Release Notes

Linetime Version: Liberate SE V4.2

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Linetime

Legal Practice Management Software

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Features and enhancements

B2C Admin Utility

General

S085070 BI Credentials

BI Credentials tab no longer appears on web user maintenance

Business Intelligence Dashboard

Reporting - Query Builder

S085128 Added reporting view for time transactions

Added a single view to cater for both requirements: vw_TimeTrans. This is now available in new reporting.

Data Manager

Data Deletion

S085053 History delete

On the History deletion tab, when a selected item fails to delete, its updated with the reason why it fails to delete. However, its selected status remains in the background so when the user next opens the History tab, and selects different items to delete, the previously failed history item tries to be deleted again.

Amended the code to only attempt to delete the currently selected item and ignore the previously failed items.

Liberate A2A Interface

Integration - A2A

S082374B Release 7

A2A integration now works with release 7 of the A2A technical specification

Liberate Administration Utility

General

S084916 Electronic Payments Module - New User Maintenance

Electronic Payment security options are now available within the New User Maintenance module.

S085043 Info File Maintenance

Inceased SAR breaches description field to now allow upto 250 characters

S085045 <ACMA.MACREDIT> added into workflow and formulae

The merge code <ACMA.MACREDIT> is now available to select within workflow and formulae

S085351 B2C - Allow the statistics homepage menu to be visible based upon the user permissions (Unified Web Only)

A new user permission is available when editing the B2C user details to determine whether statistics are visible to the logged on user.

Liberate Outlook 2010 Addin

Outlook Add-in

S081645 Added Admin option to force Garbage Collection on MailItem close.

When set to “Y”, the Add-in will force the .NET Garbage Collector to clear de-referenced objects. This more quickly frees up object references to Mail items, solving locked file issues when opening the same item multiple times in quick succession.

Switch to “Y” to minimise memory footprint and free-up object references

Switch to “N” if the Add-in hangs when Mail windows are closed.

User Interface

S084934 History TaskPane and Reading pane interactions removed.

Opening/Closing the History TaskPane will not change the visibility of the Reading pane.

Liberate Practice Management

General

S085134 Nominal Posting - Default VAT rate

If a nominal code is assigned a default vat rate via nominal code maintenance, then that VAT rate will be presented as the default when a nominal payment/receipt is entered by the user. The VAT rate can of course be changed at the point of posting.

Liberate SE

Bank Reconciliation

S085218 Fixed reset layout button to show grids if missing.

Also fixed errors pressing space if nothing in the grids and clicking Clear Selection if nothing in the grids.

Case Screens

S084939 Fix issue to allow 12 digit numbers in TT3 and TT5

For Table Type 3 and Table Type 5, users can now enter 12 digits including the 2 decimal places and decimal point, where line is defined as a 'number'.
This is consistent with a standard data item defined as a number.

Client Connect Desktop

S085343 Expiry Message in Client Connect Output

Added ability to specify the message displayed to users of client connect if link has expired.

InfoTrack

S084883 Added Lot Number as a mappable field.

The outgoing InfoTrack send can now include liberate data mapped to the "Lot Number" of address records.

Integration - SDLT

S083133 Added support for Freeport introduction

New schema.xsd added for SDLT validation to facilitate Freeport introduction

Integration - Worksite 9.x (COM)

S085398 Document check out status

When evaluating the checked out status of a document, the system was not checking if the user had switched machines since they checked the document out. This could lead to the system trying to re-open the checked out file, but not warning the user when it could not find it on the current machine. These checks have been improved and user messages added.

Reporting - Query Builder

S085217 Added ability to report on Statement Email Status and Sent Date

Added view "vwStatementEmailStatus" and corresponding reporting metadata.

Worksite Sync

S085390 Work10 Workspace Sync

Work10 Sync can now handle Workspace Folder structures which utilise Tabbed Folders.

Liberate SE Accounts

Aged Bills

S084872 Client/Matter Ledger Enquiries - Other Tab

Within the Other Tab of Ledger Enquiries users can now access a client and matter level view of Aged Bills for that client or matter.

General

S085079 New functionality for emailing bills

New Red Globe Admin options available in the Billing area where you can specify the information to be included in the Attachment Name of a bill when emailing from the Review Bills area. The new options available are 'Bill Date', 'Full Matter Code', 'Case Code' and 'Bill Number'.
Radio buttons also available to specify the priority of the email, the options are 'Low', 'Normal' or 'High'.
These options apply to emailing bills from Review Bills and emailing Statements from Review Statements.
You are now also able to email a bill or a statement multiple times if necessary - if a bill/statement has alreay been emailed, a warning message appears advising and asking if you want to continue.

