LawMaster Release Notes

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Release: SWEDEN

Contents

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 SWEDEN Onwards

The following are supported upgrade paths to Sweden and onwards:

- *If you are running Monaco, Monaco R2, Estonia or Estonia R2 (10.8.933 or higher)*: you can upgrade directly from your current version to Sweden.

- *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 Sweden.

PLEASE NOTE: Microsoft Windows Server 2008 and Microsoft SQL Server 2008 R2 are not supported on Estonia, Estonia R2, Sweden 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 Sweden.

Tasks to be done as Part of Upgrade process

Pre-Upgrade Tasks

Databases need to be running over an HTTPS (SSL) Environment for Payroll

All Companies using LawMaster on their OWN servers (Not Hosted by LawMaster, as those who are hosted by LawMaster are already running over HTTPS) need to confirm that they are using HTTPS for the Application Service connections. This is a requirement of the ATO for STP Reporting.

You can do this by opening "LawMaster Administration" on your LawMaster Server.
Open the "Application Service" Screen, and select each of your Databases.
Confirm that the Connection Type = HTTPS(SSL)
If it doesn't or you need help checking this, then please contact us by raising a request at https://helpdesk.lawmaster.com.au

Post-Upgrade Tasks

Email Messages with Attachment icon

This task applies to clients hosting their own DMS with more than one DMS instance.

To support *Folio views, Email messages with attachments will now have an e-mail icon with paper clip on it* (42526 \ DEV-538), an upgrade script is required to be run across each LawMaster DMS. This upgrade will happen automatically for the MAIN DMS.

For deployments with multiple DMS instances, users will have to manually update the Folio icons by logging into the respective DMS (other than MAIN). For example, If there is a DMS with code TST2 then:

1. Login to the DMS website for TST2 with admin credentials.
2. Go to Menu Admin → Update Mail Folio Icons.
3. In Update Mail Folio Icons page, click on the Start button. This will update the icons.

WP Form GC Payment Summary

A new version of the WP Form GC Payment Summary has been made available from our Client Service Centre → Other Downloads → Practice Management Sample Forms. Please ensure you download this version to your Production Database prior to running Payment Summaries after you have upgrade to Sweden. (41352 \ DEV-605)

Security to be re-established for Payroll Module – Audit Payroll Transactions

Users that had access to the Payroll Processing module, 'Audit Payroll Transactions' prior to the Sweden upgrade will need to re-establish this access from Menubar → Security → Maintain User Security → select Resource / Default User ID → Programs tab - select Main Menu → Payroll and Personnel → Payroll Processing → tick Audit Payroll Transactions. (28119)

Summary of Changes to Security Settings

43030
The 'Show Payroll Logins' module is accessed from MenuBar → Security → Show Payroll Logins

28119
The 'Audit Payroll Transactions' module is accessed from Main Menu → Payroll and Personnel → Payroll Processing. Users that had access to this module prior to the Sweden upgrade will need to have their Program rights re-established.

The 'STP Report Status' module is accessed from Main Menu → Payroll and Personnel → Single Touch Payroll → STP Report Status

The 'STP Reconciliation' module is accessed from Main Menu → Payroll and Personnel → Single Touch Payroll → STP Reconciliation

The 'Submit STP Update' module is accessed from:
- Main Menu → Payroll and Personnel → Single Touch Payroll → Submit STP Update, or
- Main Menu → Payroll and Personnel → Single Touch Payroll → STP Reconciliation → Context Menu → Submit STP Update

The 'Submit EOY Finalisation Declaration to ATO' module is accessed from:
- Main Menu → Payroll and Personnel → Single Touch Payroll → Submit EOY Finalisation Declaration to ATO, or
- Main Menu → Payroll and Personnel → Single Touch Payroll → STP Reconciliation → Context Menu → Submit EOY Finalisation Declaration to ATO

Summary of Changes to Parameters

Menubar → Parameters → Set Parameters → Accounting → Trust Transfer Narrative (38245 \ DEV-227)

Menubar → Parameters → Set Parameters → Matter and Client → Document Assembly and Workflow Templates (40905 \ DEV-396)

Menubar → Parameters → Set Parameters → Matter and Client → Lawyers Workbench Options (Charge tab) (43450 \ DEV-367 43461 \ DEV-368)

Menubar → Parameters → Set Parameters → Matter and Client →Disbursement Codes (DC) (40922 \ DEV614)

Menubar → Parameters → Set Parameters → Miscellaneous → Outlook Integration (32609 \ DEV-359)

Menubar → Parameters → Set Parameters → Parameter Type = 00, Parameter Code = 2FA (42952 \ DEV-619)

Menubar → Parameters → Set Parameters → Payroll → Payroll Payment and Deduction Codes (40429 \ DEV-440)

Menubar → Parameters → Set Parameters → Payroll → Processing Options → STP Compliance tab (28119 \ DEV-321)

Menubar → Parameters → Set Parameters → Searches → Search Providers → GlobalX (44690 \ DEV-797)

Menubar → Parameters → Set Parameters → WP, Mail, Help & Printing → Custom Word Properties (35134 \ DEV-380)

Modified or New WP Forms

The following is a list of WP forms updated/added as a part of this release:

- WP Form BB – Overhead Disbursements (40922)
- WP Form BB – Gross Disbursements (42124)
- WP Form ED - Entity Details (41614)
- WP Form GC – Payment Summary (41352)

Known Issues

The following are known issues in the current release:

- 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)

Operating System Requirements & Supported Platforms

With the introduction of Microsoft's new set of products, including amongst others Windows 10, Office 2016, Windows Server 2016 and SQL Server 2017, 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.

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 Sweden 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 Sweden.

