Release Notes

Linetime Version: Liberate SE V4.1

Release Date: 13/05/2022

Linetime

Legal Practice Management Software

19/05/2022

Table of Contents

Features and enhancements 4

Data Manager **4**
General 4
Liberate Administration Utility **4**
General 4
Liberate SE **4**
DMS 4
Document Management 4
Worksite Integration 4
Liberate SE Accounts **5**
General 5
Purchase Ledger 5
Schema **5**
General 5

Performance enhancements 6

Liberate Outlook 2010 Addin **6**
Emails 6
Liberate SE **6**
Autopost 6
Case Progress 6
General 6
QuickSearch 6
Workflow 7
Workflow and Merging 7

Resolved issues 8

Any Other **8**
Worksite Integration 8
E-SDLT **8**
Liberate services (SDLT) 8
Liberate Administration Utility **9**
General 9
Liberate SE **10**
Case Progress 10
DMS 10
Document Bundling 10
General 10
Purchase Ledger Invoice 10
Ribbon Customisations 10

Liberate SE Accounts **11**
Autopost 11
Billing 11
General 11
Ledger Enquiry Time Listing 11
Postings 11
Purchase Ledger Payments 12
Schema **12**
General 12
Unified Web **12**
General 12

Features and enhancements

Data Manager

General

S084943 | Accessing data manager in Admin

When accessing data manager in Admin from other porograms, the user asking for data manager no longer needs to have a designers licence to be able to use Admin.

Liberate Administration Utility

General

S084957 | Linked From in Workflow

The linked from tab now correctly shows workflows from other share levels other than the current case type.

Liberate SE

DMS

S081727 | Work 10 Compatibility

Introduced compatibility with Work10 Server REST v2 API.

Document Management

S084033 | Enhanced level of control granted to users concerning editing of documents and history narratives.

Added two new user level permissions:
"Allow History Document Edit": Controls whether documents in history can be edited directly, without creating new versions. Ignored if User Setting “Change Notes” is disabled.
"Allow History Note Edit": Controls whether history notes/narratives can be edited. Ignored if User Setting “Change Notes” is disabled.

Worksite Integration

S084826 | Introduction of Work10 (REST v2 API) compatible Worksite-Sync (Full Sync v9.X equivalent)

The Worksite Sync feature has been replicated within the Work10 integration.

Liberate SE Accounts

General

S084906 | Ledger Enquiries - Recharges

A Recharge column is now available within the disbursement views of ledger enquiries (via column chooser) to indicate whether a disbursement has been flagged as a recharge.

Purchase Ledger

S084937 | Purchase Ledger Electronic Payments

The payment status of purchase ledger payments that link to the electronic payment function have been updated to show the true status, rather than a numeric ID value.

Schema

General

S085027 | Schema alteration to fix schema length error in unified web products

See schema D

Performance enhancements

Liberate Outlook 2010 Addin

Emails

S085072 | Performance Optimisation when saving emails to SQL databases.

Disabled the user property sync that is done when saving MSG items to improve speed of filing emails. Syncing the all user properties is not necessary for base functionality to continue working.
A new Admin option has been added to re-enable this if required.

Liberate SE

Autopost

S085078 | AutoPost Performance

The AutoPost area has had a performance review in order to speed up the returning of results in the transaction grid. Indexes have been added to the search table.

Case Progress

S084929 | Performance enhancement to the Case Progress Screen save.

The way a Case Progress Screen is saved has been optimised to handle Case Progress Screens with large numbers of Screen Items. The level of improvement experienced will increase the larger the Case Progress Screen is.

This change can be disabled by adding ZO DisableBulkProgressScreenSaveMethod = 84929999 (reverts to the previous method)

General

S085071 | Parties Pane open in minimise tab on case save

The Parties Pane will load minimise tab on case save. setting can be amended if required

S085106 | Performance enhancements surrounding a Case Load.

- Initialisiation of MTClass (Case record)
- Refresh of LastUsed Lists limited to when needed.
- Debug Mode Initialisation limited to when needed (CTRL+D)
- Merging initialisation for Case session and Workflow.
- A change to speed up how controls with data changes validate when saving a Case.

QuickSearch

S085117 | Improved performance of "Cases with party attached" in QuickSearch.

Optimised partycasesearch stored procedure. This executes when in the QuickSearch and listing Cases to which the selected party is related.
The stored procedure has been greatly simplified, with sections relating to legacy data removed.

Workflow

S085111 | Improvements to Action Type 20 (Set Data Item).

- Introduced a cache to store schema info for fields when processed by an action type 20, saving reading the database each time.
- Optimised SQL that initialises a Workflow and reduced total number of individual reads.
- Introduced "Performance" debug mode for workflow to track duration and user wait time.

Workflow and Merging

S085112 | Improvements to the merging routines that process merge codes.

- Combined database reads where possible and reduced number of reads by storing more data globally
- No longer reads to check for linked case codes unless the merge string contains a linked case reference.
- No longer reads to check for portfolio case codes unless the merge string contains a linked portfolio case reference.
- Introduced a data cache in the Merging layer to improve performance, primarily for workflow processing. Options in Admin->Performance can set the cache lifetime, as well as disable it.

Resolved issues

Any Other

Worksite Integration

S085008 | WorksiteCOM64Bridge tool broken since LiberateWorksite.DLL v1.0.111.0 - parameter for v111 change being handled incorrectly leading to a parameter mismatch and code failure.

Requires a Liberate Classic installation interacting with Worksite via the WorksiteCOM64Bridge (Admin DMS Options).
Requires a 64Bit MS Office installation.
Requires a 64Bit Worksite COM installation.
Send a Document History (File to DMS Worksite) via Librate Classic, Document Production [WP]

E-SDLT

Liberate services (SDLT)

S084959 | Citrix Users are unable to submit to SDLT

[10.12.21 VB] the SDLT submission tries to create an XML file to save to history. It uses the windows special temp working directory. The problem here is the code tries to account for folders which ends with a \ and if its a UNC path, then it incorrectly adds 1 too many \.

