

Release Notes

Linetime Version: Liberate SE V4.4

Release Date: 16/06/2023



Linetime

Legal Practice Management Software

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Features and enhancements

Business Intelligence Dashboard

General

S081317 **Added ability to rename panels and suites.**

Users are now able to edit and save both panel & suite captions without having to create a fresh/new one.

Liberate A2A Interface

Integration - A2A

S085438 **New Token changes for A2A**

Changes made to A2A integration for token/password change

Liberate B2C

B2C Administration utility

S085551 Email generated in B2C with incorrect details

Three sets of changes have been made to B2C to prevent incorrect data display if the ASP.Net session cache become corrupt.

1. When displaying the homepage, if the user name no longer exists, the signed in user will not be shown any clients/SOIs, just an error message.
2. The case/debt listings have a check that if the user name no longer exists, the signed in user will be shown an error message.
3. The case/debt review checks when it loads to make sure that the case code is retrieved. If not, the signed in user will be shown an error message.

Security

S085719 Web site security

Web site maintenance has 2 new tickboxes available on the security tabs for B2C, Self-Serve and Voyager to allow the forcing of 2-factor or the denial of 2 factor authentication.

These are mutually exclusive as well as Pin code not required during sign-on.

Additionally, the web user maintenance now allows the entry of a mobile phone number to be used for SMS if the force 2-factor authentication is selected for the web site.

Liberate Outlook 2010 Addin

Auto-Attach

S084942 Email Updater, Outlook Add-In interoperability - Do Not Auto Attach.

Email Updater will now honour the Do Not Attach intention specified by a User when processing an Email that has associated Case Information within the Liberate Outlook Add-In.

Liberate SE

Appearance and Accessibility

S085538 Updated themes and palette options for Liberate

Windows 11 Themes now available

“WXI” and “WXI Compact” can now be selected as themes.



As its name implies, this new skin/theme is patterned around Windows 11 (not just Microsoft Office).



We also understand the need to maintain “tight” designs for data-intensive applications. To help you display the maximum

amount of information on-screen, "WXI" will ship with a "Compact" variation (available as a separate option within skin selector items).

High Contrast Skin

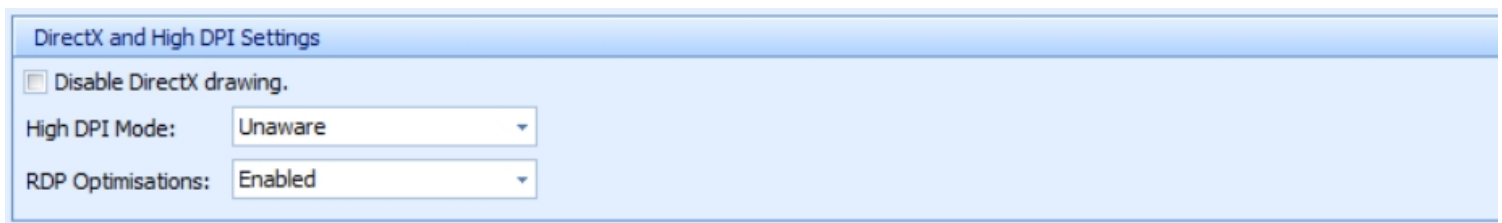
Palette selection for skins now available

As well as the existing skin selector, there is now a secondary "palette" selector available for some skins, granting further choice to the user about the appearance of their selected skin.



S085529 RDP Optimisations

Tip: To maximize performance, we recommend that you apply a [flat vector skin](#) (for instance, "Bezier" or "Basic"). Skins with gradient bitmaps (such as "Valentine" or "Caramel") generate more traffic and can negatively impact the user experience.



RDP Optimisations

Gets or sets whether the affected applications should disable various visual effects to enhance the performance when accessed over slow remote connections.

AutoDetect (default): The system will automatically detect if you are running in a Terminal Services or Citrix environment automatically and enable RDP Optimisations if you are.

Disabled: RDP Optimisations are off.

Enabled: RDP Optimisations are on.

Affected Applications

Liberate SE

Liberate Admin

Liberate Outlook 2010 Addin

Remarks

When enabled, this property minimizes the amount of visual effects and animations. This allows applications to reduce traffic consumption and improve overall performance in remote environments.

The `RDP Optimisations` property has the following effects:

Animations

- Transition animations.
- FadeIn and FadeOut effects of splash screens.
- Bar item link hover animations.
- Various expand/collapse, sort, drag-and-drop, and other animations that follow end-user actions.

Shadows removed

- Shadows cast by XtraForm, XtraDialog and XtraMessageBox.
- Bar sub-menu shadows.

Other effects

- XtraForms display thick borders for a better drag-and-resize experience.
- Scroll paint operations are delayed for 75ms.
- Acrylic Material and Reveal Highlight effects for Fluent Design Forms are disabled.

Billing

S085466 SE Bills review area default date range for bills status date

A new column is available to select as a column chooser view in the bills review area of SE billing, this reflects the status date of the bill, this being the date the bill was actually raised regardless of bill or posted date.

This view once set will remain as a view and will not require adding again.

The date range can predetermined in the SE red globe admin area of Liberate

Document Preview

S085528 The document preview window can now render chart data within documents

For example, a Word document that has an embedded chart in it will display in the preview window with the chart fully rendered.

General

S085522 DevExpress Component upgrade (Liberate application sub-components)

Liberate SE sub-components upgraded to utilise latest DevExpress components as with rest of application suite.

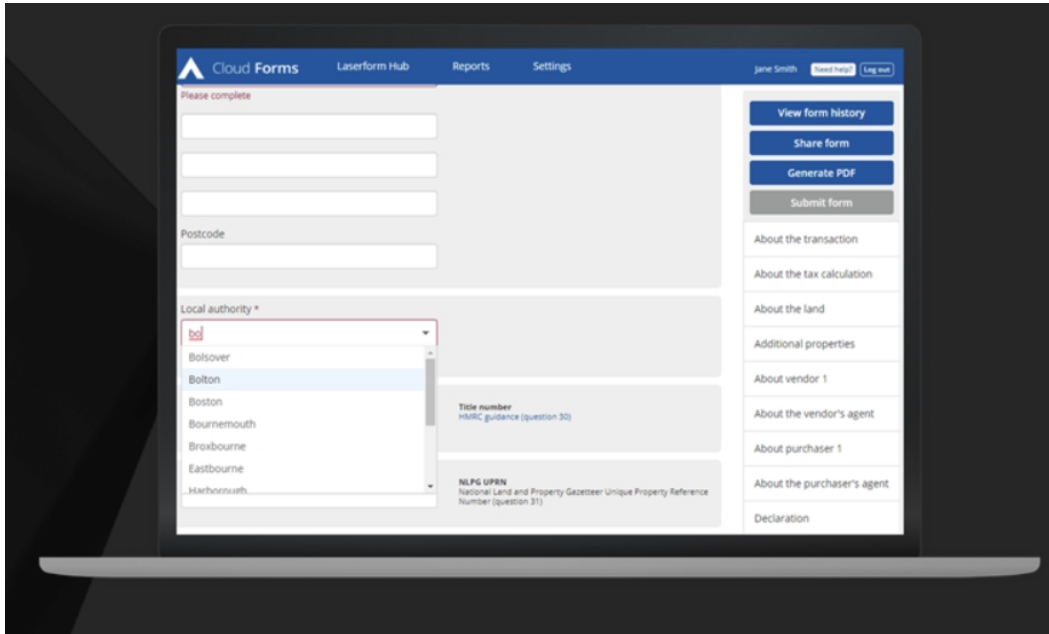
S083268 New Refresh Button now available on Dashboards within Liberate SE

A new Refresh Button is now available at the top right of each dashboard at command level within SE. Clicking this button will refresh the dashboard to display the latest data.

Integration - CloudForms

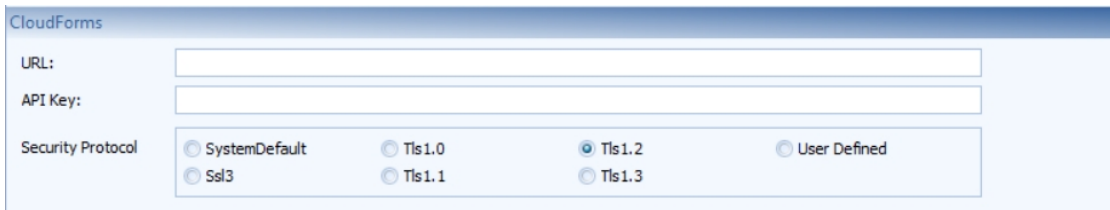
S085510 LiberateSE now integrates with Cloud Form

LiberateSE now integrates with Cloud Forms from Advanced.