- **LawMaster versions from 10.11.9xx and onward must install .NET 4.6.1 or later on the server and .NET 4.6.1 (runtime) on the client systems.**

Microsoft Product	Microsoft Mainstream Support End	LawMaster Support Ends (by Version Name or Estimated Date)
Windows Server		
2012 Server – all versions	9/10/2018	Sweden
2016 Server – all versions	11/1/2022	April 2022
Microsoft SQL Server		
2014 – all versions	9/7/2019	November 2019
2016 – all versions	13/7/2021	August 2021
2017 – all versions	11/10/2022	December 2022
Windows Desktop		
Windows 8 – all versions	9/1/2018	Estonia R2
Windows 10 – all versions	13/10/2020	November 2020
Office		
Office 2013	10/4/2018	November 2018
Office 2016	13/10/2020	November 2020

Release Enhancements

Remarks	Request No.
Accounting General	
Inconsistent Spacing on Receipt WP Form Corrected issue with inconsistent spacing of Receipt Amount when displayed in words on REC/T WP Form.	43404 LM10-341
Entity ID and Payee values on Input Payment Vouchers Corrected an issue where Input Payment Vouchers were not retaining/refreshing Entity ID and Payee values correctly on subsequent vouchers. Where 00-COUNTRY=AUS, upon loading of a subsequent Input Payment Voucher form, the Entity Description, ABN and Payment Method will be refreshed from the Entity Record. Where 00-COUNTRY=NZL, upon loading of a subsequent Input Payment Voucher form, the Entity Description, IRD and Payment Method will be refreshed from the Entity Record, however the Particulars, Analysis and Reference fields will be set to blank.	38281 DEV-237
GST Reporting on Auto Disbursements Corrected an issue where the Auto Disbursement amount was reporting incorrectly in the Taxable column of the GST NZL Report when the Auto Disbursement function was used on matters with a GST Status of Zero-Rated. 00-COUNTRY = NZL only	40812 DEV-466
Payment Vouchers on Bank Accounts set to Not Visible Corrected an issue where the user could not raise a Voucher against a Bank Account set to Not Visible	43645 LM10-349

Review Direct Deposit Payment Details.

40427
DEV-443

Where 00-COUNTRY=NZL, Particulars, Analysis and Reference voucher details now display correctly from the Review Direct Deposit Payments module.

Client and Matter Maintenance

Entity Alias Search

29248
LM10-348

Searching for an Alias will return results consisting of both the Entity with that Alias and any Plural Entities of which that Entity is a part.

Withholding Tax Code is now independent of Taxation Country

36663
DEV-381

Where 00-COUNTRY=NZL, the user can now record a Withholding Tax Code on an Entity even if the Tax Country of NZL is not selected in the Primary Tax Details.

Where a value is stored against the Withholding Tax Code field, the calculation of Withholding Tax on Investment Interest is as follows:-

- If Tax Country 1 = NZL and IRD field is filled, then the Normal Rate is used
- If Tax Country 1 = NZL and the IRD field is blank, then the Penalty Rate is used
- If Tax Country 1 does not equal NZL, then the Penalty Rate is used

Additional Tax Details can be recorded against an Entity

41614
LM10-315

Two sets of Tax Country details can now be recorded against an entity. A new Financial tab has been added to the Entity Details form, to record taxation, banking and financial information for the Entity. A new field has also been added to record a GIIN (Global Intermediary Identification Number).

Tax details can be added from the Add/Modify Entity Details form or via the reverse merge process.

Merging into a Word/PDF Document Template

The following Database fields in the Client table can be inserted as a Party Variable into a Word/PDF Document Template for forward/reverse merging:

- Tax Country 1
- Tax Country 2
- Tax Identification No. 2
- Company No 2
- Business No 2

- GIIN

Merging into WP Form ED - Entity Details

The following Static Fields are available on WP Form ED - Entity Details:

Static Field	Description
101	GIIN
102	Tax Country 2
103	Tax Identification No. 2
104	Business No. 2
105	Company No. 2

The following Static Fields on **WP Form ED - Entity Details** were modified:

Static Field	Old Description	New Description
25	Tax File Number	Tax Identification No. 1
43	ACN	Company No. 1
44	ABN	Business No. 1
100	Country for tax purposes	Tax Country 1

Entity Verified Date and Entity Verified By now available as Merge Fields

44153
LMPD-29

The following Entity fields have been made available as Merge fields and can be inserted into a Document Template from the "Select Variable" form (Main Menu → Workflow Development → Document Variable Insertion Tool → Data Group = Party)

- Entity Verified Date (Verified Date)
- Entity Verified By (Verified By)
- Entity Verified By Full Name (Verified By Full Name)

Google Address mapping for UK addresses

40164
DEV-434

Google Address lookup now correctly maps the Suburb value for UK addresses.

Display duplicate Entity Addresses in Entity Details Tab

35702
LM10-342

Corrected an issue where, if the Mailing Address, Site Address and / or Registered Address of an Entity contained the same values, only the first address would appear in the Entity Details tab.

All Address types will now display in the Entity Details tab if a value has been recorded against that Address type.

Costing and Billing

Closing Matters and WIP Write-offs with Auto Disbursements

37409
DEV-700

Corrected an issue that occurred when an Auto Disbursement for a flat amount was enabled on a matter. When closing the matter and selecting "Write Off Unbilled Fees and Disbursements" an auto disbursement was raised and billed in error.

Activity Code, Units, Amount and Narrative of a Time Record can be Modified

43643
DEV-377

Users can now Modify the Activity Code (Expense Type), Units, Amount and Narrative of a Time Record where the Cost Transaction is Unbilled and is not Reversed, Transferred or Split.

Modification of these additional fields on the unbilled Cost Record will result in a reversal of the original transaction and a new Cost Record with updated and recalculated amounts.

A User requires the following Security access to modify Cost Records:

1. Deletion rights to File Class I - Cost Transactions OR
2. Maintenance rights to File Class I AND
    a. is the author of the transaction, OR
    b. is a delegated user of the author, OR
    c. the author reports to the user.

GST Reporting on Billed and Paid Anticipated Disbursements

43647
LM10-351

Corrected an issue where a Billed Anticipated Disbursement when subsequently Paid was not reporting GST correctly on the Payment Voucher cost record.

Non-Cash Overhead Disbursements

40922
DEV-614

An Overhead flag has been added to the Disbursement Code parameter so that users can classify selected Non-Cash Disbursements as Overheads. Once classified, users can report on Non-Cash Overhead Disbursements separately.

New Static Fields and an additional Table 11 – Non-Cash Overhead Disbursement Summary have been added to the WP Form BB – Bill to report on non-cash disbursements classified as an Overhead.

Disbursements reported as an Overhead on the WP Form BB will not be included in Tables 1, 3 and 10 and will reduce the amounts reported in existing Disbursement static fields.

Non-Cash Disbursement Overheads reported from Cost Enquiry Form
An Overhead column has been added to the Matter → Costs grid and Costing Transaction Enquiry grid.

