT option, the user is then authenticated to InfoTrack.</li> <li>❖ This is accessed from Matter → Folio Enquiry or Menubar → Enquiries → Folio Enquiry</li> <li>❖ The selected Folio is uploaded and the InfoTrack SignIT interface is displayed for the user to confirm transaction details.</li> <li>❖ The InfoTrack SignIT interface allows the user to drag and drop tags to where signatures are required in the document for individual or multiple signers.</li> <li>❖ The user then enters the name and email for each of the signing parties and selects 'request Signatures' in the SignIT interface. The parties will then receive an email with a link to view and sign the document. The user will be notified via</li> </ul>	<p><b>37061</b></p>

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email when all the parties in question have signed the document.

- ❖ A new 'Signature' column has been added to the Folio Enquiries grid to indicate the SignIT document status of 'Sent', 'Signed' or 'Declined'.
- ❖ When a Folio is sent for signature, it is immediately set to 'Finalised' so that no further changes can be made.
- ❖ A SignIT record is also created under the 'Searches' tab on Matter Folios with Provider Reference details and connection to the original folio uploaded to SignIT.
- ❖ Status and Status Details can be viewed from the 'Searches' tab on Matter Folios.

Folios-Signature	Searches Status	Status Details
Sent	To Be Confirmed	To Be Confirmed
Sent	Sent To	Contract sent to authorised parties for signatures.
Signed	Complete	The order completed successfully.
Declined	Declined	One or more authorised parties have declined to sign. Open URL for further details.

Once the document is fully signed, the Folio Signature is set to 'Signed' and the Searches Status is set to 'Complete'. A Folio record is created for the Completed Document and the Precis is appended with '- Completed Document - SIGNED'. A Folio record is also created for the Certificate and the Precis is appended with '- Certificate - SIGNED'. Both the Completed Document and the Certificate are emailed to all Signers.

If a Signer declines to sign, the user can manually set the Status to 'Declined' via the SignIT Context Menu on Matter Folios. In this case, the user can cancel Finalise, modify the document and send it again to SignIT for signature.

The cost is per document and is passed on to the matter through the InfoTrack integration. The Search Providers (SPR) parameter has additional SignIT Disbursement Codes for GST applicable and GST exempt as defined in the Disbursement Code parameter type 'DC'.

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## Increase Folio Reference Number Field Length

40638

### Add/Modify Folio Form

- ❖ Folio Reference No. field has been increased to allow up to 256 characters to be entered.
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## Folio Enquiry Hotfix 41711

NOTE: This hotfix is ONLY intended for the users who have upgraded their LawMaster database to the release version **10.11.630** – Estonia R2.

Corrected an issue where a user was unable to access the Folio Enquiry context menu from a folio record with no attachment.

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## Costing and Billing

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### Cost Transaction Statements – Exclude Matters with No Activity 38366

Corrected an issue where an error occurred when producing Cost Transaction Statements for matters from the Matter Search screen where the selection included matters without transactions in the specified date range and the 'Exclude matters with no activity in date range?' tick box was checked.

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## Deeds

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### Deed Packet Number Sequence 38850

Corrected an issue where the Deed Packet number sequence was incrementing even when the user cancelled the Add Deed form from the Entity Search screen.

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## New Client Enquiry

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### New Client Enquiry Status 38783

The NCEStatus variable now supports assigning a value to update the New Client Enquiry Status. The NCE Status value will only be assigned where that value is available from the NC parameter. If a user attempts to assign a NCE status value that is not setup within this parameter, an error message will be displayed.

#### New Client Enquiry Integration Services

The following fields have been added to Integration Services:

1. Sex
  2. Referral Type - e.g. Internal, External or Campaign
  3. Referral Source - e.g Internal 'Resource - ADE', External 'Entity Id - SM000230M', Campaign GD - Golf Day
  4. Referral Remarks
  5. Estimated Fees
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## Other

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### Integration Services - SQL Connection Leak 40785

Corrected SQL connection leak for each login attempt (to application server and integration services).

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### Search Provider Reference No. 38292

Corrected an issue where the Search Provider Reference No. was saved to the Override File Name field of the Search Folio record. The user can still access this information from the Folio Reference No. field.

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## User Defined Queries

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### Power BI Authentication Issue 40160

Corrected issue where the users were unable to authenticate to Microsoft Power BI from within LawMaster.

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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 users of any changes;
- ❖ Install the release to your Production Database.

## Version Control

Version No.	Date of Release	Summary of Changes
10.11.385	30/11/2017	Public Release of Estonia
10.11.389	22/12/2017	Improvements to Word In Text search performance when Elasticsearch is disabled.
10.11.391	24/01/2018	Improvements made in the following areas: <ul style="list-style-type: none"> <li>❖ Authentication to Microsoft Power BI from within LawMaster</li> <li>❖ Deed packet number sequence</li> <li>❖ Cost Transaction Statements from Matter Search</li> <li>❖ New Client Enquiry status and Integration Services</li> </ul>
10.11.396	5/03/2018	Fixed SQL connection leak upon each login attempt.
10.11.630	10/04/2018	Fixed the document search issue in Estonia R2.
10.11.630	10/04/2018	Release of Estonia R2.
10.11.632	4/05/2018	Hotfix to correct the issue with accessing the Folio Enquiry context menu ( <a href="#">R41711</a> ).