The screenshot displays the Cloud Forms interface on a laptop screen. The interface has a blue header bar with the 'Cloud Forms' logo and navigation links: 'Laserform Hub', 'Reports', and 'Settings'. The user 'Jane Smith' is logged in, with a 'Search help' button and a 'Log out' button. The main form area is titled 'Please complete' and contains several input fields. A dropdown menu for 'Local authority' is open, showing a list of options: 'Bolton', 'Bolton', 'Boston', 'Bournemouth', 'Brixbourne', 'Eastbourne', and 'Hastbourne'. To the right of the form, there is a sidebar with buttons: 'View form history', 'Share form', 'Generate PDF', and 'Submit form'. Below these buttons are sections for 'About the transaction', 'About the tax calculation', 'About the land', 'Additional properties', 'About vendor 1', 'About the vendor's agent', 'About purchaser 1', 'About the purchaser's agent', and 'Declaration'. The form also includes fields for 'Postcode', 'Title number', and 'NLPG UPRN'.

There are new settings in User and Admin options for the log in details for Cloud Forms



The screenshot shows the 'CloudForms' settings page. It has a blue header bar with the 'CloudForms' logo. The page contains several input fields and a section for 'Security Protocol'. The 'URL:' field is empty. The 'API Key:' field is empty. The 'Security Protocol' section has radio buttons for 'SystemDefault', 'Ssl3', 'Tls1.0', 'Tls1.1', 'Tls1.2', 'Tls1.3', and 'User Defined'. The 'Tls1.2' option is selected.

Please contact Linetime for further information.

Integration - FormEvo

S081830 Integration with FormEvo

LiberateSE now integrates with FormEvo.

What FormEvo Offers

FormEvo is the next generation of legal forms, future proofing your practice.

Our agile development approach allows us to develop new functionality for the road ahead but also react quickly to the unforeseen challenges law firms will face in the years to come.

See new options in User and Admin options for the log in details for FormEvo

FormEvo

URL:

Client ID:

Client Secret:

Security Protocol

☐ SystemDefault	☐ Tls1.0	☒ Tls1.2	☐ User Defined
☐ Ssl3	☐ Tls1.1	☐ Tls1.3	

Please contact Linetime for further information.

S081830A FormEVO - require Linetime daily password to enter login credentials

Added requirement to enter the Linetime Daily password the first time any FormEVO details are entered into the Portals tab of the Red-Globe admin options. Once password has been entered and the details saved for the first time it will not prompt for the password again.

Integration - PerfectPortal

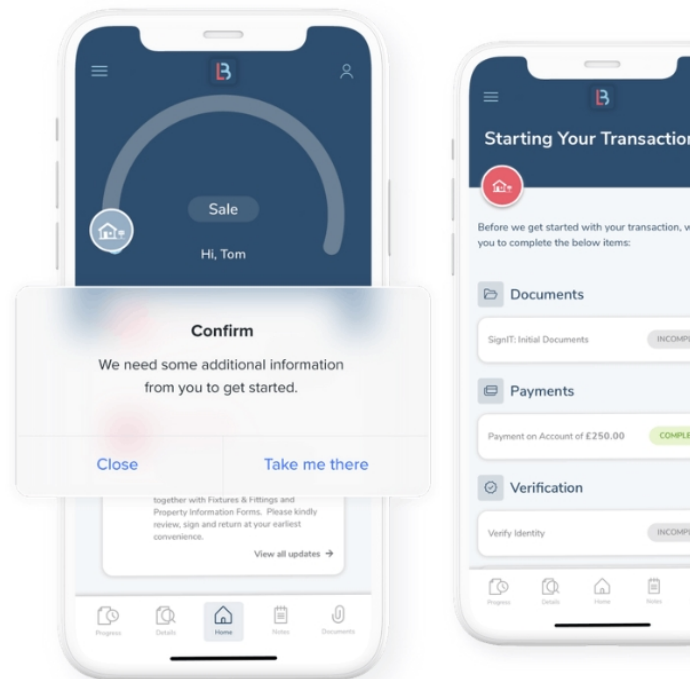
S085359 Perfect Portal Liberate Integration Phase 2

COMPLETE ONBOARDING SOLUTION

Smoothly onboard clients all within one user-friendly central hub

Our range of digital onboarding features allows your firm to exceed client expectations whilst keeping all case details in one centralised place.

- | | |
|----------------------------|-------------------------------|
| ✓ Verification of Identity | ✓ TA6 Part 1 Form |
| ✓ Verification of Funds | ✓ Law Society Forms |
| ✓ Payment on Account | ✓ Personalised Matter Updates |
| ✓ Document Share | ✓ Client Reviews |
| ✓ e-Signature | ✓ Chat |



Phase 2 of the Liberate - Perfect Portal Integration includes:

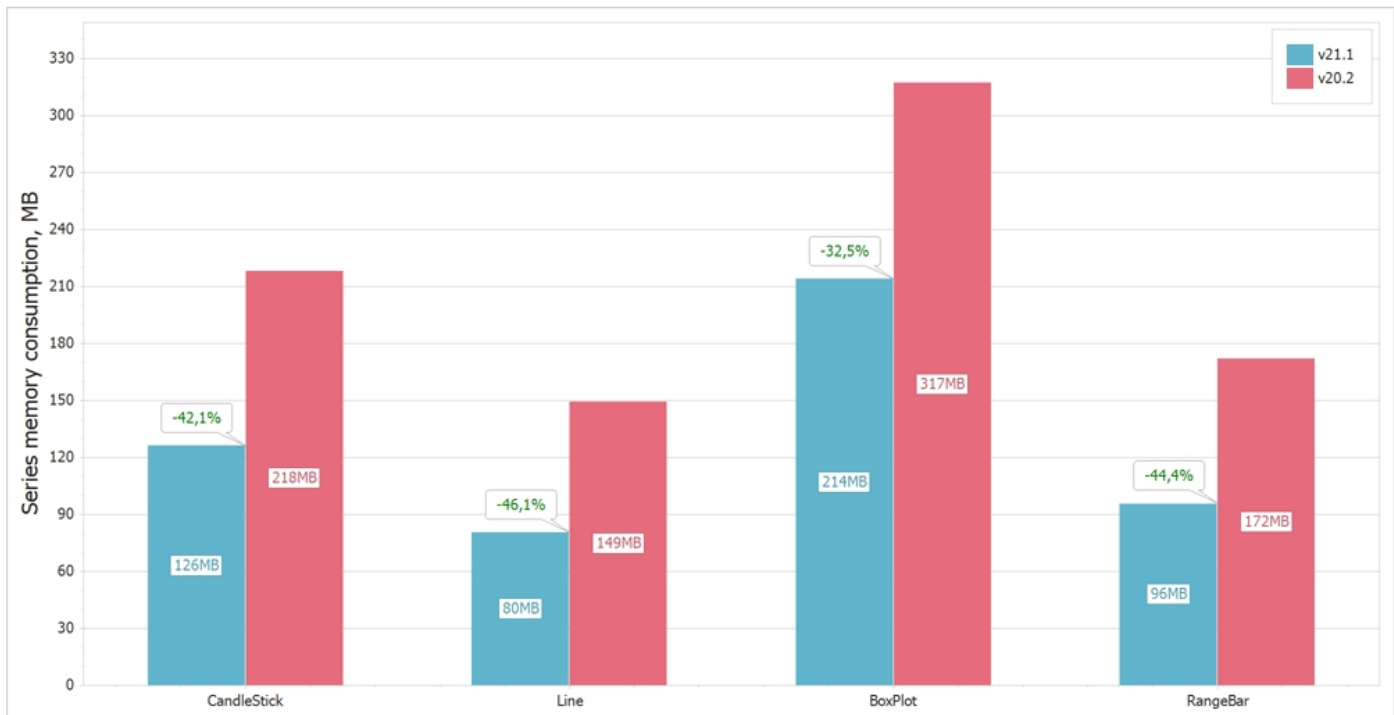
- Key Stage and Expected Completion Date Updates
- Ability to Refresh Additional Key Stages
- Implemented user mapping in Liberate Admin and fixed case updates issues back to perfect portal.
- Added ability to update perfect portal configurations manually.
- Added ability to create property details as individual mapping definitions.
- Added data mapped to table type data items to be created during case import.