A Disbursement – Non-Cash Overhead selection has also been made available as a Search option from:

1. Matter → Costs → Search – User Defined under Transaction Type, and
2. Main Menu → Client & Matter → Costing and Billing → Costing Transaction Enquiry under Transaction Type

Additional Disbursement fields in the WP Form BB

42124
DEV-571

A new Static Field 114 – "Gross Disbursements (exc GST) blank if zero" has been added to WP Form BB that displays nothing rather than $0.00 if there are no disbursements.

A new Static Field 115 – "Display label 'Total Disbursements' if > zero" has been added to WP Form BB that displays the words "Total disbursements" if the gross disbursements is greater than $0.00 or blank if equal to $0.00.

Print Billed Work displays Arithmetic Overflow Error

46190
DEV-958

Corrected issue where an Arithmetic Overflow Error was displayed when running the 'Print Billed Work' module if there was an extraordinarily large write off amount within the calculation.
(Main Menu → Client & Matter → Matter Costing → Accounting for Partnership Changes)

Deeds

Increase to Deed Packet Number Sequencing

44046
DEV-623

Corrected an issue where the Deed Packet Number was unable to increment the second (packet no.) and third (document no.) group of numbers once the existing padded number length was exceeded.

Deed packet and document groups no longer require padding to increment to the next number. Example 111111-999 will increment to 111111-1000 and 111120-005-999 will increment to 111120-005-1000.

Auto generated Deed Packet Number

44050
DEV-693

Corrected an issue where the auto generated Deed Packet Number displayed a Bundle Number that was already assigned.

If the next Bundle Number available from Parameter Par_Type=ZZ, Par_Code=BA has already been assigned then the Deed Packet Number displayed to the user is the next available number that has not been used.

Document Management

Folio and Version Details available in Word Documents using Custom Properties

35134
DEV-380

LawMaster Custom Properties can now be added to Word documents when the Custom Document Properties parameter is enabled. (Word, Mail, Help & Printing → Custom Document Properties).

Once enabled, the following Custom Properties are added at the time the document is created as a Folio Record in LawMaster:

1. LMFolioBasedOn eg 1133
2. LMFolioNo eg 1134
3. LMFolioVersionNo eg 1133v02
4. LMOriginalFolioNo eg 1133
5. LMVersionNo eg 2

Custom Properties are viewed in the Word document from File → Properties → Advanced Properties → Custom tab.

Use in Document Automation

Word allows the insertion of the value of a Document Property via the DocProperty field type. Like MERGEFIELD fields, Word converts these to text during the merge process. To overcome this, Custom Word Properties can be added to Document Templates in LawMaster by adding a text Placeholder in the template as follows:

1. DP_LMFolioBasedOn
2. DP_LMFolioNo
3. DP_LMFolioVersionNo
4. DP_LMOriginalFolioNo
5. DP_LMVersionNo

After the Document Template is merged and the Folio Record created, the Placeholders are replaced with the DocProperty field code and the value refreshed from the Custom Properties. This action occurs when clicking OK on the Modify Folio form.

Please note that the placeholder text replacement does not occur when using the "Test Merge" function in Workflow Development > Document Templates.

After the folio has been initially created and saved, it is also possible to manually insert any of the Document Properties within the document using the DocProperty field code (Insert → QuickParts → Field → DocProperty → LM....).

The matrix below outlines the behaviour of LawMaster Custom Word Properties based on whether properties already exist in the document and the user is:

1. Creating a Folio Record with Attachment,
2. Editing Folio Attachments, or
3. Modifying a Folio Record.

	On Creation of Folio record AND Folio Attachment	**On Edit of Folio Attachment**	**On Modification of Folio Record**
No Properties exist in Document	1. Auto Update Add Custom Properties to Document AND Refresh Values in DocProperty fields.	2. Auto Update Add Custom Properties to Document AND Refresh Values in DocProperty fields.	3. Auto Update IF creating New Version; OR IF "Folio Based On" value changes THEN Add Custom Properties to Document AND Refresh Values in DocProperty fields.
Properties exist in Document	4. Retain existing Custom Property values EXCEPT IF "Folio Based On" value changes THEN Auto Update Custom Properties AND Refresh Values in DocProperty fields	5. Check if LM Folio values = Custom Property values IF Different, Prompt User to Update Properties? IF Yes, Update Custom Properties AND Refresh Values in DocProperty fields	6. Auto Update IF creating New Version; OR IF "Folio Based On" value changes THEN Update Custom Properties in Document AND Refresh Values in DocProperty fields

Saving Cabinet Items order when sorted by Column Corrected an issue where user was unable to save the sort order of folios in the Cabinet Items grid when reordering using the Ascending/Descending function on the grid.	**40734** **DEV-490**
Cabinet Export PDF Bookmarks Date used in PDF Bookmarks from Cabinet Export is now Date of Writing \ File Date.	**43775** **DEV-699**
Cabinet Export Pagination	
Pages can now be numbered when the Index Page is placed at the end of the Combined PDF Document.	**42111** **DEV-570**
Corrected an issue where page numbers were not displaying correctly on the last pages of a Cabinet Export to PDF.	**41011** **DEV-492**
Cabinet Items Folio Attachment Icon Cabinet Folios have the same Icon to indicate the Attachment File Type as Folios Enquiry grid.	**42731** **DEV-602**
Cabinet Items Version Tab Corrected an issue where the Version tab in Cabinets was not displaying all Versions associated with the selected Folio.	**43768** **DEV-617**

Improved Cabinet Handling and Functionality

45376
LM10-384
DEV-875

Extensive work has been done on the Cabinet's engine to improve the adding, moving and removal of folios and sections within a Cabinet. Additional functionality has also been made available from the Cabinets context menu as follows:

Cabinet Folios

- 'Add' adds a folio to the cabinet, moves the folio to the end of the unnamed Section and auto-saves all changes to the cabinet.
- 'Modify' updates the folio record and auto-saves all changes to the cabinet.
- 'Remove from Cabinet' removes the folio record from the cabinet and prompts the user to save all changes to the cabinet.
- 'Move to Order No.' moves the selected folio to the nominated row.
- 'Save Order' has been separated into two new options:
  - 'Set Order as Displayed' where user has made changes to the order via the grid controls, the Order Numbering can be set to the Order as displayed in the grid.
  - 'Save Changes' enabled after user makes a change to the previously saved order or selects 'Set Order as Displayed' and saves all cabinet folio and section changes since the last save.
- 'Add to Section' minor changes made to improve functionality
- 'Move to Section' minor changes made to improve functionality. If there are no folios remaining in a Section following a move, that Section is removed from the Cabinet.
- 'Remove from Section(s)' moves the selected folio(s) to the end of the unnamed Section.

