

Release Notes

Linetime Version: Liberate SE V3.0.299.0

Release Date: 07/01/2022



Linetime

Legal Practice Management Software

07/01/2022

Table of Contents

Features and enhancements	3
Email Updater Service	3
General	3
Liberate SE	3
SE Billing Wizard	3
Worksite Integration	3
Liberate SE Accounts	4
Autopost	4
Electronic Payment	4
Ledger Enquiries	4
Ledger Enquiry	4
Purchase Ledger	4
Schema	5
CaseAccess	5
Performance enhancements	6
Liberate SE	6
Worksite Integration	6
Resolved issues	7
Liberate Administration Utility	7
General	7
Liberate Case Management	7
General	7
Liberate Outlook 2010 Addin	7
Transaction Collaboration	7
Liberate SE	7
General	7
Postings	9
Transactions	9
Liberate SE Accounts	9
Accounts	9
General	9
Ledger Enquiry	10
Ledger Enquiry Drilldown	10
Postings	10
SE Credit Control	10

Features and enhancements

Email Updater Service

General

S083597 | Email Updater Service improvements for efficiency and stability.

- Ensuring the X-Anchor-Mailbox is set on all Requests within a mail-handling Thread has virtually eliminated many of the 'Concurrent connection exceeded' errors that were occurring because the quota for a single user was being exhausted by other connections without the header.
- Improvements for error handling and Connection recovery.
- Improvements when handling multiple Notifications linked to the same Email (multiple recipients)

S083621 | Changes to Email Updater to stop duplicated emails attaching to Case History

Made improvements to Email Updater which identifies if an Email is already saved to the Case History

Liberate SE

SE Billing Wizard

R001019 | SE Billing Wizard - Fee Income Allocation Enhancement

Within the SE Billing Wizard and the Fee Income Allocation Screen, when drafting a bill, users now have the ability to easily re-assign fees, pro-rata, from one or a group of fee earners to another fee earner or group of fee earners. This is useful for say, re-assigning trainee fees. In addition, there is a new option to show and assign fee income to Fee Earners that have been marked as left. All fee earners marked as left will be shown in red within the allocation grid.

Worksite Integration

S084828 | Introduction of Events-based Worksite Sync (Work10 REST v2 API)

Work10 REST v2 API exposes a Resource which captures all Events that have affected a Work10 Workspace. This includes the addition/removal of Documents and Folders (security also etc.)

A Queue mechanism is provided also allow positional tracking within this Events Store. Work10 CLOUD also captures the App ID (an identifier detailing which Application triggered the change).

We can therefore use this to provide a light Sync routine.

Instead of having to validate every Document in the Workspace against Case History, we can obtain events that have happened, filtered by Workspace, excluding our own application - to provide a concise set of actions which have occurred from other Work 10 applications.

Because the Change-Events store is held for a configurable Number of days in the Worksite Database (Default 7), a Setting will be required in the Liberate Database so the system knows it can leverage this Resource.

A WorksiteWorkspaceSync record, will need to be dated within the Last N Days to enable this functionality, otherwise the operator will be prompted to perform a Full Sync.

Liberate SE Accounts

Autopost

S084737 | New Field within SE Autopost – Bank 2

A new field has been added to SE Autopost, entitled Bank 2. This will display the Client Bank for any Client to Office Transfers and the Client Bank To, for any Client to Client Transfers. There is already a Bank field within Autopost that displays the Office Bank on Client to Office Transfers and Client Bank From for Client to Client Transfers.

Electronic Payment

S084839 | Electronic Payments – New Faster Payment Export For Bank Link 8 (NatWest/RBS/Ulster Bank)

An update has been made to the Electronic Payments Module, enabling users to export client account and purchase ledger faster payment files for bank link 8 (NatWest/RBS/Ulster Bank). Functionality is already present on bank link 8 for CHAPS and BACS payments.

Ledger Enquiries

S082746 | New option within SE Ledger Enquiries to allow users to sum columns in the ledger

System enhancement within SE Ledger Enquiries, that allows users to input an overall total beneath specified columns. Users can enable the "Totals Footer" within SE Ledger Enquiries by right clicking over any column and pressing "Show Footer". Then subsequently right clicking on the footer, beneath the required column, and choosing either Sum, Min, Max, Count or Average.