Reporting - Reports

S085533 Various Enhancements to Reporting

Memory Optimisations in Charts in Dashboards

With this release, our [WinForms Chart Control](#) allocates less memory when used in data bound mode. This enhancement has allowed us to increase the maximum number of visible data points for x86 apps without significant performance degradation (up to 20M).



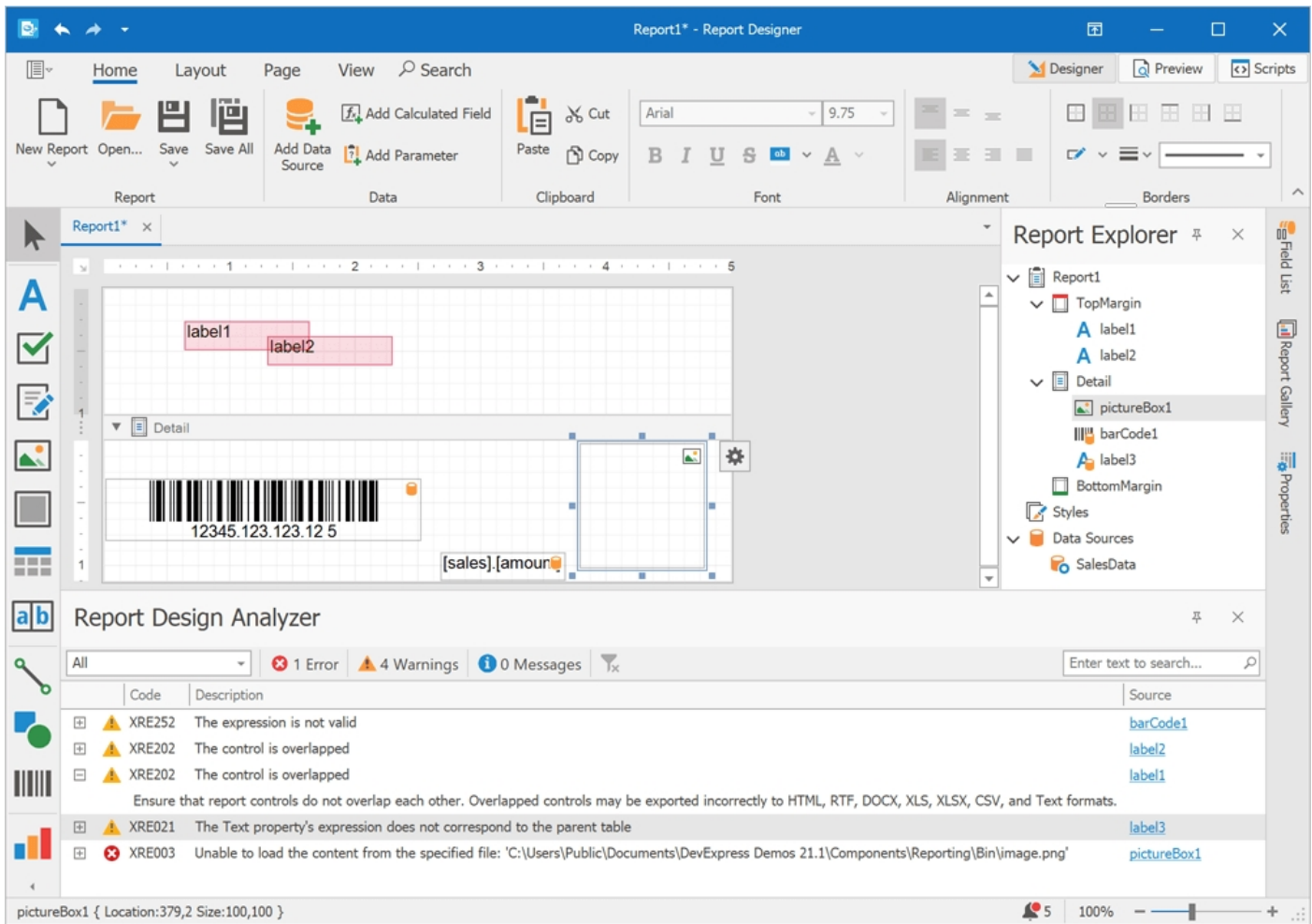
Report Designer Analyzer

The Report Designer “Scripts Errors” panel has been improved and renamed to “Report Design Analyzer”.

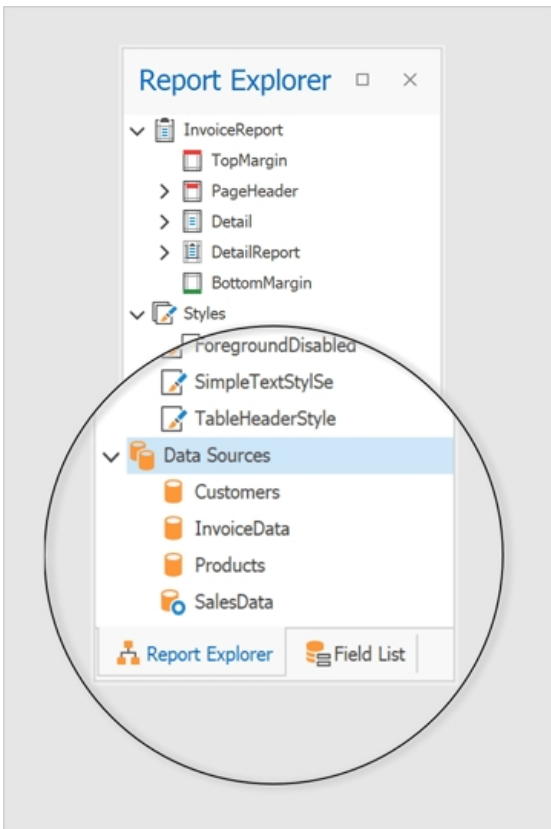
This panel helps you avoid design-related mistakes that can affect document appearance and generated export files. It scans your report for changes on the fly, points you to report layout issues, and lists actions you can take to avoid potential errors.

You can filter errors and warnings using the following categories:

- Layout Issues
- Scripts Issues
- Document Generation Issues

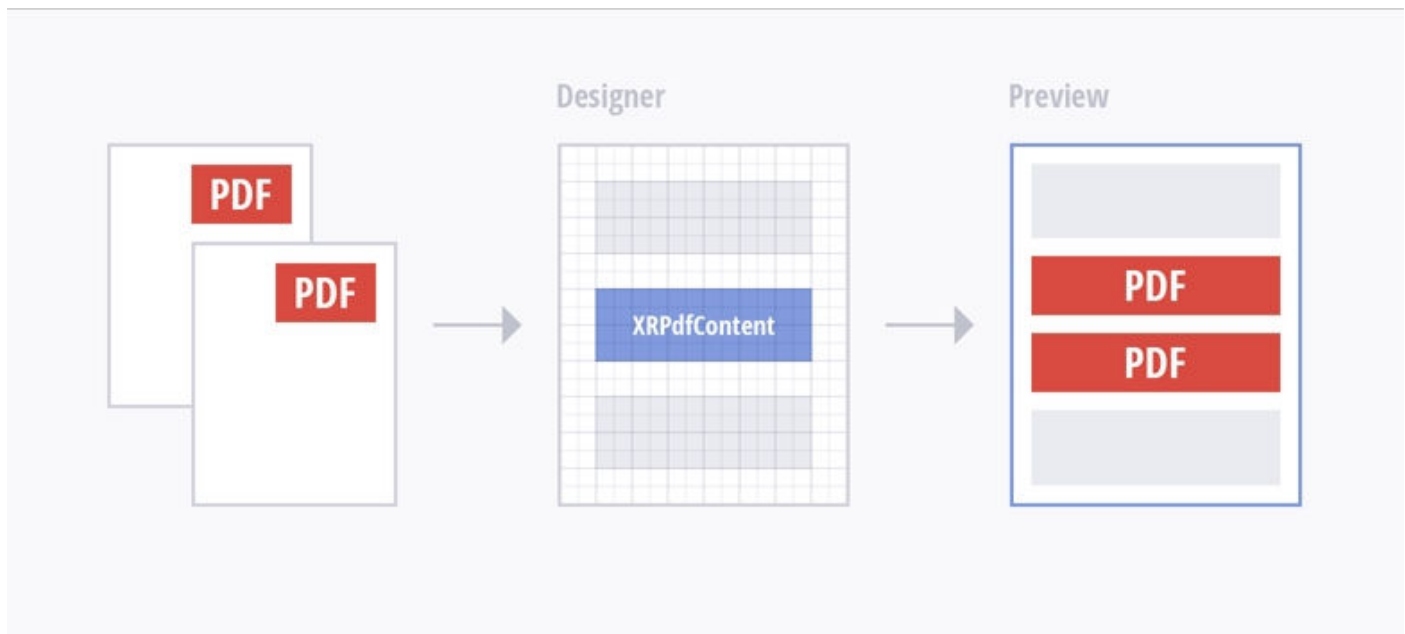


The Report Explorer now lists available data sources.