Cabinet Sections

- 'Merge Up' allows the user to merge the entire contents of a section up to the section above.
- 'Merge Down' allows the user to merge the entire contents of a section down to the section below.

As a new Cabinet View was created to support the development changes made above any previously Saved Grid layouts for Cabinets will be lost at the time of the upgrade.

Improved reliability when emailing Folio as converted PDF

43325
DEV-694

Improved reliability of emailing Folio and converting to PDF to reduce intermittent 'Access Denied' errors.

Info Type copied to New Version of a Folio

38065
LM10-335

Creating a new Version of a Folio inherits the Information Type of the original Folio.

Exception errors when exporting Folios on filtered grids

40191
LM10-336

Corrected an issue where an exception error was displayed when exporting folios from a grid with filtered results.

Email messages with attachments will now display a different icon

42526
DEV-358

In Folio views, Email messages with Attachments will now have an e-mail icon with paper clip on it.

Preview tab can be set as default view on Folio Enquiry grid

44751
DEV-729
DEV-824
DEV-959

The default view in the Folio Enquiry grid can be set to either the Precis or the Preview tab. The default view will be whatever was selected last by the User.

Improved handling of File Types within the Previewer has been implemented and messages are now displayed within the Folio Preview form where possible.

Email Management

Import Email Attachment as Separate Folio

32609
DEV-359

A user can now import email attachments as a separate folio into LawMaster. To enable this function, two new options have been added to the Outlook Integration parameter:

1. 'Import Email Attachments as Separate Folios', and
2. 'Default Save?'

On upgrade to Sweden, they will default to a setting of Unticked and Unselected.

The saving of email attachments as separate folios is only available if a single email is imported.

Where 'Import Email Attachments as Separate Folios' is checked and 'Email Drag/Drop' option is set to Floating File Note or Precis Override, when importing an email with attachments, the user will be presented with an extended dialogue box.

The following fields will be displayed for each attachment and can be overridden by the user:

- Save Attachment checkbox
- Email Attachment Precis – default Precis will be based on the 'Email Attachment Folio Precis' parameter
- Internal File No (Floating File Note only) –If the email subject contains a LawMaster File No, then the file type and file number will be pre-filled with this information. For Precis Override the file type and file number of the parent email is used.
- Information Type – Defaults to Information Type on the Document Template 'Email'.
- Override File Name.

The Attachments → 'Default Save' parameter determines whether the Save Attachment checkbox is ticked or unticked by default within the extended dialogue box. This selection is only applicable for the Floating File Note and Precis Override options on the 'Email Drag/Drop' parameter.

Where 'Import Email Attachments as separate Folios' is checked and Email Drag/Drop is set to AutoSave, the imported email and any attachments will be automatically saved as separate folio records in LawMaster. The email attachment folio records will be saved as follows: -

- Email Attachment Precis – Precis will be based on the 'Email Attachment Folio Precis' parameter
- File Type/Number – The parent email and attachments will be saved to the same file type and number.
- Information Type - Defaults to Information Type on the Document Template 'Email'.

Record Time when Saving an Inbound Email to LawMaster

43450
DEV-367

Users can now record time when saving Inbound Emails that are dragged into LawMaster or saved via the Floating File Note icon or Save to Folio option on the Outlook Add-in LawMaster Ribbon. The Cost record is created on selection of OK to save the Email as a Folio.

Floating File Note and Precis Override

Where the Email Drag/Drop Type parameter is Floating File Note or Precis Override and the Email is saved to a Matter, the Floating File Note and Precis Override forms now include a Time Details component prefilled with the Activity Code, Units and Narrative from the 'Default Inbound Email Charge' parameter if defined.

Auto Save
Where Lawyers Workbench Options 'Default Inbound Email Charge' parameter has a value in the Units field, the Email Drag/Drop Type parameter is Auto Save, and the Email is saved to a Matter, a Record Perusal Time form is presented to the user prefilled with the Activity Code, Units and Narrative if defined.

Record Time when Sending an Email from Outlook

43461
DEV-368

Users can now record time against a Matter when sending an Email from Outlook and the Email is saved to LawMaster using the 'Save Email to Folio?' dialog.

A new parameter has been added to the Lawyers Workbench Options → Charge tab called 'Default Outbound Email Charge' which allows the user to indicate whether the Time Details form will be presented to the user in the 'Save Email to Folio?' dialog and nominate a default Activity Code. On upgrade to Sweden, the default settings are:

- Record Time unticked, and
- Activity Code blank.

Add Bring-up when saving Email to LawMaster

44109
DEV-723

43558
DEV-364

An Add Bring-up checkbox will now be displayed on the following forms when saving Emails to LawMaster:

- Outbound Emails – 'Save Email to Folio?' dialog
- Inbound Emails – Precis Override and Floating File Note form.

The Bring-up Details will be pre-filled with the Folio Precis and the Delegated User and Owner will be the logged in User saving the email.

If the user has upgraded the Outlook Add-in to Sweden but is using an older version of LawMaster, the Add Bring-up prompt may appear on the 'Save Email to Folio?' dialog. If the user ticks this box but it is not compatible with the version of LawMaster being used nothing will happen.

Integration Services

Entity Variables available via Integration Services

43686
DEV-685

LawMaster Integrations Services (API) has been extended to support integration (GET, PUT, DELETE) with Entity Variable data.

Payroll

Single Touch Payroll (STP)

28119
DEV-321

STP Parameters

Menubar ➔ Parameters ➔ Set Parameters ➔ Payroll ➔ Processing Options ➔ STP Compliance tab

An STP Compliance tab has been added to the Payroll Processing Options Parameter which enables users to turn on Single Touch Payroll for a Company.

