LawMaster Release Notes

Published: 04/06/2024

Version: 10.15

Release: Cuba R3

Contents

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 Cuba R3 Onwards

The following are supported upgrade paths to Cuba R3 onwards:

❖ *If you are running Portugal, Portugal R2, Cuba or Cuba R2* you can upgrade directly from your current version to Cuba R3.

❖ *If you are running a version earlier than Portugal:*

- You must first upgrade through each public release to get to Portugal. *For example, for releases prior to Portugal, 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 Portugal, you can then upgrade directly to Cuba R3.

Advanced Searching

If upgrading from any version prior to Portugal, you must upgrade Elasticsearch to Version 7.7.1. This is a manual upgrade process details, of which are outlined in the Advanced Searching White Paper available from the Client Service Centre ➡ Releases.

Pre-Upgrade Tasks

❖ Upgrade Advanced Search

If upgrading from 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. Further information regarding the upgrade can be found in the Portugal Release Notes.

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.

❖ Check-In Folios

We recommend all folios are checked-in prior to upgrading to Cuba R3 if coming from a version earlier than 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. If this does occur and the user is unable to check-in their file, the user will need to rename the file in their checkout folder to that detailed in the Working Folder of the Folio record. (53571)

Post-Upgrade Tasks

- ❖ If a different Bookmark Template is required update the Bookmark Template field.
- ❖ If you wish to disable the user from changing passwords to one that has already been used update the 'Passwords Remembered' field.
- ❖ For Word in Text searches - Search Within Documents to be wildcard aware set 00-WILDCARD parameter to Y.

Summary of Changes to Parameters

- ❖ 00-MIPS (R62467)
- ❖ Bookmark Template field - Folio File Name and Attachment Options (R63614)
- ❖ Previous Passwords Remembered (R54375)
- ❖ Classic UI to be deprecated post Cuba R3 (R63629)

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.

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". We note that if the latest version of Windows 10 or Windows 11 on the General Availability Channel or Microsoft 365 Apps on the Semi-Annual Enterprise Channel is available within two months of the subsequent LawMaster release we will have the opportunity to test against this version.[1] The time lag after the new product support commences depends on the scale of impact of the changes in Microsoft's product on LawMaster. We are continuously reviewing the support periods for the Microsoft product range that fall under the Modern Lifecycle Policy therefore these periods may be subject to change with each new release. We suggest you maintain products under these policies at the version we have tested against as we cannot guarantee compatibility with future versions.

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[1] Currently, if a Microsoft Version is released, for example, in February and the Next LawMaster Version will be released in July, testing will not be completed against the February version until at the earliest May when regression testing commences

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 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.

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.**

Cuba R3 Release

Microsoft Product	Microsoft Mainstream Support End	LawMaster Support Ends (by Version Name or Date)
Windows Desktop		
• Pro or above • 64-bit • General Availability Channel or Semi-Annual Channel		
Windows 10 • Version 22H2	14/10/2025	December 2025
Windows 11 • Version 22H2	08/10/2024	December 2024
Windows 11 • Version 23H2	11/11/2025	January 2026
Office Installations		
• 64-bit* • Installed on PC • Semi-Annual Enterprise Channel for MS 365 Apps		
Office 2021	13/10/2026	December 2026
Microsoft 365 Apps • Version 2208	12/03/2024	May 2024
Microsoft 365 Apps • Version 2302	10/09/2024	November 2024
Microsoft 365 Apps • Version 2308	11/03/2025	May 2025

Release Enhancements	Request No.

Client and Matter

Matter Summary links to Transaction History
63557

Users can now connect to the associated Transaction History from the label in the Matter Summary tab as follows:
- ❖ WIP and Disb labels link to Cost History
- ❖ Debtors label links to Debtors - Unpaid Items
- ❖ Trust label links to Trust History
- ❖ Investments label links to Investments History

The link is only available if the logged-in user has security access to the associated programs.

Firm Data Analysis - Matter Activity Report
63588

The Firm Data Analysis - Matter Activity Report option of Search By Partner has been updated to use the same Fees Billed calculation as the Lawyer option.

Costing and Billing

Performance Improvements made to Masterpiece module
63423

Changes have been made to improve performance of the Masterpiece – Export Bills and Adjustments module.

Performance Optimisation for LawMaster Queries
63606

Changes have been made to optimise Indexes within LawMaster on the matter_Att_values table and Costing Transaction Enquiry.

Input Cost Journal now available in Author Time
63617

Users can enter cost transactions whilst reviewing Author Time from Lawyer's Toolbar > Time. The Input Cost Journal module is available from the context menu.