PDF Content - Embed PDFs into Report Pages

The **XRpdfContent** report control exposes a new 'GenerateOwnPages' property – a property that manages operation mode. This control can act like a subreport when the property is disabled. With the help of a control placeholder, you can limit the area to scale and embed PDF files directly into your report. Refer to the following diagram for more information on our implementation:



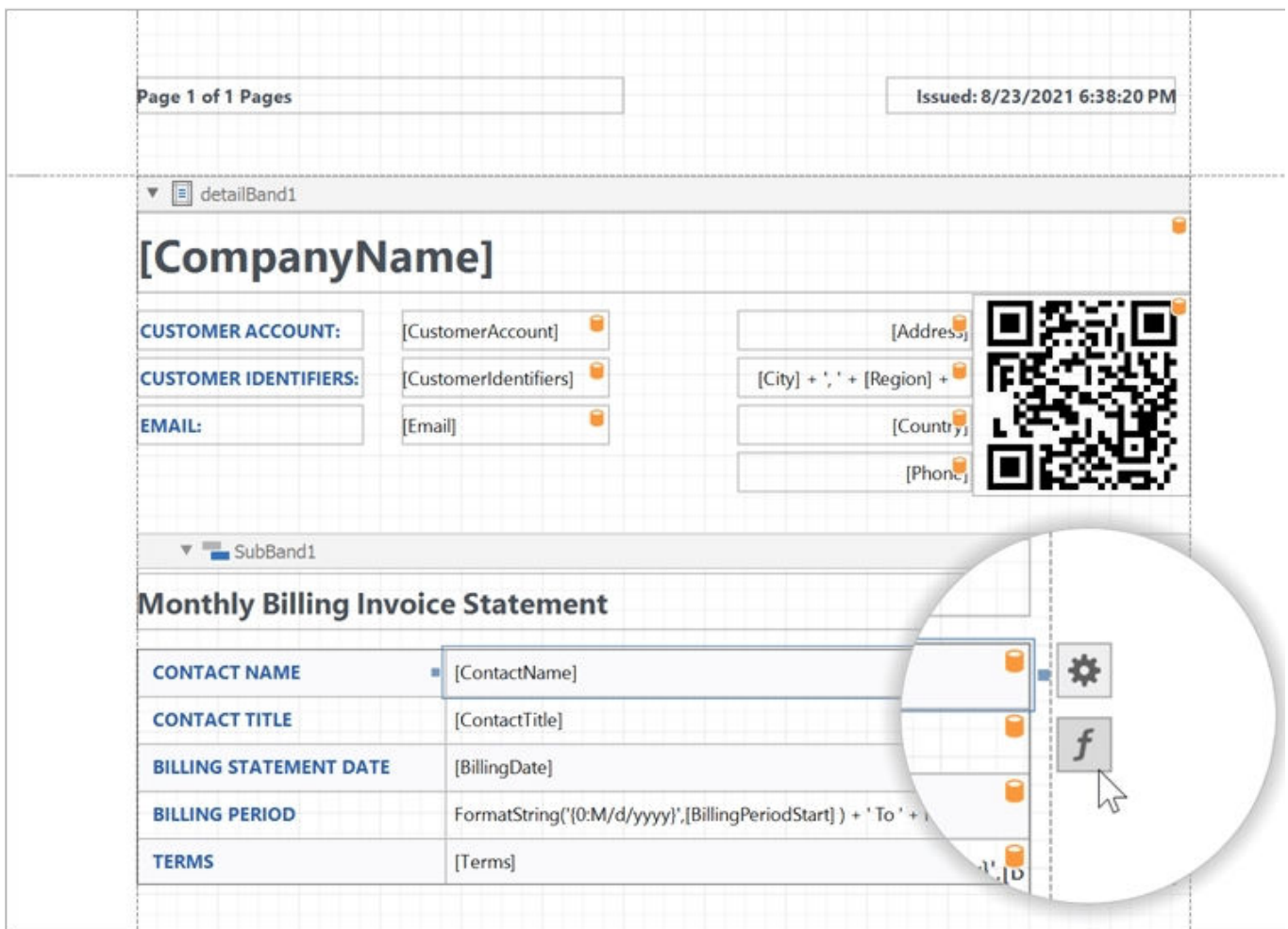
This new mode is useful when:

- You need to embed PDF file content into a report with common headers/footers (headers/footers will be printed on PDF file pages as well).
- You need to print specific content (pictures, bar codes, page numbers, a report watermark) over the contents of your PDF file.
- You need to design a pre-printed form and use a PDF file as a watermark.
- You need to create a report document with an A4 paper kind and include a PDF file with different page dimensions.

Report Designer - Expression UI Enhancements

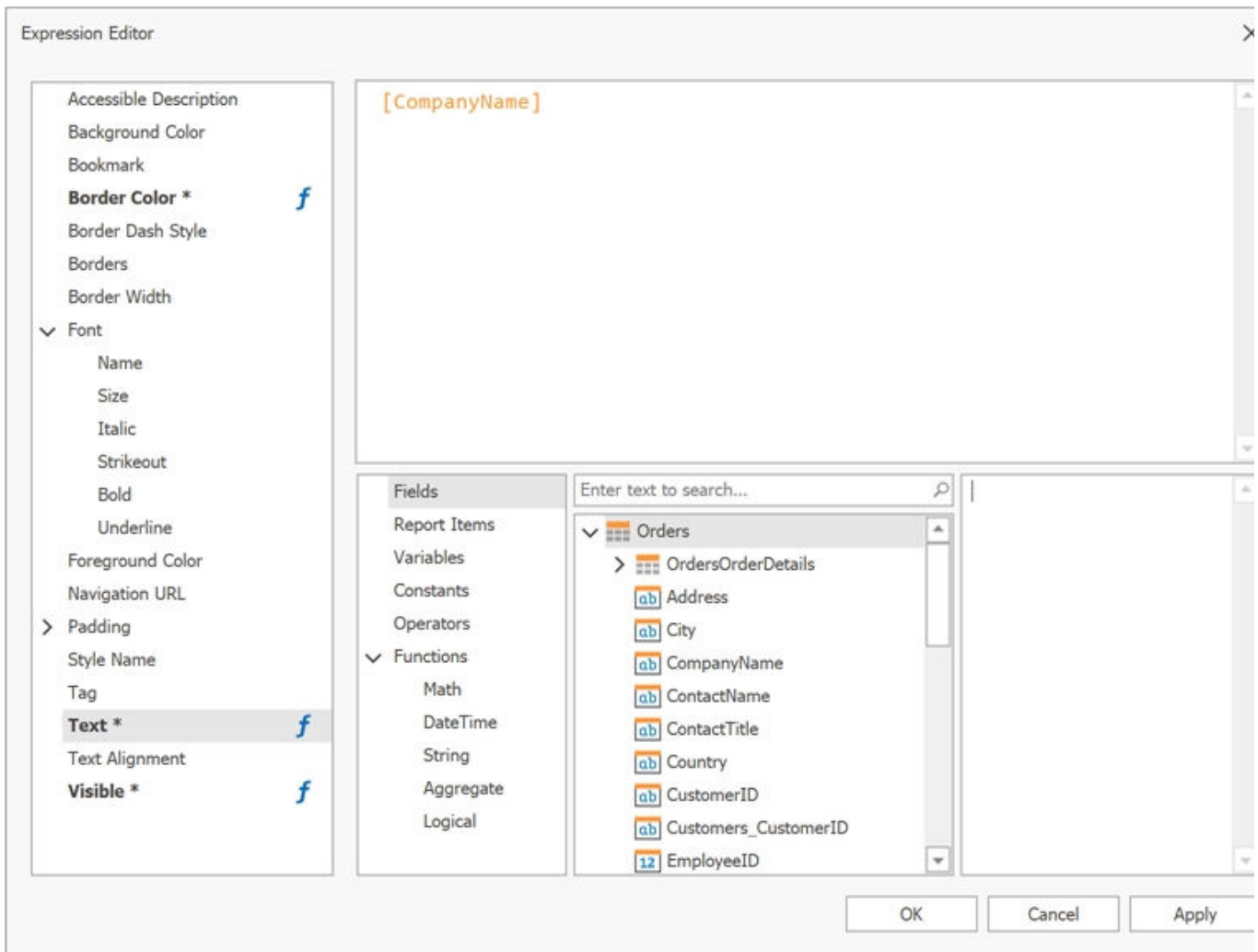
It is now easier to define expression bindings within the DevExpress Report Designer. New enhancements include:

- A new **f**-symbol button is displayed next to the selected control. This button allows you to invoke the Expression Editor instantly.