Menubar ➔ Parameters ➔ Set Parameters ➔ Payroll ➔ Processing Options ➔ STP Credentials tab

An STP Credentials tab has been added to the Payroll Processing Options parameter which enables users to set the hours for ATO Response Overdue and Sending Delayed status updates and displays the Sending Service Provider credentials. If any of the fields are missing on the Production database and STP Reporting is enabled please contact LawMaster.

Audit Payroll Transactions

The Audit Payroll Transactions module now produces an Unaudited Payroll grid so that users can view the payroll transactions prior to auditing and sending of the STP Report.

A Validation Errors and Warnings tab has been provided to ensure the data for the Employer, Employer Contact and Employee are complete and to avoid unnecessary errors from the ATO. To correct an error or warning, users can double click on the message to connect to the appropriate record.

To audit pays and submit the STP Report, if enabled, select Audit Payroll Transactions icon from the Grid toolbar or Audit Pays from the Context Menu.

Users that had program access to the Payroll Processing module 'Audit Payroll Transactions' prior to the Sweden upgrade will need to re-establish this access following the upgrade.

STP Report Status

The STP Report Status is accessed from Main Menu ➔ Payroll and Personnel ➔ Single Touch Payroll ➔ STP Report Status.

This module displays all STP Reports together with the status of the STP submission once it has been generated.

A footer grid allows users to view all responses received from the ATO for the selected STP Report including details of any errors or warnings to be attended to.

Functions available from the STP Report Status Context Menu include:-

- Resolve
- Cancel Submission
- Resend STP Report
- Send Full File Replacement
- View Audit Trail
- Copy Submission XML
- View Submission XML
- View Response XML

STP Reports Alert

On upgrade to Sweden, an STP Reports Alert is created and set to Active. The alert is triggered when an STP Report has a Status of Sending Delayed, Sending Failed, ATO Response Overdue or Further Action Required.

By default, the users that receive the alert are those resources that have Program Access to Main Menu → Payroll and Personnel → Payroll Processing → Audit Payroll Transactions AND Deletion Rights to File Class P-Payroll Data either directly or through a Default User. These resources can be updated from the Job Scheduler.

Users can only view the STP Report grid if they have entered the Payroll Password for that session, otherwise the user will be prompted to enter the password to view the grid.

STP Reconciliation

The STP Reconciliation module is accessed from Main Menu → Payroll and Personnel → Single Touch Payroll → STP Reconciliation.

This module produces an STP Reconciliation Report which displays the audited YTD payroll amounts for each employee of the selected Company and Year.

Where employees have been paid reportable allowances or deductions, the Employee column can be expanded to reveal the Allowances and Deductions tab. Where employees have been paid Employment Termination Payments (ETPs), the Employee column can be expanded to reveal the ETP tab.

All employees that have payroll transactions for the selected year are displayed by default. Grid filters are available from the column headings to customize the display, e.g. filter by selected employees.

Grid toolbar options are available to Print, Export to Excel or Save to Folio for all Employees or filtered Employees. Save to Folio icon saves the STP Reconciliation

Report to a Subject file in Excel format using the Floating File Note. The precis is pre-filled with the name of the Report and the Company and Year selected.

The grid will automatically refresh when an employee record is updated or payroll transactions are audited.

A Context Menu has been provided on the Reconciliation Report tab and includes the following options:

- Connect to Employee
- Submit STP Update → Sub Menu options of Selected Employee or All Employees
- Submit EOY Finalisation Declaration to ATO → Sub Menu options of Selected Employee or All Employees
- Reset Finalisation Indicator to False → Sub Menu options of Selected Employee or All Employees

A Validation Errors and Warnings tab has been provided to ensure the data for the Employer, Employer Contact and Employee are complete and to avoid unnecessary errors from the ATO. If errors exist, the Validation Errors tab will display when first loading the STP Reconciliation Report. If warnings exist, the Reconciliation Report tab will be displayed and the user has the option to click on the Validation Warnings tab. To correct an error or warning, users can double click on the message to connect to the appropriate record.

Submit STP Update

The 'Submit STP Update' module is accessed from:

- Main Menu → Payroll and Personnel → Single Touch Payroll → Submit STP Update, or
- Main Menu → Payroll and Personnel → Single Touch Payroll → STP Reconciliation → Context Menu → Submit STP Update

This module reports audited YTD amounts to the ATO for selected or all employee/s of the nominated company that have payroll transactions in the selected year. It includes employees that are active, inactive and terminated.

Submit EOY Finalisation Declaration to ATO

The 'Submit EOY Finalisation Declaration to ATO' module is accessed from:

- Main Menu → Payroll and Personnel → Single Touch Payroll → Submit EOY Finalisation Declaration to ATO, or
- Main Menu → Payroll and Personnel → Single Touch Payroll → STP Reconciliation → Context Menu → Submit EOY Finalisation Declaration to ATO

The Finalisation Declaration indicates that the employer has provided all information for each employee for the financial year. On selecting OK, the Finalisation Indicator is set to True and the YTD amounts are reported to the ATO for the selected or all employee/s of the nominated company that have payroll transactions in the selected year.

To reset the Finalisation Indicator to False, select Reset Finalisation Indicator to False from Main Menu → Payroll and Personnel → Single Touch Payroll → STP Reconciliation → Context Menu.

Employee Record → More tab – STP Reporting – Latest Submission

The Employee Details → More tab now includes a section labelled 'STP Reporting – Latest Submission'. Each time an Employee is included in an STP Report (Update or Pay Event) for This Year/Last Year, the Submission ID and Declaration Date/Time details are updated on the employee record.

If the user has security for STP Report Status, selecting the Submission ID will open the STP Report and display the submission details.

When the Payroll Year is rolled, the Submission ID and Declaration Date for Last Year are cleared and displayed as Last Year.

The Employee Enquiry grid also includes a new column for 'Last STP Report This Year', which displays the Declaration Date of the last STP Report.

Employee Record → More tab – STP Reporting – Finalisation Indicator Sent

The Employee Details → More tab now includes a section labelled 'STP Reporting – Finalisation Indicator Sent'. Once the Finalisation Declaration has been submitted to the ATO, the Finalisation Indicator Sent for This Year/Last Year is updated with a tick.

If the Reset Finalisation Indicator to False module is run, then the Finalisation Indicator Sent for This Year/Last Year is unticked.

When the payroll year is rolled over, the tick in the final pay indicator field for This Year is reset to unticked and the Last Year field is ticked.

