

Portugal R2 Quick Reference Guide

This Quick Reference Guide includes a summary of enhancements and a checklist of the tasks to be completed pre and post your upgrade to Portugal R2. Complete the Pre-Upgrade Tasks first, perform the upgrade to Portugal R2 and then complete the Post-Upgrade Tasks to ensure your firm receives full benefit from the new enhancements and features listed below.

For a more detailed explanation of each step, see the [Portugal R2 Release Notes](#). If you require further assistance to set up any of these tasks, please contact the LawMaster Helpdesk through the online portal.

Pre-Upgrade Tasks

- 1 Upgrade Advanced Search

If upgrading a database version prior to **Portugal** 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.
- 2 Check-In Folios

We recommend all folios are checked-in prior to upgrading to Portugal R2. Additional logic has been added to the check-out functionality around the handling of special characters in file names that may affect the ability to check-in files that were checked-out at the time of upgrade.

Post-Upgrade Tasks

- 1 WP Form BB has a Print/Send Option of SEND-REVIEW

To use this function, update your Bill Form via Main Menu → System Maintenance → Forms → Select Form → Modify and select the Print/Send Option of SEND-REVIEW.
- 2 WP Form FOL

Review WP Form FOL to check if any formatting changes are required to existing hyperlink form fields.
- 3 SignIT Service Parameter Settings

Update the SignIT Service parameter settings via Parameters → Searches → Search Providers → Select INFOTRACK → Modify

 - a. SignIT Document Template field – to record the Template for documents returned via the SignIT service.
 - b. Disclose Date field to store Send Date – to record the date the document is sent to SignIT.

Enhancements		
1	Upgraded Performance of Exporting & Converting Folios	<input type="checkbox"/>
	We have upgraded the performance of the Cabinets and Folios → Export Folios functionality.	
2	Increased Speed of Document Merging	<input type="checkbox"/>
	Through caching Entity Attributes Variables at the time of user login, we have been able to improve the speed of document merging.	
3	Interim and Final Bills can now be sent automatically via Email	<input type="checkbox"/>
	Users now have the option to set Bill WP Forms to SEND or SEND-REVIEW which emails the bill automatically once it is set to Interim or Final.	
4	Convert multi-page TIFF files to PDF	<input type="checkbox"/>
	Multi-page TIFF files can now be converted to PDF from all areas within LawMaster that support this functionality.	
5	Hyperlink formatting on WP Forms	<input type="checkbox"/>
	Merged hyperlinks in the WP Form FOL will default to the colour set in the hyperlink Style setting.	
6	Infotrack's SignIT Service	<input type="checkbox"/>
	New Search Provider parameter options are available for the SignIT Service including Document Template and Disclosure Date field to store Send Date where the Provider is InfoTrack.	
7	InfoTrack WebVOI Service	<input type="checkbox"/>
	The LawMaster InfoTrack integration now supports the WebVOI service.	
8	New Softdocs Licence Codes available	<input type="checkbox"/>
	New Softdocs Licence Codes for Workers Compensation (SA) and Business Law (VIC) are now available	