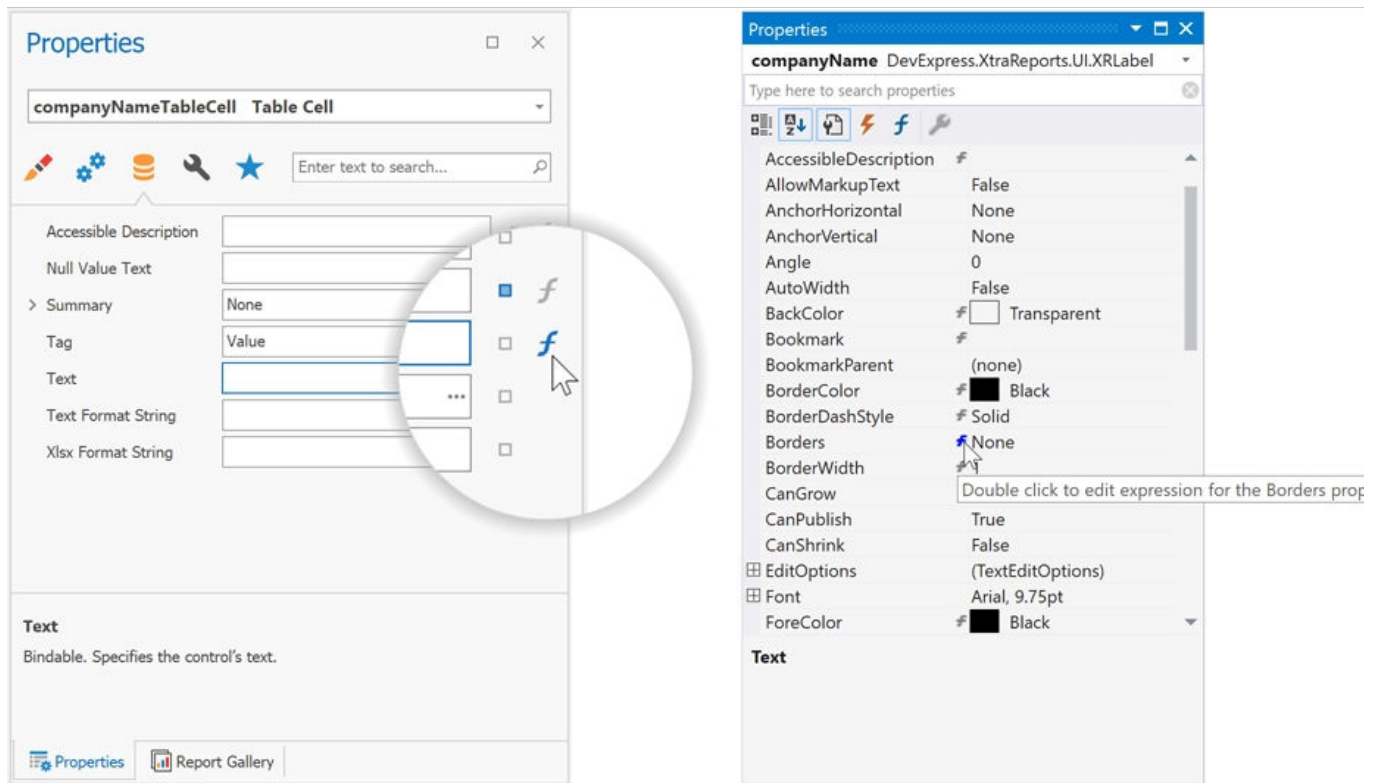


- We enhanced the [Expression Editor](#) so you can set up expression bindings for various report control properties within the Expression Editor itself. A glowing formula-**f** symbol indicates that a property has an

expression assigned.

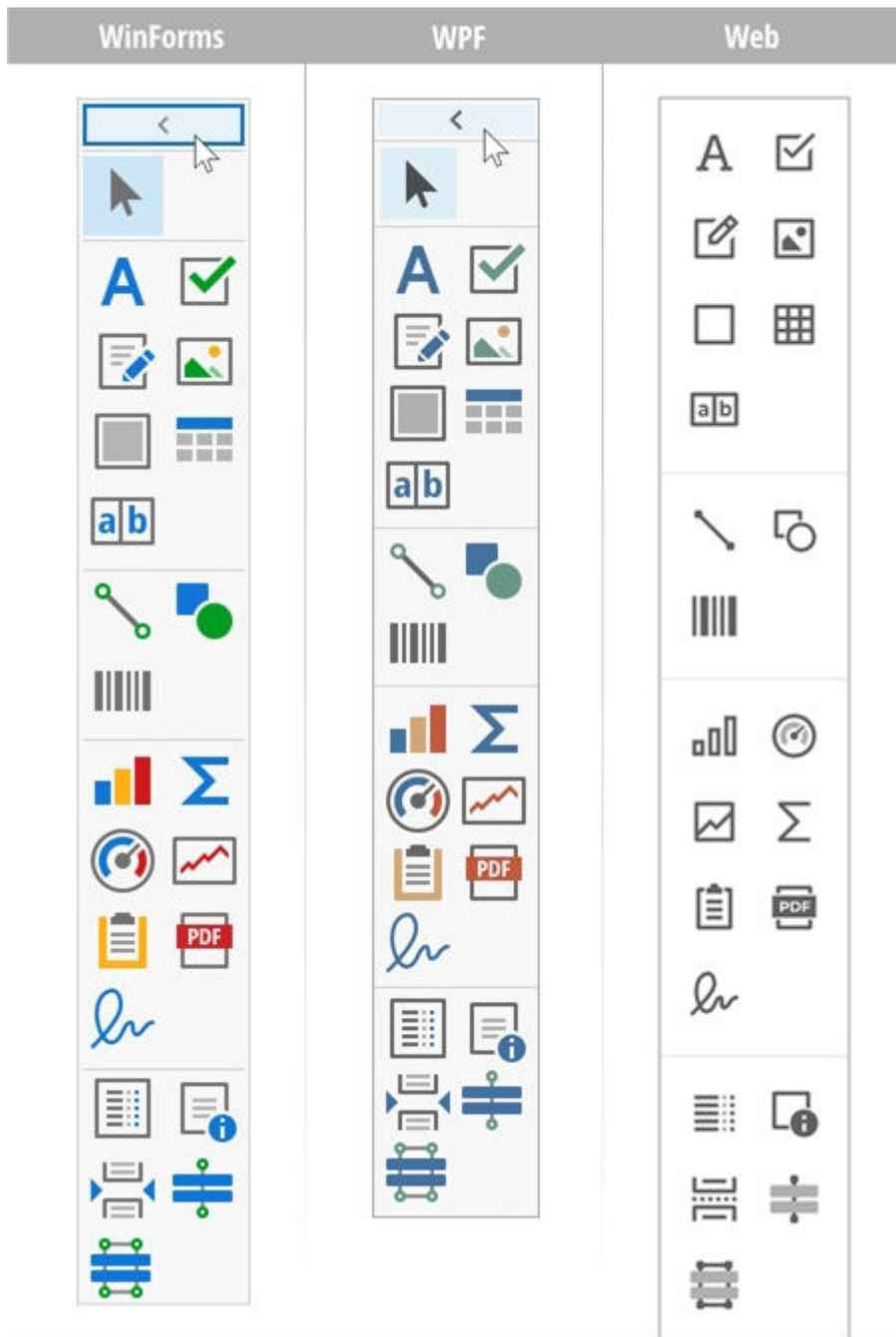


- The [Properties Panels](#) (displayed within our End-User and Visual Studio Report Designers) now highlight bindable properties with a formula symbol.



Report Designer - New Toolbox

All runtime Report Designers feature a new two-column toolbox layout (and displays the entire set of report controls). You can expand/collapse the toolbox in the desktop version of DevExpress Reports (WinForms and WPF).