Two Factor Authentication (2FA)

42952
DEV-619

In accordance with ATO Guidelines, Two Factor Authentication (2FA) is required to access Payroll. 2FA adds another layer of security, by requiring an Authentication Code as well as a Payroll Password.

00-2FA Parameter

On upgrade to Sweden, a new parameter 00-2FA is added to LawMaster and is set to off (Par_Flag = N). To turn on Two Factor Authentication at the database level, the Par_Flag will need to be set to Y.

When STP Reporting is enabled in the Payroll Processing Options parameter, if 2FA is not already set to 'Y', the user will be prompted to turn on 2FA.

Enable Two Factor Authentication for a user

After turning on Two Factor Authentication at the database level, each user requiring access to Payroll will need to be configured separately from within User Security. Please ensure the email address is correct on the Resource record before enabling 2FA.

MenuBar ➔ Security ➔ Maintain User Security ➔ Modify User ➔ Enable Two Factor Authentication

Once configured, an email is sent to the User with instructions on how to set up 2FA on a mobile or other device. The email also contains the Secret (barcode/key) which is used to generate the Authentication Code. The Secret is encrypted and stored against the Resource record.

If a new Secret is required for a User, select 'Resend Two Factor Authentication Email' from User Security. This will invalidate the previous Secret sent for that User as well as the Authentication Code generated from that Secret.

MenuBar ➔ Security ➔ Maintain User Security ➔ Modify User ➔ Resend Two Factor Authentication Email

If 2FA is no longer required for a User, select 'Remove' from User Security. This will invalidate the previous Secret sent for that User as well as the Authentication Code generated from that Secret.

MenuBar ➔ Security ➔ Maintain User Security ➔ Modify User ➔ Remove

Payroll password now prompts for Two Factor Authentication code

Where Two Factor Authentication is enabled via the 00-2FA parameter, the Payroll Password form now also prompts for the 2FA code when logging into a Payroll secured area. Successfully entering the 2FA code in combination with the Payroll password will allow the user to access Payroll areas for the current login session.

If the 2FA parameter is turned on and the user is not set to use 2FA, then an error message will be displayed asking the user to contact the System Administrator.

If the 2FA parameter is turned off, the payroll password behaviour remains unchanged.

Show Payroll Logins

43030
DEV-629

A new report called 'Show Payroll Logins' has been created and is accessed from MenuBar → Security → Show Payroll Logins.

This report shows all successful or failed login attempts using the Payroll password and the Two Factor Authentication (2FA) password. Cancelling out of the Payroll Password/2FA prompt will not cause any logging to occur.

The 'Show Payroll Logins' report returns the following information:

- Resource No
- User Name
- Login Program – Process or Area being accessed
- Login Attempt Date – Date and time of login attempt
- Login Result – Success or Failure of login attempt

Login information will be deleted after 60 days.

Payroll Payment and Deduction Code Parameter

40429
DEV-440

The Payroll Payment and Deduction Codes parameter type 'PC' has a new field of Allowance Code where Payroll Code commences with A%. Under Single Touch Payroll, all reportable allowances are required to be grouped to one of the following Allowance Codes: Car, Transport, Laundry, Meals, Travel or Other. If not a reportable allowance, then an Allowance Code of blank should be selected.

The Deduction Code 'Union Fees' has been renamed 'Fees' for correct reporting under Single Touch Payroll.

Report Allowances separately in WP Form GC Payment Summary

41352
DEV-605

Corrected an issue where more than 4 allowances were not reporting correctly on the INB Payment Summary Form.

Changes to WP Form GC:-

- Static Fields 17-24 have been made redundant
- Table 1 - Allowances added with Columns for Description and Amount

A new version of the WP Form GC Payment Summary has been made available from our Client Service Centre → Other Downloads → Practice Management Sample Forms. Please ensure you download this version to your Production Database prior to running Payment Summaries after you have upgraded to the Sweden build.

TFN Validation

40986
DEV-482

Where 00-Country=AUS, validation has been added to the Tax File Number field on the Employee Details → More tab to ensure that a valid Tax File Number or TFN Exemption Code is entered.

The following Tax File Number Exemption Codes can be saved to the Employee record: 000000000, 111111111, 333333333, 444444444 and 987654321.

Pay Date Validation

41119
DEV-493

Validation has been added to the following payroll modules to ensure that the Pay Date is within the current financial year as defined by the Payroll YBD on adding/modifying pays:

- Add Employment Termination Payment Entry,
- Add/Modify Timesheet Entry,
- Generate Timesheets,
- Import Lump Sum Payments,
- Reverse Pay and
- Generate Back Pay.

On OK, if the Pay Date is outside the current Payroll financial year the following error message will be displayed:
"The Payment Date must be within the date range of 01/07/xx and 30/06/xy." and the user is returned back to the module they were adding/modifying.

Pay From Date Validation

42381
DEV-642

Validation has been added to the Add Timesheet Header screen to prevent users leaving the Pay From date blank if the Pay To field has a value.

Employment Termination Payment Validation

41120
DEV-494

Validation has been added to the Add Employment Termination Payment form to prevent the user entering an ETP for the same Employee, ETP Code and Payment Date so that ETPs can be reported correctly to the ATO via the STP Report.

Validation has been added to the Add Employment Termination Payment form to prevent the user from entering negative values in the amount field for an ETP so that ETPs can be reported correctly to the ATO via the STP Report.

Super Journal - This Year/Last Year option

41101
DEV-484

Users can now nominate the Payroll Year against which a Super Journal will be applied against. Options include This Year and Last Year, with This Year being the default. A Validation Error is presented to user on OK if the Transaction Date is outside the relevant range.

Super Journals posted to the previous Payroll Year will be posted to the General Ledger for the Current Financial Year and Period in the database. If the user wishes to move the General Ledger Journals for super transactions to the previous financial year, this will need to be done manually.

View Payroll Year Range for This Year/Last Year

43007
DEV-627

Users can now view the Payroll Year date range alongside the Year selection of This Year/Last Year in the following modules:

- STP Reconciliation Report
- Submit STP Update
- Submit Final EOY STP Report
- Reset Final Pay Indicator to False
- Print PAYG - INB Reconciliation Report
- Print PAYG - INB Payment Summary
- Print PAYG - ETP Reconciliation Report
- Print PAYG - ETP Payment Summary
- Produce PAYG Summary File

Correction to Generate Timesheets Module

42543
DEV-599

Corrected an issue where Pay From and Pay To date values for the first pay transaction for an employee when run from the Generate Timesheets module was not consistent with the Input Timesheets module.