The enhancement is available within the Financials Transaction TAB and Time Transactions TAB.

Ledger Enquiry

S084846 | Ledger Enquiries - Unallocated Receipts Ledger View

When viewing unallocated receipts in ledger enquiries previous versions only showed the original posting amount, which may not be the value currently unallocated. This meant that drilling into the unallocated receipt balance from the financial tab could itemise postings that did not tie back to the value shown on the financial tab. A new column has been added to this view, to show the value unallocated.

Purchase Ledger

S084919 | SE Purchase Ledger - Cancellation of Payments set up to be paid via Electronic Payments Module

SE purchase ledger will not allow a supplier payment, set up to be paid via electronic payments to be cancelled so long as the payment has not been imported into the electronic payments module or payment made. After the posting has been imported, it is still possible to cancel so long as the payment is updated to 'Rejected' status in the electronic payment module.

Once reconciled it will not be possible to cancel the payment at all.

Schema

CaseAccess

S084946 | N/A New functionality/implementation

The Worksite To Liberate package within the Information Barriers project will not run without the InformationBarriers table being present in the (Destination) Liberate database.

Performance enhancements

Liberate SE

Worksite Integration

S084827 | Improvements to the Worksite Sync function when sync'ing a large Workspace Folder

Improved the worksite sync function, especially when sync'ing a large number of items from the Workspace Folder in the Liberate Case History

Resolved issues

Liberate Administration Utility

General

S076755 | Fee Earner and SI Type are no longer available to select in column chooser

When in Info File Maintenance and Activity when you select Column Chooser you no longer have access to the Fee Earner and SI Type Column however they are still visible in the create screen. This has passed Testing

S084098 | The Inactive Column in Information File Maintenance displays a value for Source of Introduction

The Inactive Column in Information File Maintenance displays a value for Source of Introduction

Liberate Case Management

General

S083439 | InfoTrack Service could create multiple reminders for same item

When the InfoTrack service creates a Liberate reminder against a history item, any existing reminder against the same item is first deleted. This ensures only one reminder per history item exists and prevents an error potentially occurring when opening the history/note window.

S084953 | Optima bespoke mStore integration tool

AK 10/12/21 : Added call to bespoke MSLTLINK component for PACTs "MST", "EOM" & "EIM" on ZO licence.

Liberate Outlook 2010 Addin

Transaction Collaboration

S084870 | Rejected Level Transaction Collaboration

Update to collaborations for rejected transactions. From within the Outlook Addin Module, the system now displays the Collaboration Description, Client/Matter Code, Matter Description, Value and Payee for rejected transactions. In addition, when right clicking over a collaboration in Outlook and pressing Open, the system takes the user into Autopost or Billing Wizard, dependant upon the transaction type.

Liberate SE

General

S079867 | Moving a Note/Time entry from Command Level to a Case the Time is added the Date created

When moving Note/Time to a Case from 'My Notes' tab the Date the Time is added to the Case the Date created

S081037 | Quotes going live not retaining new case description

Description on a New Quote retains when you send this quote 'Live'.

S084016 | Introduction of the 'Team' Structure within Client Access.

Team Structure is apparent within Case Properties - Client Access Tab.

S084426 | There is a way to create a client even if the user does not have the "Add Clients" low level permission (107)

New Client option is not available within quotes when lower level permission 107 is deselected.

S084634 | Auto Filter Row now remaining when selecting Key Dates

When selecting 'Key Dates Only' in the Case Status at command level and clicking on Refresh the Auto Filter Row is now remaining rather than having to untick and retick the box to refresh. This has now testing okay.

S084868 | Status Description displaying incorrectly

Fixed issue with case status merge codes not being share level aware.

S084920 | Suppress special parties from table type 4 control drop-downs.

Suppress special parties from table type 4 control drop-downs.

S084922 | <ACMA.USEMATTERBUDGETS> is not working in workflow - this has never worked in previous sprints.