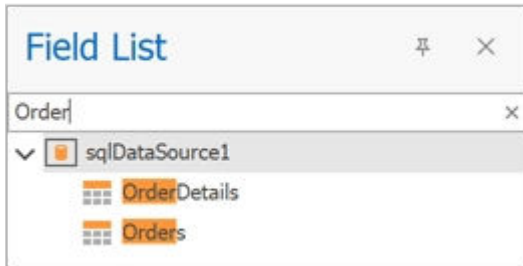
Report Viewer - DirectX Support

The Report Viewer control now supports DirectX rendering for both UI elements and the report document. The benefits of DirectX rendering are numerous and include:

- Up to 80% faster document rendering.
- Smoother scrolling experience.
- Enhanced responsiveness in multi-page view.
- Enhanced glyph rendering quality thanks to DirectWrite.

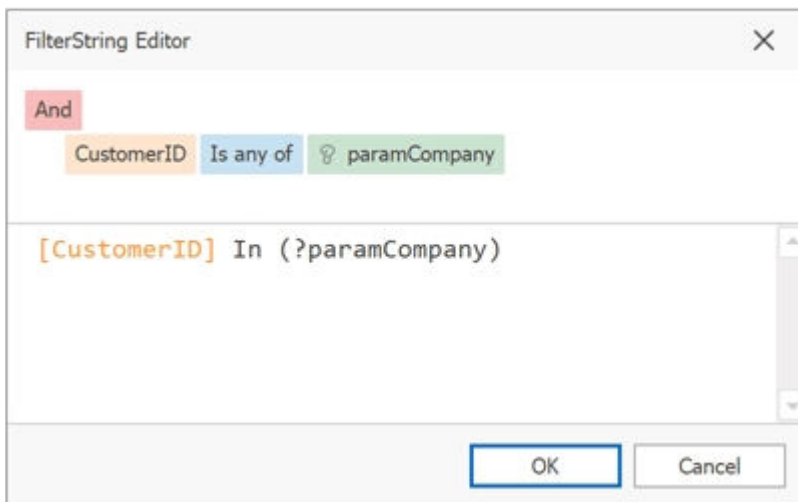
Miscellaneous Enhancements

- Report Explorer and Field List panes now integrate instant search.

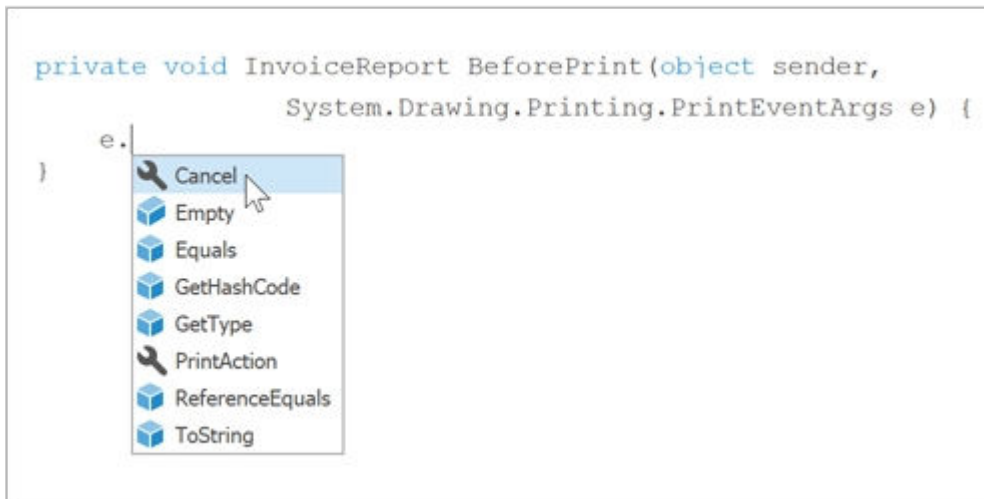


When a user searches for a specific element(s), the tree automatically expands down to the element(s) that matches the search criteria.

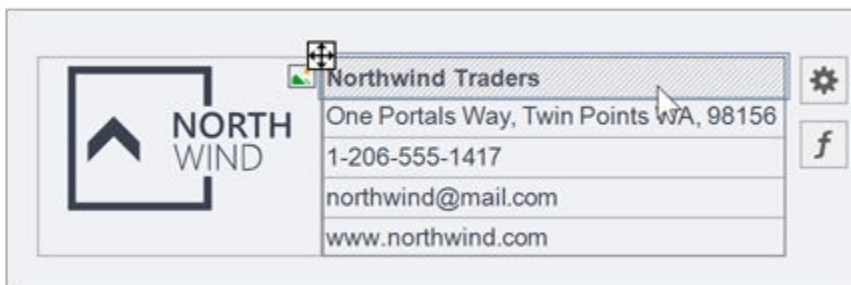
- The Filter Editor's expression input area now uses the monospaced Consolas font for consistency with the user interface of the Expression Editor.



- The intelligent code completion drop-down in the Scripts Tab now displays SVG icons.



- A striped background is applied to hidden report controls whose Visible property is set to false.



<https://docs.devexpress.com/XtraReports/401663/detailed-guide-to-devexpress-reporting/use-report-parameters/cascading-report-parameters#cascading-parameters-filtering-specifics>

<https://docs.devexpress.com/XtraReports/403889/detailed-guide-to-devexpress-reporting/use-expressions/custom-aggregate-functions>

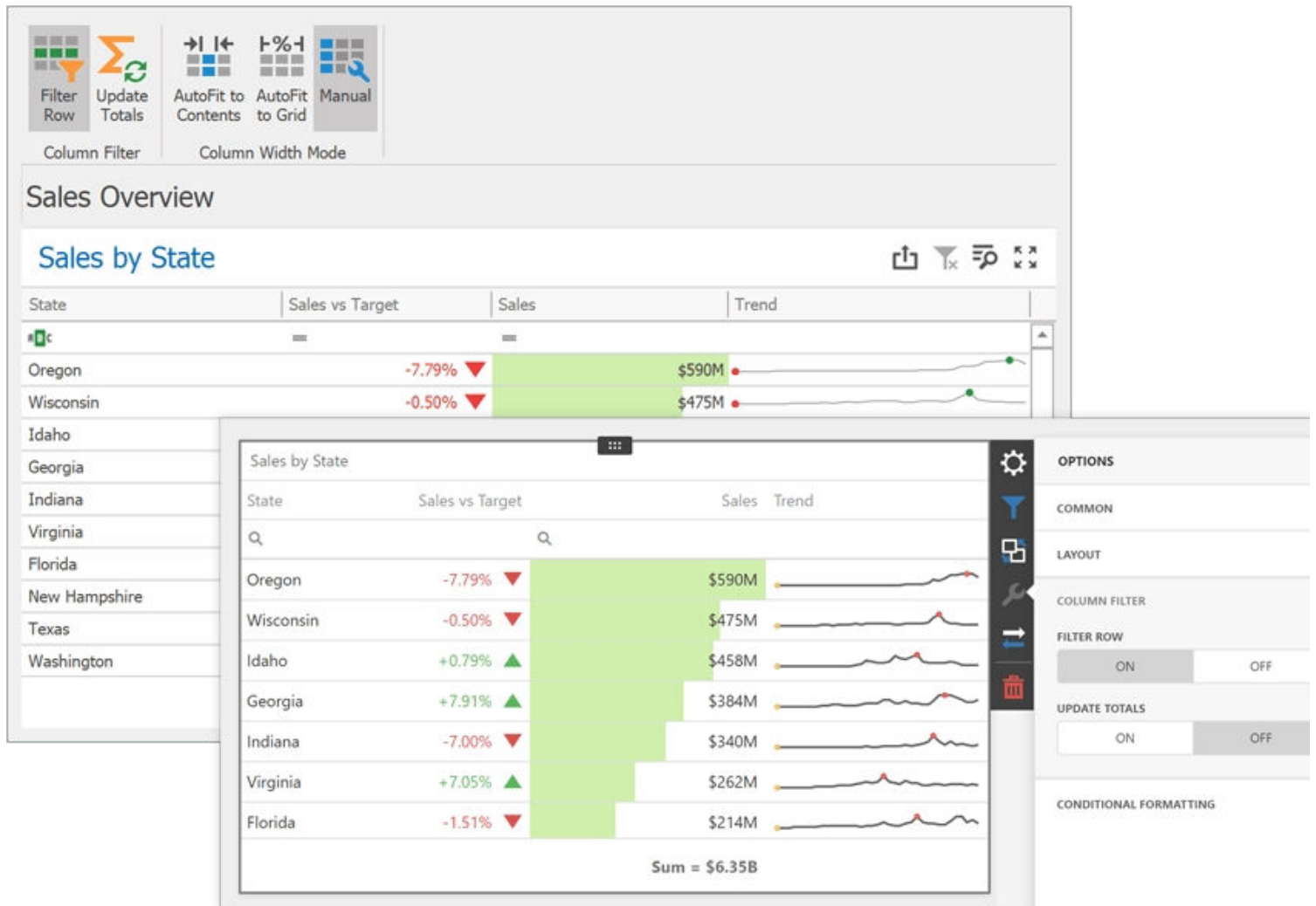
SQL Data Source

You can now bind our `SqlDataSource` component to a stored procedure that returns multiple data tables. You can also view these tables in the Report Designer Field List.