Validation on Rolling Payroll Year

40275
DEV-432

Where a Company has been STP Reporting in the Previous Year, validation has been added to the 'Roll Payroll Year' module to ensure Employees with payroll transactions in the Previous Year have a Final Pay Indicator set to True for that Year.

In this case, a warning message is displayed which lists the employees that have not had their Final Pay Indicator set to True. The user then has the option of cancelling the Payroll Year Roll and submitting the Final Pay Indicator Declaration for the listed Employees, or continuing on.

Search Provider Integration

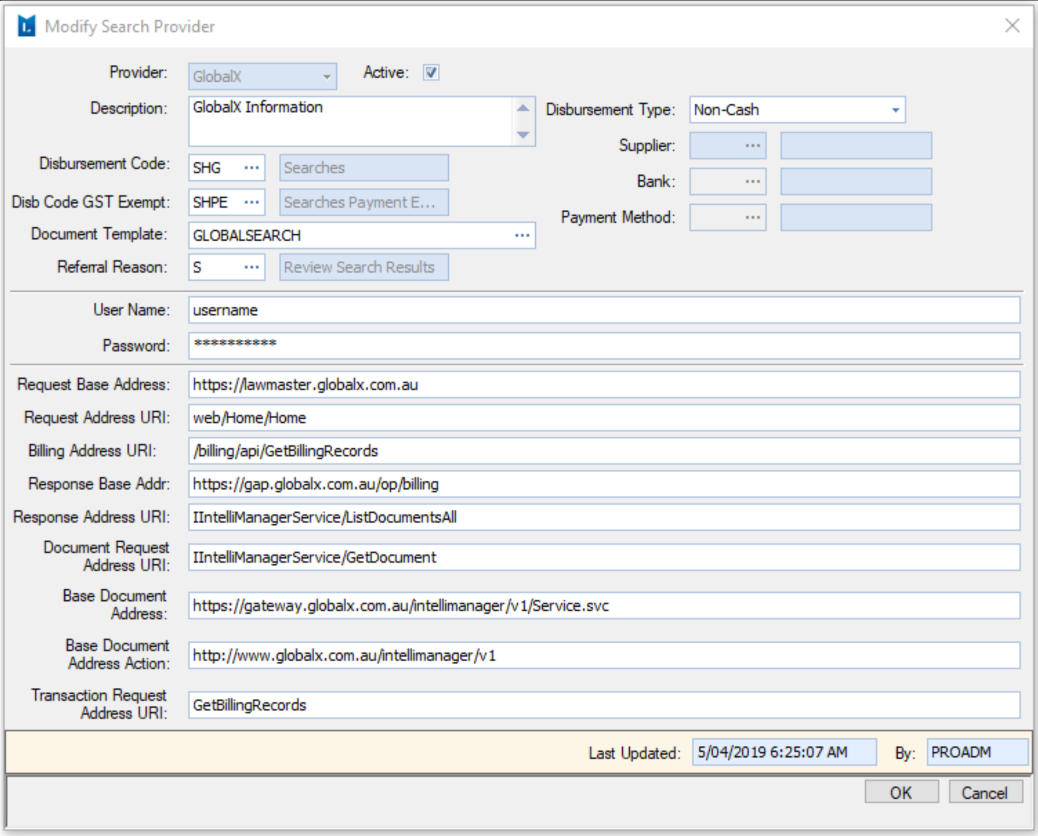
GlobalX Integration

44690
DEV-797

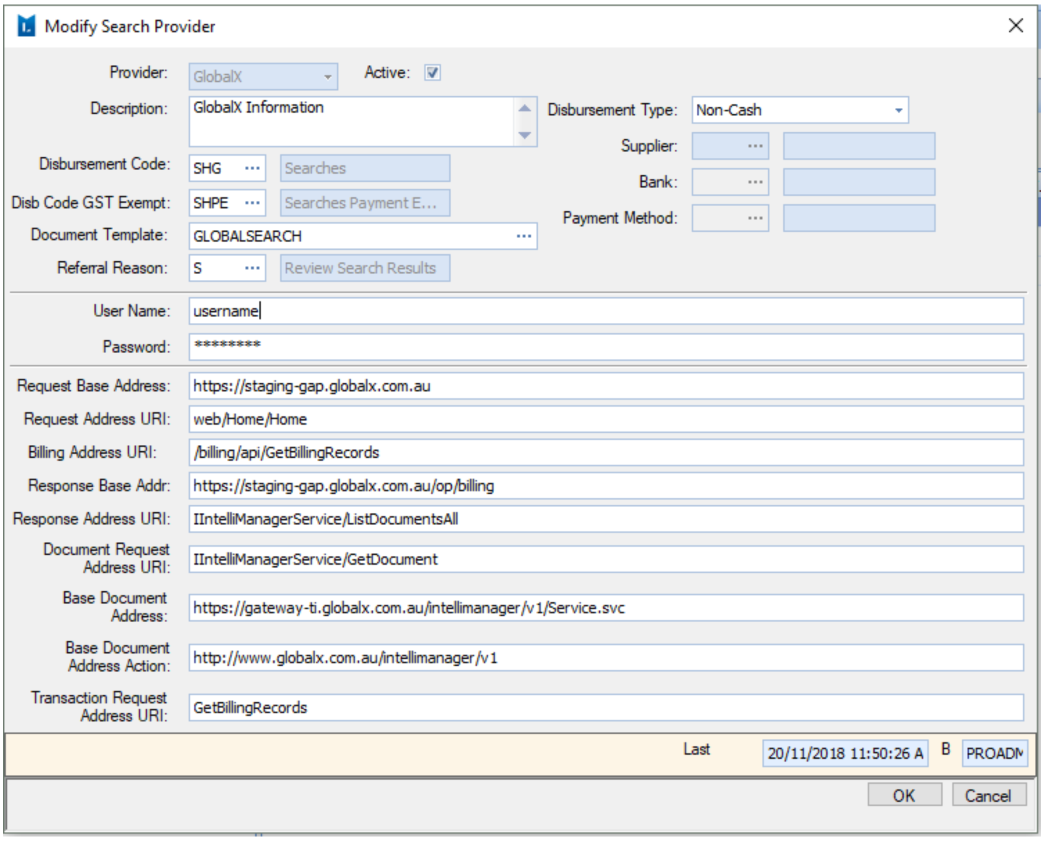
Security changes implemented by GlobalX caused issues with the LawMaster Integration. This has been corrected and a new field added to the GlobalX SPR Parameter called "Billing Address URI".