S085195 Multi Matter Statements - Post and Date Today

The 'Post and Date Today' function has now been introduced to multi matter statements by right clicking on the statement prior to posting.

Unified Web

Client Connect

S084990 CRM and Client Connect has been added to the new Unified Web Product

There is a new web share

https://b2c.linetime.co.uk/unifiedweb11

that is setup to be client connect.

It is looking at selibtest.

Please ensure that your links in the client connect emails are going to URL above.

Voyager

General

S069651 Enhanced document versioning

Smart connect check-in is now compatible with enhanced document versioning

Total number of Features and enhancements : 24

Performance enhancements

Liberate SE

General

S085342 Outlook Addin Last Used List

There is a new Liberate Red Globe Admin Option, under the Performance tab, to “Auto Refresh Last Used Lists on Case Load”. If this option is ticked, when loading a case, the last used list within the Outlook Addin will update automatically for all users. If the option is unticked, users will need to press the Refresh MRU List within the Liberate TAB in Outlook to update the last used list.

QuickSearch

S085302 Data Item Search Speed Improvement

Modifications made to search area to improved search result times.

S085250 Further performance improvement to Party Search.

Further performance improvement to the PartyCaseSearch stored procedure to prevent bad cached execution plans.

User-defined screens

S077219 Screen Drawing Optimisation

Consolidate screen drawing routines for screens in case maintenance, workflow pop up screens and workflow real-time inputs.

Total number of Performance enhancements : 4

Resolved issues

Business Intelligence Dashboard

Dashboards

S082046 Dashboards: Fixed mousecursor state when switching dashboards in a suite.

Dashboards: Fixed mousecursor state when switching dashboards in a suite.

Reporting - Query Builder

S085395 Was just doing some final checking on the data that comes through and I have noticed that the unpaid bills amount on the Live Files tab is not consistent with the actual outstanding debt. Can you have a look at your end and let me know what changes I need to apply to get it feeding through properly?

AK 08/08/22 : Schema change to exclude credit noted and written off bills from view. Also fixed incorrect join to ACMV which was causing some amounts to double up.

Client Connect

General

S085139 Opting out of a campain doesn't update the declined field in CampaignPartyLink

The first change is to admin.

Adding a Client connect workflow item no longer has an option to select a data item for a negative response.

The second change is in client connect.

When the negative response link is clicked then the campain is now declined.

Client Take On

General

S084875 Client Import now updating the Client/Office Banks on the properties tab

When creating Client's through Client Import the Client/Office Banks on the properties tab are updating with the correct mapped field.

Email Updater Service

Recovery

S085328 Email Updater - post-Error recovery

The Email Updater has recently started receiving errors from the EWS Exchange service which have considerably reduced in detail.
"At least one subscription error occurred"

Following this error event, the Email Updater Service has not been able to recover and reconnect to a new set of EWS subscriptions to allow it to continue monitoring Email-related events.

The new recovery strategy in v55 allows the Service to reconnect to EWS as soon as it is available again from the Exchange server.

Liberate Administration Utility

General

S084909 Error found within New User Maintenance when clicking on an existing user after applying the licence for new user maintenance

Corrected the error that occurred if an accounts user was reloaded in new user maintenance.

S084983 Spelling Error in Transaction Type Maintenance Tool Tip

Tooltip spelling error now rectified against the re-charge checkbox.

S084917 When selected a module component in a role and assigning that role to a user, SE User Maintenance is also inserting the lower level permission with the same number into the ZU table for that user.

When a user is saved with a role without ZUs, no ZU are created.

Additionally, if a role is modified that is assigned to a user, the user no longer receives the ZUs

Please bear in mind that EVERY user with the new licencing must be loaded and saved again in new user maintenance to make sure that all the permissions have been written correctly.

S084915 Lower Level Permissions conflicting eachother in New User Maintenance when one role has a permission selected and another does not, but both roles are assigned to a user.

This wasn't a clash of Roles but an issue with how the information was written back to ZU.

It has already been fixed for S084917 and requires no further programming.

If you look at the ZU's for GEMMAC you will see that 15 is now in there.

Liberate Case Management

General

S084310 Default Contact Items

Fixed issue with default contact item types not being selected on client party when creating a client via new client inception and when using custom party types.