Grid Dashboard Item - Column Filter

Use the 'Filter Row' option to activate grid column filters. Once activated, end-users can search and filter grid rows with ease.

We've also added an 'Update Totals' option. This option determines whether the grid automatically recalculates totals when users filter grid data.



Time Recording

S085256 Budget Indicator Bar – New Feature to look at Profit Costs Billed Plus WIP

New feature within Liberate, to allow firms to budget by profit costs billed rather than time.

Within the Admin Red Globe Options, under Time Recording, there is a new setting, “Budget Indicator Bar – Inclusive of Profit Costs Billed”. If this is NOT ticked, the Budget Indicator Bar will work as normal, looking at Time Incurred. If the option is ticked, the Time Budget Indicator Bar will look at WIP + Profit Costs Billed.

For clarity, the profit costs billed must include at least one time entry to be registered within the budget, whether the time is uplifted, reduced or billed as is. To use the Profit Costs Billed Budget, users will need to ensure the new fields of “Budgeted Profit Costs” and “Profit Costs Tolerance” found on the Matter Record are populated. If these fields are not populated, the budget will not be displayed.

If the “Budget Indicator Bar – Inclusive of Profit Costs Billed” option is not ticked on the Red Globe Option, the system will continue to use the Time Limit and Time Tolerance fields on the Matter Record, and look at time incurred only.

Workflow

S086008 "Suspend all" option added to workflow action type 13

New "suspend all" option added to action type 13 to mark all case workbox entries for the selected workflow suspended irrespective of party or primary data item tagging

Liberate SE Accounts

Autopost

S085172 Submitted Column now correctly populated when additional Approval levels in Autopost are enabled

When the additional Autopost approval levels of Checked and Approved are enabled on a database, the submitting user now displays within the Autopost screen. The relevant 'submitting' and 'Authorising' are now visible within this area.

Billing

S085337 Columns view saved in Review bills area

When columns are added/removed in the review bills area, the column view are retained for the user the next time they open the screen

Liberate SE Licencing Module

General

S085525 Implement Licence Check Logging to Licence Server

Update Licence server with active user counts

Schema

Reporting - Dashboards

S085695 Add missing field for web browser type

alter table biobjects add WebBrowserType varchar(1)

Smart Connect

DMS

S085481A UnifiedWeb (B2C) will retrieve Documents (via SmartConnect) from a Work10 DMS configuration

Continued enhancement to Linetime applications for Work10 Universal API compatibility.

Total number of Features and enhancements : 23

Performance enhancements

Liberate SE

QuickSearch Speed

S085554 Improvements to QuickSearch performance

Schema change to Lookup2 stored procedure to remove sorting on ACMA.MAVERDAT.

Total number of Performance enhancements : 1

Resolved issues

Business Intelligence Dashboard

Billing

S085696 Backdated Bills included in Dashboard Result.

When getting the result set for the report, if the Bill has been backdated it is now picked up and reported on in the correct Period.

General

S082052 Fixed issue with suites with no panels or reports allowed to be created.

Fixes an issue which enabled suites to be saved without any panels. Additionally, deleted suites no longer remain in dashboard allocation. Finally, reports cannot be generated with suites that have no panels.

S081224 Issue when creating a new dashboard panel

Resolves an issue whereby creating a dashboard panel would not save the caption of the dashboard panel. Essentially, the panel was not loading correctly after creating.

Reporting - Dashboards

S085577 Fixed issue when following the context menu link to a bill from a dashboard.

The link is now followed without opening party maintenance.

Email Updater Service

DistributeCaseProperties

S085697 Improvements to Email Updater for distributing Case Information to other Email recipients

When handling Exchange's email modified events generated when an Email is auto-attached or is attached manually, improved logic allows other recipients to receive the associated Case Information.

Liberate A2A Interface

Integration - A2A

S085438A Fixed issue with function not using token code when downloading documents

Fixed issue with function not using token code when downloading documents

Liberate Administration Utility

General

S085350 Fixed issue with Inactive flag reversing value on load of source of introduction.

Source of Introduction Inactive Flag now displays correctly within Liberate Admin and the Active ones can now be chosen from the Matter and Client record within Liberate. The inactive ones are not available to choose with Liberate SE.

S085592 Lower level 135 missing unless accounts license selected

Lower level 135 for the go live button is now available under all account types in user maintenance

Liberate Admin

S085566 Fixed a number of issues relating to the client maintenance form.

1. Invalid data due to data conversion.
2. Not moving to correct tabs on validation when saving the form. Could not see what was incorrect.
3. Removed the grid focus change event that was a duplicate of the mouseclick

Liberate Case Management

General

S085685 Fixed issue when moving a document

Fixed non-chargeable time message appearing when moving a document from one case to another

Liberate Practice Management

Transaction Gateway

S072202 Transaction Gateway reversals spawn negative transactions

When a negative value is imported via transaction gateway (Reversal) then any subsequent commission is also created as a negative value

Liberate SE

Authentication

S085574 Email Updater, improved handling of Office365 Access Tokens.

When configured to use OAuth authentication into Office 365 hosted EWS, specific program conditions could cause the Access Token expiration to be 'missed', failing to trigger a Refresh token call.

Application now caters for (O365) token expiration coinciding with an EWS connection reset.

Billing

S085667 Red Globe Admin Billing Options – Emailing Bills

Update to allow bills to be emailed directly from SE Billing Wizard while using LinetimeDMS

Case History search

S085650 Elastic Search from Case History no longer causes an Error related to Case Code filter

Application now allows the Elasticsearch Page within the Quick Search form to be opened from Case History multiple times without causing an error.

Credit Control

S085450 Fixed issue where bills with zero outstanding amount could appear on the processed screen.

Fixed issue with credit control generating letters for third party bills that are fully paid.

Data Items - Extensibles

S085661 Issue with extensibles where making a selection updates all/multiple entries

Fixed issue with new extensible table type 5 individual item entry creation via workflow failing to create new item but tagging an existing item to the new entry.

Data Manager

S085639 Changes to Destruction Year options

Changed the options on the drop down there is now a Blank and Never Expire. Blank will default to the destruction years set on the matter type, Never Expire will never appear in data manager.

DMS

S085537 Control characters stripped from Email Narrative for Work10 COM connections to prevent Work Web issue.

A new SEVars entry has been introduced to define Work10 COM connections, this allows the system to use a Work 10 specific fix - so that Linebreak characters added to the Narrative do not affect File-handling operations made through the (iManage) Work Web tool.

S086005 Added better checks for existing Workspace when adding Documents to Worksite DMS.

The Worksite Integration logic searches for a Workspace when adding a Document, if one is not located, applicable Folder Methods will create the Workspace.

If a Workspace is not located, it may be that the Operator account doesn't have access permissions, in this instance the Workspace will not be located.

Prior to creating one, a new Search for the Workspace using the DMS Admin account is performed to prevent creation of a Workspace with the same attributes as the existing (security restricted one).

Electronic Payments

S085357 Client Account Transactions – Bank Details for Electronic Payments

Added ability to hard code bank details onto the transaction header. Previously, bank details could only be added via a data item. With this update, users can input specific bank details on the transaction header that will subsequently pull through when raising the transaction, either manually or via workflow.

General

S085621 Spelling error on warning pop up when archiving matter

When attempting to archive a matter the warning for outstanding bills contains a spelling error. This has been fixed

S085597 Conflict Check results

Fixed issue with search results not returning primary address if no address parameters defined in search.

S085984 Review Checked-Out documents at start-up

Fixed potential for application to hang at start-up when the Review Checked-Out documents at start-up is enabled and Wait-Forms are enabled.

S073875 Fixed issue with action type 79 screen display size

Action type 79 screen now displays the data items without having to re-size

S085422 Splitting time on files which are using court Budgets

When time is split then the original matter budgets phases and time segments are reflect in both the original time line and the newly created split time on the file

S085648 Document Production

Resolved issue with background processing of documents not being able to determine current application and user settings in the background thread.