On upgrade to Sweden, the GlobalX SPR Parameter will be updated and new values applied to the "Response Base Addr" and "Billing Address URI" fields based on the database type being Production or Training.

Screenshots of the updated parameters are detailed below.



Production Database



Training Database

Trust Accounting

Trust Transfer Narrative

38245
DEV-227

Users can now define the Trust Transfer Narrative for the Trust Account Payment and General Account Receipt at the firm level via Parameters → Accounting → Trust Transfer Narrative.

On upgrade to Sweden, the Trust Transfer Narrative will default to "Trust Transfer - Costs and Outlays".

User Defined Queries

MBD Token available in User Defined Queries

39785
DEV-354

A month beginning date 'MBD' Token has been added to the list of pre-defined tokens available for use in LawMaster either via User Defined Queries or the Job Scheduler.

MBD can be used as a System Constant in the User Defined Query module > Query area (eg. '<<MBD>>') or as a Default Value for Prompting Tokens (eg. <<MBD>>).

Script Error when opening Power BI Report in LawMaster

44671
DEV-794

Corrected an issue where Power BI Reports embedded into LawMaster were displaying Java Script Errors.

Workflow Development

Users can record Entity Variables against an Entity

40905
DEV-396

Users now have the ability to store entity variables (e.g. Driver's Licence details) against an entity. Entity variables can be updated from the user interface, the reverse merge process or through workflow. A new tab called Variables has been added to the Entity Search screen which allows users to add/modify/delete entity variables via the Context Menu.

Entity variables are variables defined in a Document Assembly and Workflow Template with a base application type of C. Only one Entity Template Type of C can be set as Active and Visible on a database.

On upgrade to Sweden if a Template Type of ENT does not exist, one will be created with a Base Type of C.

Reverse Merge Entity Variables
Entity Variables can be added/updated using Reverse Merge. The Entity Variable must be set to Import within the PDF Document Template and mapped from Script Wizard in the LawMaster Variable field by selecting the Entity Template and Data Group of Template. An Entity Placeholder must also be selected.

Forward Merging of Entity Variables into a Word/PDF Document Template

41608
DEV-396

Entity Variables can be merged into a Word/PDF Document Template. They are accessed from the Script Wizard by selecting the Data Group of Entity Variables and the appropriate Party based on the selected Template.

The document template can be registered to an Entity, New Client Enquiry or Matter Template Type.

Error when Registering Hotdocs Variables

44816
LM10-370

Corrected an issue where Hotdocs Variables or a Case Plan Framework could not be registered as a result of a missing parameter.

Other

Login Password field length has been extended to 128 characters

43098
DEV-637

We now support passwords up to 128 characters in length. Previously we only supported 8 characters and any additional characters that were typed in were ignored. If you have any issues logging in at first, and your password is greater than 8 characters in length, then just type in the first 8 characters. Once you are logged in you may change your password to any password up to 128 characters.

Upgrade to Dev Express

43199
DEV-646

Dev Express has been upgraded to version 18.1 providing improved grid controls, grid column filters, and general performance and reliability improvements.

Updating License Parameters

40511
DEV-684

Corrected an issue where updating License Parameters caused Search Parameters to be disabled.

Link to new Knowledge Base

44328
DEV-745

Link to the Knowledge Base under the Help menu now directs users to LawMaster's new Knowledge Base site.

Testing

We recommend you undertake testing of the Sweden release in another 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
10.12.801	12/11/2018	Release of Sweden.
10.12.811	23/11/2018	Release of Sweden with the following changes: ❖ Correct Java Script Error in Power BI (DEV-794) ❖ LMAdmin supports SQL Server 2016 patches (DEV-808) ❖ GobalX Integration Issues (DEV-797) ❖ Error when registering Hotdocs Variable (LM10-370)
10.12.836	05/12/2018	Release of Sweden with the following changes:

Version No.	Date of Release	Summary of Changes
		❖ Corrected issue where default Info Type on Document Template was not being recorded on Folio Record when Merging Documents or saving Outward Emails – only affects users who had previously upgraded to Sweden. (LM10-372) ❖ Include Update Script to correct Info Type values for Folio Records created between 10.12.801 and 10.12.836. (DEV-825) ❖ Correct validation error when user modifies a Deed. (LM10-371) ❖ Document in Post Upgrade Tasks - Program Access to be re-established for Audit Payroll Transactions module. ❖ Add Deed using Entity Lookup (LM10-374)
10.12.842	23/01/2019	Release of Sweden with the following changes: ❖ Corrected issue where new Deed validation rules introduced in Sweden restricted the use of alphanumeric characters in existing Deed Packet sequences (DEV-853). ❖ Improved performance of Job Logs table to prevent potential issues when restoring a database from a database backup in LM Admin (LM10-382).
10.12.865	15/03/2019	Release of Sweden with the following changes: ❖ Adjustment to Deed validation rules to allow duplicate bundle numbers to be used on multiple entities. (DEV-864) ❖ Adjustment to Deed validation rules to allow decimal points on existing Deeds. (DEV-924) ❖ Corrected issue where Info Type was not being recorded on Search Records. Include Update Script to correct Info Type values for Search Folio Records created on 10.12.801or greater (DEV-925) ❖ Corrected issue where Email Drag/Drop produces Exception Error “Value cannot be null. Parameter name: key”. (DEV-913) ❖ Rebuild of Cabinets engine to improve handling and additional enhancements. (LM10-384 / DEV-875)

Version No.	Date of Release	Summary of Changes
		❖ Preview tab can be set as default view on opening Folio Enquiry. (DEV-729, DEV-959) ❖ Corrected issue with Arithmetic overflow error when running 'Print Billed Work'. (DEV-958)
10.12.865	15/03/2019	Updated Screenshots for GlobalX Parameters (DEV-797)