<ACMA.USEMATTERBUDGETS> is available in the Client/Case dropdown in Liberate Administration Utility. The description is 'Use Matter Budgets'

S084923 | Fixed issue with linked extensible screen control displaying data in incorrect columns

Fixed issue with linked extensible screen control displaying data in incorrect columns

S084924 | Unable to delete an extensible TT5 data item from the table.

Fixed issue with inability to delete a table type 5 extensible row.

S084926 | Unable to Post any Time from the Holding area - receive error message: String or binary data would be truncated. The statement has been terminated.

AK 25/11/21 : Code change to fix error if posting time for a cascode longer than 8 characters.

S084938 | Fixed issue with liberate options and exit button in the command level application menu showing as incorrect size and alignment.

Fixed issue with liberate options and exit button in the command level application menu showing as incorrect size and alignment.

S084955 | Incorrect case code format when using portfolio case replication with prefix case numbering

Fixed to issue with the case code for portfolio cases created via portfolio case replication wizard truncating the plot number of the case code element when using case code prefixes.

S084973 | Restricted Case Access

Fixed issue with setting a case to be restricted still allow all users to gain entry to the case.

S084981 | Fixed several issues with Document Bundling

- Fixed error that would occur when deleting a Brief Item or section from a Brief.
- Fixed error that would occur when attaching a generated PDF to Case history.
- Fixed error that would occur when re-opening a PDF that has been attached to case history already.
- Prevent prompt for reload during automatic Brief reload following an item deletion.
- Fixed Sectionise feature when documents in sub-categories are included in the Brief.
- Added Update option to "Remove all sections"
- User can now edit the "Level" property of each Brief item, dictating the amount of indentation to use in ToC and Bookmarks.
- Fixed issue where ToC hyperlinks weren't added for items that are not bookmarked due to being at a higher "Level" than the "Bookmark to Level" value.

Postings

S084565 | Liberate payment screen layout

'Requested by' preceeds 'Payee' in the postings area to ensure consistency.

Transactions

S084287 | Transaction Balance client to office and office receipts

The overall unallocated balance now reduces in the posting transactions screen in accordance with amount being allocated

Liberate SE Accounts

Accounts

S084936 | Client to Disbursement postings in client to office day book

In the Client to Office day book the Client to Disbursement posting is now showing correctly with bank account number listed for office and client.

General

S081159 | Issue with the zero saving on the bank screen in bank reconciliation

AK : Code change to cater for leading zeros in account number for all banks.

S084859 | SE Ledger enquires Inactive matter types -now showing description

Inactive matter types now display description rather than showing as blank

S084871 | Incorrect tooltips appearing in Red Globe Admin Options for Credit Control

AK 01/11/21 : Tooltips corrected.

S084941 | *DVG billing wizard listing command isn't populating the header row if there aren't any 'non admin' charges are on the bill

Excluded from release notes, this listing command is very enact specific.

Ledger Enquiry

S084845 | Billed time showing even if this has been credit noted

[14.10.21 VB] The problem was the SQL was not picking it the latest ACTS status. It was simply looking for all Status 2. Amended the SQL to only pick up the last status 2 of each transaction. Fixed values for "Value Billed YTD" and " Time Billed This period"

Ledger Enquiry Drilldown

S084854 | Ledger Enquiries - "Anticipated Disb Billed" Drill Down

Update to the system, in that when double clicking on the "Anticipated Disb Billed" value from SE Ledger Enquiries Summary Screen, the system takes the users to the correct ledger view, showing Anticipated Disb Billed. Previously, it took the user to the Anticipated Disbs view, that showed all anticipated disbs.

Postings

S084908 | New sites converted data bills with converted pkeys

When sites are converted into Liberate from a legacy system as part of the conversion process pkeys for bills are populated into the converted pkey table these were causing issue for the ledger balance not matching the outstanding bills totals

This has now been fixed and convertedPKEYS on bills are now displaying correctly on ledgers

SE Credit Control

S084877 | SE Credit Control – Instalment Plan Rounding

Update to the SE Credit Control Module in relation to Instalments plan by Number of Payments, rather than Value. When creating an instalment plan by number of payments, and the amount outstanding is not divisible by the number of payments, the system will place the rounding £0.01 on a separate instalment line.