Release Notes

Linetime Version: Liberate SE V3.0.282.0

Release Date: 26/10/2021

Linetime

Legal Practice Management Software

10/11/2021

Table of Contents

Features and enhancements

B2C Admin Utility

Security

S080474 | Forgotten Password Form Exposes Whether the Email Address is Already Registered Criticality: Low CVS

Adjusted the returned message to one which does not reveal whether the email address is registered on the system or not.

Liberate Administration Utility

Document Production

R000999 | New ZO option to automatically add Client Documents to existing Clients.

Added ability to propagate client document slots across to existing clients.

General

R000999 | Client Documents Maintenance
A

Check to stop deletion of client document slot if it has been assigned to clients.

Precedent Maintenance

R000996 | Replication of a single precedent multiple times copying all the existing settings

In Precedent Mainentance, selected precedents can now be copied multiple times. They are seperated by using different prefixes.

Liberate SE

Autopost

S077410 | Aligned the Auto Post Print Preview with other print/export options in SE

In Autopost the audit date and time now shows in the grid print raw

Document Production

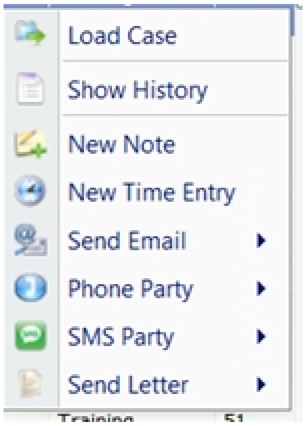
R001000 | New field to store precedent prefix to aid precedent allocations to client slots via admin.

In Liberate SE, a precedent prefix can now be stored against each Client. In Admin can create Precedents with the prefix to synchronise to Client slots.

Outlook Add-in

S078904 | Added the ability to save emails/attachments directly to the AML History via the Task Pane in Outloo

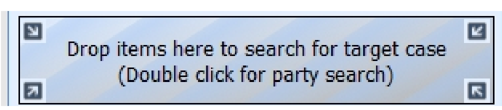
Amended the context menu in the Recently Used tab of the Outlook Task Pane:



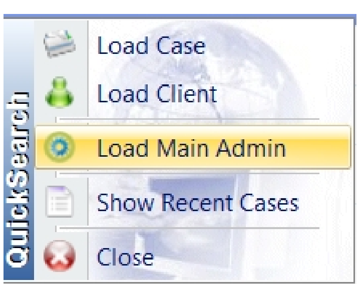
Introduced a new option called 'Attach to AML Case' (wording to be specified by the description of the Case Type (MF) record where in this example AML is the description of the Money Laundering Profile).

The user can use this option after selecting some emails to attach the selected emails to the Money Laundering profile for the Primary Client that corresponds to the case being clicked on.

If the client does not exist in the Users Recently Used tab of the Liberate Task Pane, the User can drag the required email/document onto the button at the bottom of the Task Pane



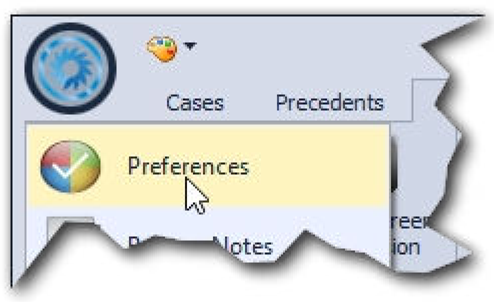
When the QuickSearch screen is loaded, the User will be required to search for the required client. Once the results have been populated, the User can right click and select the 'Load Main Admin' option. This will attach the selected item(s) to the Money Laundering Profile for the Primary Client.



Screen Design

R000840 | New option in preferences to set a default font for the screen designer items.

New option in preferences to choose a default font for the screen designer.



The default font will be used for any new control added to a screen that has a font option.

If the font chosen is different to the one currently selected as default then the user will be asked if they want to change the font (not size or attributes) for all controls on all screens that use a font.

If the user chooses to update all the screens and a screen is open in the designer or in SE it will reflect the font change until the screen is closed/refreshed.

Liberate SE Accounts

Electronic Payments

R001026 | New CHAPS, BACS and Faster Payment Export Files for Lloyds Commercial

Added CHAPS, FP and BACS import for Lloyds (bank link 20) The export files need programming for both Client Account Transactions and Purchase Ledger Transactions.

Postings

S080664 | Added a branch column to the client to office daybook view within integrity checks

The daybook grid is a master detail grid; added branch and its description to the top level (master) grid.

Performance enhancements

Liberate SE Accounts

Autopost

S079480 | Optimised Autopost Search Query

Log S072873 introduced the cashbook reference to the autopost search.
This could link to client (ACMC) or Office (ACMT) transactions. Introducing these 3 new tables slowed down the the query.
Amended the code to restore the original SQL, but change it slightly so the results go into a temp table. The temp table is then queried against the 3 new tables so its working on a smaller dataset.
Tested and the speed is a lot quicker.