Liberate Marketing

Campaigns

S084411 Phone Numbers in Campaign List

Phone number added via column chooser in campaign list in marketing. This will display either the home, business or mobile number held on the party.

Liberate Outlook 2010 Addin

DMS

S085396 DMS Data accuracy.

Draft Email attach to Case can cause incorrect Document tracking data to be created.

Liberate SE

Autopost

S085364 Fixed issue with Auopost search if Case Descriptions larger than 200

Increased the column for case description in the temp table to match the length of the case description column in MT i.e. to 500 characters.

S085257 Autopost Grid - Totals

Fixed an issue whereby the selected total in the Autopost grid did not update in real time with the transaction items selected.

Billing

S085341 Billing Wizard Vat Rate fix

Fixed issue with default Vat Rate not pulling through correctly if not set on the client

S084950 Billing Realisation Tolerance

The billing realisation tolerances are still obeyed on bills raised where the profit costs value is 0.00, yet may include chargeable WIP items.

Case Parties

S084931 Party Members

In the Client Members tab in the Party Pane on a Case, it now only shows party members in the category they are attach or as uncategorised.

Case Screens

S079025 Fixed error when closing down Case Properties window

Error message when closing down Properties window has been fixed

S079605 Table Type 1 Sequence Numbers

Fixed issue with table type one entry added via data item control on case screen was not adding the sequence number for table defined as using sequence numbers.

S084962 Linked Extensible Relationship Button

Fixed issue with relationship button visbile in toolstrip when control has not been populated with any data.

Case/Client Privacy

S085230 Fixed fault that would occur when saving a screen that contained Ad-Hoc screen items.

Case Progress Screens: Fixed fault that would occur when saving a screen that contained Ad-Hoc screen items.

S081352 Progress Screens no longer showing in Quote Cases

When a Quote case is created if that case type has a Progress Screen this is not visible from the Quote case

Client/Party Maintenance

S081483 Can no longer have cyclic relationships when adding Party Members

Cannot add a Party as a member to a Party if that Party is already a member on the Party record.

S082662 Multi Category Attachment of Parties.

Added ability to allow a party to be attcahed to a client or case via the attached party wizard uder multiple categories at the same time.

S085123 Fixed issuue creating a new party when using Party level assessments system option

When creating a new party you are now able to search the party under new client as an entry has been put against the party for a blank category.

Credit Control

S084282 Credit Control Processing - Matter Filters

Fixed an issue whereby the filters at matter level (department, matter type etc.) were not being applied to the processing of credit control items.

S084540 Credit Control Statements no longer include credit noted values on multi matter bills

Credit Control statements no longer include the credited amount of multi matter bills in listing commands.

S084965 Credit Control Status Report

Fixed an issue in the Credit Control Status Report whereby matters were incorrectly being displayed as 'Passed to Debt Recovery' despite having no such status.

DMS

S085210 Document Move fault

Prevent a Workspace Folder-related error while handling Document Folder references during a Document Move operation.

General

S085234 Fixed issue with scroll bar disappearing within the Parties Pane on a case

The scroll bar within the Parties Pane in a case no longer disappears when the contents get too big.

S085273 Fixed issue when merging a Party Precedent containing a UR switch

No longer get an error message when loading Party Precedents that contain a UR switch merge code.

S080529 Fixed issue with attaching Parties

When a Client Party/Lead Contact is selected in the Parties Pane a new Party can be added via the Attach Party Wizard option

S084856 Data Item Auditing

Fixed issue with data item auditing not visible when using new licencing.

S085025 Data Item Auditing

Fixed issue with auditable data items linked to case progress items not adding an entry into the audit table when updated via the case progress screen.

S085060 Contact Us Screen Label Change

The 'Contact Us Screen' on the application tab in client maintenance has been changed to reflect the true nature of the screen to be shown and so now read as 'General Enquiries Screen'.

S085121 Case Watchers

Fixed issue with no option to watch items added to history that are either uncategorised or categorised under a system category.

S085270 Parties Pane stays pinned when the pin icon has been selected

When the Parties Pane has been pinned that stays pinned when opening the Case

S085091 Issue when using the convert option on a history file note.

When using the Convert on a file note within a case to change the note to a precedent on the history was previously throwing an error when document versioning was in use. This has now been rectified and file notes can now be converted and stored successfully.

History Categories

S085245 Fixed issue dragging history categories around.

The system now prevents the user from dragging an Adhoc history category onto one of it's child categories. This prevents the category from goes missing.