S085360 Teams access to Client Records

Fixed issue (client access) to teams not giving permissions to team members.

S085552 Workflow buttons not working from profile screens

Workflow buttons were not running the workflow assigned when in a profile screen. This has now been resolved and workflows within profile screens now run from both buttons created on a screen and also the workflow icon from the ribbon bar

S079784 Null object reference being caused when switching between dashboards in SE

Resolves an issue where switching between dashboards would produce an object error message.

S081040 Fixed issue with PDF not attaching to Case in Document Router after Preview

After previewing a PDF in Document Router this now attaches to the Case with no issues

S085633 Screen opening on a case causing Liberate to close down

Fixed issue with screens containing formulas that refer to a dataitem linked to the formula in question causing application to terminate

S085631 When running a workflow Application closes

Fixed issue with workflow containing formulas that refer to a dataitem linked to the formula in question causing application to terminate.

S085635 Liberate SE - error received when generating a document from Lead Case which contained MR switch

This has fixed an issue where an error would be produced if the lead case precedent contained an MR switch in the document

S085588 Charge table formula causing application into infinite loop

Issue resolved where a charge table formula causing application to go into loop and eventually timing out and reporting error, Timeout Expired. The timeout period elapsed prior to obtaining a connection from the pool. This may have occurred because all pooled connections were in use and max pool size was reached.

S085652 SE Time review area

Removed redundant UseMatterAlloc column from ACMA and AVMA and removed all reference to them from the code.

General/System

S085744 Parameter 11 performance issues

Fixed issue so check for outstanding disbursements is skipped if parameter 11 is on.

Integration - Making Tax Digital

S085543 Vat issue - getting an invalid refreshtoken error.

Resolved refresh tokens error.

Integrations - DocsCorp CompareDocs

S085641 Changed logic that locates compareDocs

Now checks for existence of install folder and uses first found of

i) "C:\Program Files\DocsCorp\pdfDocs compareDocs"

ii) "C:\Program Files (x86)\DocsCorp\pdfDocs compareDocs"

Marketing

S085990 Marketing Query Builder

Fixed issue with Query Builder values field that could show a list of possible values was not showing the control as a drop-down.

Merging - General

S085665 Data Item not pulling through to precedents

Fixed issue with dataitem or sub dataitem data types not being determined correctly leading to data held in them to be displayed as a number formatted to two decimal points if the data is considered numeric even though data type is defined as any characters.

Missing schema

S085572 Missing schema for ElasticSearch added.

SQL Tables used to hold configuration data for the Elastic Search feature is not in the originally targeted Release Schema revision 808.

Move Workspace

S085684 Workspace Move functionality, Workspace Description update for new Client

The process to Move a Case also updates the corresponding Workspace when using a Worksite enabled Liberate database. This procedure will now update the Workspace Description so that it reflects details of the New client associated with the Case Move.

Processed Bills

S085514 Bills can be emailed without producing Workspace Reference error.

Correction applied to Bill Book, Processed area so that Bill documents stored in a DMS can be emailed. This applies to Worksite DMS using the Workspace Reference link method only.

QuickSearch

S085531 Searching data items from table type 3's

Searching for a data item that is contained in a table type 3 , now brings back the correct results

Reporting - Query Builder

S086023 Error in Quiery builder when loading data items

Fixed issue with SQL truncation error being reported when loading data items in Query Builder.

S085646 Query Builder no longer produces an error when there is a data type of varchar(MAX) in the metadata

An error no longer occurs whe trying to build a query in Query Builder when there is a varchar(MAX) data type field.

Reporting - Suites

S085431 Fixed issue with duplicate reports being shown in favourites

Reports no longer duplicated when added to the favourites area within users reports with report centre.

Search

S085679 Improved connectivity checks when accessing Elasticsearch

Configuration of Elastic Search to use Windows Auth into the Elastic Link database, meant that SQL Permissions were required for Liberate Operators, as the code was over-validating the Elastic configuration defined in SE.

Following this change, the Elastic Link SQL database connection will not be validated by regular Operator logins when loading Elastic Search within the Liberate SE Search form.

Time Recording

S085539 Fixed issues with Time Indicators and Themes.

The time indicators now continue working/updating after a theme change.

The time indicator shown within the Case History/Note form follows the theme.

Worksite Sync

S085619 Improvement to Worksite Sync (History Categories mode) to optimise/add robustness

Improved the logic in Workspace Sync function when comparing Workspace Folders against History Category names.

The Liberate SE Ad-Hoc Document Category create dialog used to allow Category Names that Start With a space character - Folders defined like this were then unable to be correlated back to the Category (logic error), causing an application Hang in some scenarios.

Worksite will not create the Workspace Folder with a space at the start

S085666 Specific sequence of Folder events can cause an error in the (lite-) Workspace Sync.

Improved the logic within the lite-sync (Work10 Change Events) so that it can process certain specific event sequences.

S085541 Correction for connection-handling fault in Worksite Sync affecting specific Folder/Link configuration

Worksite Sync functionality restored after introduction of SQL connection handling issue.

Only affects specific Worksite DMS configuration:

Folder Method: Find Folder By Name

Link Method: Workspace Reference

S085580 Improvement to Worksite Sync when comparing Documents Workspace vs. Case History

Improved comparison of Document references when performing a Workspace Sync - to prevent the (incorrect) soft-deletion of Documents. Triggered when the Worksite Database Name is specified in Admin DMS Options with alternate Casing to the Worksite Database name returned in Universal API requests.

Liberate SE Accounts

Autopost

S085420 Autopost section - clearing 'By' fields after rejection

Resolved issue where the Checked By column in Autopost area was not cleared after rejecting the transaction

S085353 Autopost Selected Total

Update to system to ensure that when selecting multiple client account payment lines, the selected total will calculate negative and positives values correctly. Before this update, the system was showing client account payments (when selecting multiple entries) as negative figures.

Bank Reconciliation

S085545 Bank Reconciliation

Fixed issue whereby attempting to reconcile bankrec items that sum to zero was incorrectly producing a message advising that the sums do not match.

Billing

S085581 SE Billing Write-off Options

Updated the system to ensure the Write Off value within the Red Globe Admin Options is taken into account within Billing Wizard. At present, the system only looks at the write off percentage/realisation.

S077724A Billing Wizard – Editing a Drafted Bill and Amending the Date

When editing a drafted bill within Billing Wizard and changing the date, the system will retain the Profit Cost and Allocation settings. Previously, when changing the date, the profit costs would revert back to the default settings.

S085557 Matter descriptions of 500 characters are reflected in the billing area

Matter descriptions of 500 characters are now reflected in posted bills and displayed on hard copies of bills.

General

S085584 SE Bank Rec - HSBC Bank Link 18

Update to SE Bank Rec, HSBC Bank Link 18. Closing balance check moved to the first line of the Statement Import. Previously the system checked the last line of the statement for the closing balance. However, this was incorrect as the last line is the opening balance.

Purchase Ledger

S085562 Compatability issues with PTTOT and *PLR listing comand

Issues with PTTOT when used with *PLR have been resolved and the PTTOT returns the expected Gross Amount when used on a remittance advice.

Liberate SE Licencing Module

Licencing

S085659 Licencing

In certain scenarios, the concurrent licence count was determining more than one licence use per machine due to initialisation connections not being omitted.

Smart Connect

Smart Connect API

S086007 Improved robustness of Case Search functionality within API

SmartConnect Case Search API better handles data discrepancies which previously may have caused an error, preventing search results being returned to the API consumer.

Unified Web

B2C

S085544 KeyIVR pages added

KeyIVR return page has been added into the payments system for unified web.

B2C Mobile

S085991 Unified Web Changes

The issues listed below have all been resolved.

1. B2C mobile contained a scripting error stopping some items on the homepage being clicked.
2. Case and debt review forms on B2C mobile didn't cover 100% of the screen width.
3. No icon displayed for the progress stage items on Self-Serve when reviewing a case associated with a progress stage.
4. Javascript error (invisible) occurred when viewing the terms & conditions, privacy and copyright on Self-serve and B2C mobile versions.
5. B2C Report generator popped up a message when creating for a new report on "save and run" due to the report ID being encoded twice.

Self-Serve

S085613 Logging into unified wweb when a password change is required

If a password change was required, as the software was trying to update something with an open data reader, an error occurred. This has now been resolved.

Word

Start-up performance

S085675 Word Cache - Background load

The Word Cache functionality can be loaded on Background thread to help application start-up performance.

Total number of Resolved issues : 67

Total number of changes : 91