

Portugal 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. Complete the Pre-Upgrade Tasks first, perform the upgrade to Portugal 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 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

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|--|--------------------------------|--------------------------|
| 1 | Upgrade Advanced Search | <input type="checkbox"/> |
| <p>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.</p> | | |

Post-Upgrade Tasks

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|---|--|--------------------------|
| 1 | Passwords | <input type="checkbox"/> |
| <p>Users to change password after reviewing password validation improvements</p> | | |
| 2 | Override Email Auto Sync Settings | <input type="checkbox"/> |
| <p>Override Outlook Synchronisation default settings for Emails on individual users</p> | | |
| 3 | Payroll Session Timeout | <input type="checkbox"/> |
| <p>Set the Sliding and Absolute Payroll Session Timeout parameters</p> | | |
| 4 | Update WP Forms to docx file format | <input type="checkbox"/> |
| <p>Update WP Forms BB, IF, FOL, MFN, MFS and MFA to .docx format</p> | | |
| 5 | Replace Static Field for Bill Clause Formatting | <input type="checkbox"/> |
| <p>Replace Static Field 12 with Rich Text field R01 on WP Form BB</p> | | |

| New Enhancements | | |
|------------------|---|--------------------------|
| 1 | Password Strength Meter Use the Password Strength Meter to assess the strength of password strings via Main Menu → System Maintenance → Other | <input type="checkbox"/> |
| 2 | Bill Clause Formatting The ability to apply rich text 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. | <input type="checkbox"/> |
| 3 | Folios | <input type="checkbox"/> |
| 3a | A new Convert to PDF context menu option is available on the Folios Enquiry user interface: right-click on a folio with a supported file type → select Convert to PDF → click OK on the Add Folio dialog to save the PDF as a folio. | |
| 3b | A new field called File Name Export Template has been added to the Export/Print Folios – Export to File System window, accessed from: <ul style="list-style-type: none"> • 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, which the user can override at the time of exporting the records. | |
| 3c | Where multiple sub tabs are displayed in the forms detailed below, the user can now right-click on the sub tab 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: <ul style="list-style-type: none"> • Deeds Enquiry • Subject Files • Folio Sub Tabs accessed from: <ol style="list-style-type: none"> i. Folios Enquiry ii. Matter → Folios iii. Employee → Folios iv. Cabinets → Cabinet Items | |
| 4 | Cabinets | <input type="checkbox"/> |
| 4a | A Cabinets column has been added to the Folios grid. The Cabinets column displays the cabinet icon if the folio record is associated with one or more cabinets. | |
| 4b | A Cabinets sub tab has been added to the Folios grid and displays all cabinets associated with the selected folio. | |
| 4c | Create Folio and Cabinet Items at the same time by dragging and dropping files onto a Cabinet from File Explorer or Outlook. | |
| 4d | Cabinet Items context menu includes the following new options: <ul style="list-style-type: none"> • Add to New Cabinet • Add to Existing Cabinet | |
| 4e | Search for Cabinets by folio number via Folios Enquiry → Context Menu → Cabinets → Add to Existing Cabinet – select Folio in the Search field. | |
| 4f | Duplicate folios added to Cabinet. Attempting to add folios that already exist in a Cabinet now displays a message indicating the number of folios already in the Cabinet and the number of folios added to the Cabinet. | |

Post-Upgrade Tasks Set-Up Guide

1. Passwords

Where the username and password is being used for logging into LawMaster:

- a. A Password Strength Meter has been added to the Main Menu → System Maintenance → Other. Once the meter has been made available to appropriate users from Maintain User Security it can be used to assess the strength of password strings.
- b. Define the password strength borders for Weak/Moderate and Moderate/Strong passwords via Parameters → Miscellaneous → Processing Options – Password Options section.
- c. Define the minimum password length via Parameters → Miscellaneous → Processing Options – Password Options section.
- d. Arrange for users to modify existing password.

2. Override Email Auto Sync Settings

If the Email Properties-Folio Sync is enabled via Parameters → Miscellaneous → Outlook Integration:

- a. Set Outlook synchronisation for individual users via MenuBar → Security → Maintain User Security → Select User → Modify User. The Add/Modify User window includes an Outlook Synchronisation Email section with the following options: Inbox only, Sent Items only, Inbox and Sent Items, Disabled.

3. Payroll Session Timeout

Set the Payroll Session Timeout parameters via Parameters → Set Parameters → Payroll Processing Options – Session Timeout.

- a. 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.
- b. 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.

4. Update WP Forms to docx file format

The following WP forms have been migrated to Open XML standard: BB, IF, FOL, MFN, MFS and MFA, and therefore only support the docx file type. If your WP Forms are of the doc file type, you need to update your forms as follows:

- a. Change the 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.
- b. Change the Document file type from .doc to .docx and upload the new document to Forms via Main Menu → System Maintenance → Forms → Select the form → Context Menu → Modify → Document Upload.

5. Replace Static Field for Bill Clause Formatting

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 need to be replaced with Rich Text Field R01 using the Forms Workbench → Insert option.