Debtors

Debtor Balance added to Recent Matters
63558

A Debtor Balance column has been added to the Recent Matters window and is available in all three view modes (My (and Recently Worked On) Matters, Recently Worked On Matters, Work Unit (and Recently Worked on) Matters).

Document Management

Improved capturing of Elasticsearch server errors

60054

Capturing of Elasticsearch server errors by the LawMaster client has been improved. Depending on the specific scenario, these errors will either be displayed to the user or logged in the application log.

Folio Searching with Elasticsearch is Wildcard Parameter Aware

60677

Folio enquiry > Word in Text searches with Search Within Documents selected are now Wildcard parameter aware. If the 00-WILDCARD parameter is set to Y and Elasticsearch is enabled a wildcard will be automatically appended to the search criteria in the Keywords field allowing for a partial word match. For example, if the user enters the word prob in the keywords field it will search for all words that commence with prob eg probate.

Sensitivity Label Parameter for MIPS/Purview

62467

A new 00 Parameter has been created where Par_Code = MIPS to allow the System Administrator to define Document Templates that do not require a Sensitivity Label displayed.

To use the 00-MIPS Parameter, the following fields should be completed:
1. Flag (par_flag) - Indicates whether the Sensitivity Label change is activated on Template Merge. On upgrade to Cuba R3, the Flag field will be set to N by default.
2. Parent (par_parent) - Defines the Bookmark Name. If this Bookmark Name exists in the Template then a scan of the document will take place at the time of merge.
3. par_details_1 (par_details_1) - Defines the text to be searched at the time of the scan. If a Text Box that contains the text stored in this field exists, all text in the Text Box will be changed to the colour white.

Modify Folio created in Mailroom Processing raises Folio Search Error

63327

Corrected an issue where a Folio Search Error was displayed when modifying a folio created in the Mailroom Processing module.

Performance Optimisation of Folio Downloads

63378

Optimised security checks completed on folio download to enhance performance.

Preview of Rich Text on WP Form - Bill displays HTML code Incorrectly.

63572

Components were upgraded to enable previewing of rich text added to the WP Form – Bill at time of merge.

Matter Folio Search Issue

63592

An issue has been corrected where in some circumstances a Matter Folio Search could return a folio result that was not saved against that matter.

Bookmark Template Formatting Options

63614

The System Administrator can now define the format of Bookmarks using the Bookmark Template made available from Folio File Name and Attachment Options parameter accessed from Records Management folder.

On upgrade to Cuba R3, the Bookmark format will default to the format of [crt_date_dd/MM/yyyy]:[precis] which displays as [Date of Writing]:[Precis].

Additional variables have been added to support the output of different folio date formats.

Bookmark formats will be updated according to the Bookmark Template when the following functions are accessed:
- ❖ Cabinet Header > Export Folio(s) > PDF Combined
- ❖ Cabinet Items > Export / Print > Export Cabinet Items > Publish to PDF
- ❖ Folio Enquiry > Export / Print > Export Folio(s) > Publish to PDF
- ❖ Referrals > Export Folio(s) > PDF (Combined)

Folio Enquiry windows that have a context menu option of Export/Print have a new function of Drag and Drop. The user can multi-select folios then select Export/Print > Drag and Drop. On selection of Drag and Drop the selected folios are downloaded and displayed in a new tab labelled 'Windows Drag and Drop' together with the date and time of the action. Folios displayed in the Windows Drag and Drop tab will retain the same ordering as the original grid.

The name of the file following export is displayed in the Export File Name field. The Export File Name is initially generated based on the Cabinet Item Export Template if exported from a Cabinet or the Folio Export Template if exported from Folios Enquiry. (Folio File Name and Attachment Options from Parameters > Records Management) Export File Names have a suffix of '_1' unless the name is duplicated at which time the suffix will increase by 1 e.g. '_2', '_3', etc.

Context Menu options of 'Rename File' and 'Convert to PDF' are available from 'Windows Drag and Drop' tab. The 'Rename File' option allows the user to customise the Export File Name for each folio. The 'Convert to PDF' option will temporarily convert the selected files to PDF format for the purposes of the Drag and Drop. The Export File Name field will display the results of those options as the user makes changes.

If files are dragged into Outlook, email message files will be renamed to the original Subject line, this is standard Outlook behaviour. We recommend you either convert the email to PDF in the 'Windows Drag and Drop' tab or attach the folios to an email using the 'Send Folio(s)' context menu option.

The final drag order is as per the ordering in the 'Windows Drag and Drop' tab.

The final display order in the drop zone will be based off the rules for the selected application eg dropped files will be displayed in Date Modified order if the Windows Explorer display order has been set to that option by default.