History Filters

S085115 EML/MSG Filtering within Case History

Emails can now be filtered by an additional Type, Exchange Email In/Exchange Email Out

Integration - Loqate

S078674 Issue with Loqate removing County field

County field is removed from address fields only when searching with Loqate and the County is not returned/formed as part of the address found from Look Up.

Marketing

S085012 Activity Maintenance Form

A scroll-bar is now shown when display setting scaling increased to a level to make the form extended beyond visible area.

Merging - Conditionals

S084117 Conditional Checks

Fixed issue with conditional checks with *I showing a message stating missing *QEND in document.

Transactions

S085246 Transaction Supporting Documents - History Categorisation

When adding supporting documents to a transaction request, the history categorisation filters (when selected) will display only those documents attached to that category.

Transactions - Accounts

S084993 Fixed Categorisation of Transaction Supporting Documents

Supporting documents attached to transactions are now assigned to the correct "supporting documents" system category.

S084887 Transactional Credit Notes - VAT

When posting a transactional credit note, the VAT amount on profit costs credited can no longer be changed independently of the value of costs credited. The amount of costs credited, subject to VAT rate used, will drive the VAT amount credited.

Web Case referral Takeon

S077534 Fixed issue with Web Import Referals not providing a Case Code

Using the Web Import to create Cases for Referals, the Case Code is now generated.

WorkFlow

S079552 Fixed issue with workflow on lead case running from a screen button

When on a Lead Case and running the a workflow to produce a precedent on each Plot, if more than one Plot is selected: This now works when the workflow is triggered from a screen button, as well as from the Workflow screen.

Worksite DMS - Workspace Move

S085232 Workspace reference not updating when moving case to new client

An issue was identified where the iManage workspace reference was not updating when moving a case to another client.

Configure worksite DMS and connect Liberate SE to Liberate database. Configure the folder method to be History Categories. Configure link method to workspace reference. Create a case and add a document to the history to create the workspace. Select move case and search for new client, select OK to move all contents to the new client and the case will reload. In the properties tab you will see the matter reference and workspace reference now have the new client detail assigned.

Liberate SE Accounts

Billing

S084964 Improved logic to fetch Billing Address

In some data specific situations, it was possible for Bililng to fetch an unrealted billing address. This has been fixed.

The problem arises when there are mutiple entries in ACAL which have a duplicate ALUNIQ. when this is linked to ACCL.CLBAID, it links to the wrong ACCL. Added an extra link which links to ACCL.CLCODE to ensure that we don't pick up the wrong client.

Credit Control

S084300 Credit Control - Processed items

When exiting the Processed items screen in Credit Control, the search filters are cleared down allowing the user to return to the default Processed view the next time they enter that area.

S084304 Credit Control - Preview Processed Items

Previewing processed items within Credit Control now correctly previews the document in focus, rather than the previously previewed item.

S084949 Credit Control Bill Book - Go To options

The Go To options from within a bill in the Credit Control bill book have now been fixed to ensure they load the correct entity when selected (Client, Matter, Case or Contact).

S084992 Credit Control - Instalment Monitoring

Archived matters are no longer included in the instalment monitoring area of Credit Control.

S085044 Credit Control Status Report

The status date within the Credit Control Status report is now updating based on the real time change of status applicable to the Client, Matter or Bill.

S085095 Bill Sent Date on Multi-Matter Bills now visible in areas of Credit Control

The Bill Sent Date on a Statement is now visible in the Bill Book and the Processed area of Credit Control.
NOTE: This is only relevent when Parameter 247 (Credit Control by Bill Sent Date) is set to Y.

S085127 *A listing command not showing unpaid disbursements on credit notes

AK 22/04/22 : Show unpaid disbs on credit notes in *A listing command

Electronic Payments - Reproduce Batch

S080226 Electronic Payments - Reproduce Batches

Fixed an issue whereby attempting to reproduce an electronic payment batch would error is the bank was linked to the Coutts bank format.

Transactions - Accounts

S085052 Transactional Credit Notes - VAT on disbursements

When credit noting disbursements using the transactional credit note function, the VAT rate per disbursement is reflected in the nominal double entry and therefore VAT return.

Transactions - Case

S085082 Party Bank Details - Transactions

If a party record has bank details attached, these bank details will be presented when requesting an electronic payment to that party via transaction request. If the party is set to 'None', then the bank details will revert to allow entry by the user.

Report Generator

General

S085352 Gen Error Since Update Yesterday

Updated code so the "first" column is not dropped when "Include Hidden Columns in Export" is unticked

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Total number of Resolved issues : 61

Total number of changes : 89