Ammended the code to check for existence of \ at the end of the folder and only add it required.
This file is only used for saving the XML to history and not actually used for the submission. Amended the code to carry on submiiting even if the file save fails.

Also added another level of saving the file, if the specail folder fails to write, then it tries again with the ZZ.wloc (users work location).

Autopost has a similar problem when producing a transaction summary report, applied the same code logic there too.

Liberate Administration Utility

General

S084900A | Issue with replicating users and disassociating the source user in .net User Maintenance - Linked to S084900A

I believe this issue is simply left over bad data from before previous fixes.

Please run the following SQL to unlink all the users and fee earners.

update zz set felink=''
update fe set zzlink=''

Relink them in the usual way.

I cannot duplicate this issue.

If the log fails again, please DEMONSTRATE it over teams so that I can see the exact recreation steps.

Liberate SE

Case Progress

S085132 | Increased Screen Description in stored procedure spGetCasesProgression to 60 characters to match schema.

This fix removes an error in the Case Status view when a constituent Case Progress Screen had a description larger than 50 characters.

DMS

S085080 | Incorrect error code being returned from operation. Worksite, GetDocument, Profile CopyDocument permission unavailable.

AK 22/03/22 : Code change to return correct error code if permissions denied.

Document Bundling

S085133 | Briefs view now limits bundles to the current Case.

Briefs view now limits bundles to the current Case.

General

S084368 | Company Maintenance - Warning message

Any warning message set within the Company Maintenance area will display when users attempt to log in to the system.

S085066 | Client Record - Billing Email addresses

The character length of the billing email addresses on the client record have been extended to 200.

S085107 | Performance Enhancement

Reuse real-time input form within workflow to reduce wait time experience when showing multiple real-time input forms.

Purchase Ledger Invoice

S084399 | Editing draft purchase invoices - branch

When editing draft purchase invoices, specifically the branch, the name and number are now correctly saved at the point of entry.

Ribbon Customisations

S085152 | The "Command Centre Designer" ribbon page group is now correctly affected by ribbon customisations.

Fixed issue where the "Command Centre Designer" ribbon page group could not be made visible using ribbon customisations.

Liberate SE Accounts

Autopost

S081311 | Posting Office Credit balances - Transaction Request

If the parameter to allow office credit balances is enabled, when posting transactions via AutoPost, the user will be warned if the posting will put the office balance in credit and by how much.

Billing

S084858 | Fixed issue where the bill status record was not written when rejecting a bill or statement

Fixed issue where the bill status record was not written when rejecting a bill or statement

General

S085075 | Review Statements - Disbursements

Fixed an issue whereby the disbursements value was not correctly being displayed on draft statements in the review area.

S085119 | Purchase Ledger - Hybrid Invoices

Incurring anticipated disbursements via Hybrid Invoice posting now correctly resets the net and vat boxe after confirming the invoice line to allow the user to post further entries if required.

S083852 | Postings - Bills Delivered - Date Filter on Time Transactions

The date filter witin the time item selection of Postings - Bills Delivered has been fixed to ensure the date range specified is obeyed.

S084988 | Matter Ledger Print - Time Transactions

Minor improvements have been made to the format of the time transactions grid within the matter ledger print.

S085116 | Review Bills - Bill Notes

Fixed an issue whereby the review bills screen would error if bill notes were attached to bills and statements of the same number.

Ledger Enquiry Time Listing

S078237 | Time Ledger - Bill Number

The bill number attached to posted time records within time ledger views will reflect the true bill number rather than draft bill number.

Postings

S078625 | Credit Notes - Draft bill number setting

If draft bill numbers are in use for bill references, the same reference will be used in the ledger description should the bill be subsequently credit noted.

Purchase Ledger Payments

S084994 | Purchase Ledger Payments - bulk processing

Performance improvements has been made when posting large numbers of purchase ledger payments simultaneously. This ensure the system does not hang or present time out warnings to the user.

S082326 | Issue reconciling unallocated payment against a direct debit invoice in SE purchase ledger

[02.09.21 VB] The fault lies with the SQL to find the transactions for the payments screen. When Direct Debit is selected as the Payment Method, its only looking for transaction types 51 and 52 (Invoice and Credit Notes), Unallocated is type 55.
If "Invoice Payments" payment method is selected, it looks for 51, 52, 55 and 56 (56 is Unallocated Receipts). Amended the SQL so when Direct debits is selected, it looks for the same transaction types as "Invoice Payments" which is 51, 52, 55 and 56
[08.04.22 VB] The logic works when payment method is set for cheques. As per TS suggestion, the same lodic is applied for Direct debits. Also, there was a bug in Direct debtis where PL postings has a status 5, but disb transactions is set to 1. Amened the code so for DD, both PL and disbs transactions is set to 5 for consisitency
[26.04.22 VB]Further fixes to counsel fees and unpaid disbs appearing in direct debit payment method
[17.05.22 VB] fixed the 2 items that previously failed, but need further investing with point C.

S085016 | Purchase Ledger Payments - Duplicates

Should two users have the Purchase Ledger Payments screen open simultaneously and attempt to submit the same payments, the second user will be warned that one or more payments have already been posted and the duplicate payment will not proceed.

Schema

General

S085004 | Field missing from schema - webimages.mobilefriendly

alter table webimages add mobilefriendly bit

Unified Web

General

S078345 | Further testing and observations on the unified version of B2C

Multiple fixes to the new unified version of B2C found during testing.