Files that have been downloaded in readiness for drag and drop will be removed when the Clear Temp Files module is run from Menubar > File. If the user attempts to Drag and Drop files that are no longer available a message will be displayed to the user. Downloaded files are also removed when the 'Windows Drag and Drop' tab is closed.

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Drag and Drop now uses the Modified Date of the file as Date of Writing

63618

When dragging and dropping files into a Folio or Cabinet Items window from Windows Explorer, the Date of Writing will be set to the Modified Date of the file.

The workflow function for Add-Document() will also now set Date of Writing to match the Modified Date of the input file.

Modifying Folio Details caused loss of file during Template Merge via Workflow

63620

Corrected an issue that occurred if folio details were modified from the Folios Enquiry grid whilst the Modify Folio form was still displayed causing the file to be deleted. If the folio details have been modified from the Folio Enquiry grid before the user closes the Modify Folio form a message will be displayed, "This Folio record has been updated, please review". On selection of OK the updated folio details will be displayed to user in the Modify Folio form for review.

Lawyer's Workbench

Unable to Append to existing File Note 63445

Corrected an issue where an error was displayed if a user selects Yes to append to an existing File Note in Lawyers Workbench.

Actioning a Bringup does not open Lawyers Workbench 63555

If 'Create File Note for Matter Bring-ups' parameter is selected the Lawyers Workbench window will now open on Actioning of the Bring-up.

Other

Removal of Newsletter link 63616

The link to the Newsletter is no longer being maintained directly in LawMaster and the shortcut button has been removed from the Help menu. Future Newsletters will be forwarded to customers via email.

Payroll

Reporting Earnings and Super on Terminated Employees 63377

The Print Superannuation Register and Print Earnings Summary by Company will now include terminated employees that have a pay run or super transaction within the nominated date range.

System Administration

Previous Password Re-use can be Disabled 54735

It is now possible to prevent the re-use of previous passwords when a user changes their password. Attempting to re-use a password, outside the parameterised setting, will prevent the password from being saved and the following message will be displayed, "The New Password has been used before. Please pick another password.". The 'Passwords Remembered' parameter (Parameters > Set Parameters > Miscellaneous > Processing Options > Password Options) will be set to 0 on upgrade to Cuba R3 which indicates the user can continue re-use previous passwords. The other options available are -1 to indicate no previous passwords can be re-used and any value greater than 0 will indicate the number of times a password must be changed before it can be re-used.

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Display of Form Screen Position and Ordering 59161

Several forms have had their screen positioning changed when they are initially displayed to help prevent parts of the form from appearing off-screen or behind other forms.

LawMaster Admin now supports SQL Server 2022 63034

LawMaster Admin now supports Microsoft SQL Server 2022. Please contact us if you would like to discuss this further.

Issue with Date Formats when importing CSV File 63419

Corrected an issue with date formats when data was imported using a CSV file.

Audit Trail Report for All Security Records 63524

A correction has been made to an issue that could cause incorrect date values to be displayed in the Audit Trail Report for All Security Records report.

Matter_Check_List Table Description 63622

The description for the Matter_Check_List table has been updated as follows: "The Matter_Check_List table holds the most recent history of each task performed for each matter actioned as part of matter task management."

Analyse User Logins Report 63628

The Analyse User Logins Report has been expanded to include additional information including:
- ❖ Log In Type eg Outlook or Windows
- ❖ Log In Date and Time
- ❖ Log Off Date and Time
- ❖ Login Hours (summarise totals) calculated as follows if no Log off date/time recorded:
  - o Where there is a Login Time before 5:00 pm calculate Log off Time as 5:00 pm
  - o Where there is a Login Time after 5:00 pm calculated Log off time as midnight

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Classic UI option to be Deprecated Post Cuba R3

63629

The 'Graphical User Interface' Parameter that allowed System Administrators to roll back to the pre-Cuba interface for individual users will no longer be supported in releases after Cuba R3. (Parameters > Set Parameters > Miscellaneous)

Trust Accounting

Error when reversing Trust Receipt

63623

Corrected an issue where reversing a Trust Receipt for $10,000,000.00 was reporting an error to the user.

User Defined Queries

UDQ Blacklist has been Extended

63619

The blacklist preventing access to certain database objects (eg tables and views) has been extended to cover additional requirements. This will not impact existing UDQ's.

Update list of Tables and Views available from UDQ

63498

Additional Tables and Views have been added to the list of UDQ Allowed Objects.

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

Version Control

Version No.	Date of Release	Summary of Changes
10.15.3183	17/05/2024	Release Notes
10.15.3227	04/06/2024	New Release Version.

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