Resolved issues

B2C Admin Utility

General

S083163 | Fixed issue when reporting on Sums Recovered Post Judgment in B2C

The Sums Recovered Post Judgment column within a report in B2C is now showing the correct amount

Liberate Administration Utility

General

S083166 | Full designers replication no longer duplicates recipients in Transaction Collaboration

When carrying out a full designers replication in Admin, the Transaction Collaboration recipients are no longer duplicated

S083223 | Action type 64 also share level aware when determining if a workflow is deletable from the workbox.

Action type 64 also share level aware when determining if a workflow is deletable from the workbox.

S083530 | Previously selected Data Items are being deselected when filtering Action Type 106 in Workflow

This function has been rewritten as the first version could never work correctly.

It is not in the same format as all other admin grids and selections are indicated by the "selected" option being checked rather than a blue line across the grid.

Please note that the testing on this is not just the filtering but the whole of the selection mechanism including select all and select none.

S083874 | Creating additional formula lines is holding onto previous sub item information

Adding a second TT5 data item into a formula now blanks the sub item when it is added.

Liberate Case Management

General

S082006 | Fixed issue with SE Licencing losing module configurations when adding or editing Users Modules

When adding a new user in SE Licencing and adding modules or editing existing users modules the module configurations are no longer lost.

S082678 | Registered Office & space in house name/number field error fixed when opening Money Laundering profi

Fixed issue error message being shown within Money Laundering profile when determining registered office house number or name due to leading space in field.

Liberate Court Services

Test submissions

S083287 | Fixed issue with Court Services showing the incorrect message when submitting a Review Batch

Fixed issue with the message appearing when submitting a Review Batch in Test Mode and the message doesn't appear when not in Test Mode

Liberate Debt Collection

General

S082690 | Workflow Action Type 7 - Conditional Check now recognising leading '0's' in a number data item

Workflow Action Type 7 - Conditional Check now recognising leading '0's' in a number data item

Liberate Designers Options

General

S084862 | Workflow

Fix ossie with Action Type 13(Suspend Workflow) not suspending legacy workbox entries.

Liberate Practice Management

Purchase Ledger Payments

S083399 | Paying through Purchase Ledger when an invoice is in a different period.

In Purchase Ledger you now can not back date an invoice to pay when the period is a later period.

Liberate SE

Data Manager

S081185 | Fault occurs when using data manager with Client's containing apostrophes in their name.

Data Manager - fix for issue when purging Client with an apostrophe in surname.

General

S080084 | Marking Client as Inactive via Workflow.

Action Type 20

Literal Value of ACCL.CLACTI to be 'N' will mark the Client as inactive, restrict access to chane the main client fields and will update the Client Identifier on the case as inactve.

S081880 | The money laundering profile linked to this party is also linked to others. Please report error to Linetime Support quoting Case Code

Fixed issue with incorrect laundering profile case being reattached to system parties.

S081972 | Typo in a pop up

Corrected typo in client branch validation message on quote go live.

S082398 | Error saving new client with 43 chars in salutation field. Message: String or binary data would be truncated.

Fixed issue with error message being shown when salutation resolved from party name form exceeding 35 characters

S082554 | Undertaking a conflict check using a 'title' within the search criteria

Amended conflict check to try and remove title from party name before doing the conflict check.

S082970 | Fixes made to SE Credit Control Reminder List

Credit Control Reminder List now shows bills expected to be processed within Credit Control even if they have not been processed before.
The reminder list also looks at the matter level credit control procedure when Credit Control level is set to Client on the client record.

S083093 | Case Maintenance More Tab

Remove Cost Breakdown, Court Budgets and Budget Variance buttons from Case Maintenance More tab if the case is defined under the Portfolio or Subordinate structures.

S083247 | Setting the Composites radio button in the Case Info tab of the Properties when the case is a quote, reverts back to individual once the case has been made live

Fixed issue with use client composites on case properties not recording selection correctly.

S083251 | Client/Matter column not available within Command Level Workbox

Added matter reference field to command level workbox grid via the column chooser.

S083461 | Performance Enhancement

Amendment to Reminders query to improve reminders screen load time.

S083476 | Missing fields on a primary party on a new client

Fixed issue with missing fields and labels when assigning a new primary party on a new client.

S083687 | Fixed issue with Client/Party Registered Office Salutation and Letter Title not merging.

The Client and Party Registered Office Salutation and Letter Title are now saving correctly in the records and merge in a Precedent

S083885 | Subordinate Case Structure is not showing Lead Contacts at sub level or allowing the functionality of Client Precedents to filter down into the sub cases.

Amendments to case maintenance to accomodate subordinate case structure requirements missed during initial implementation.

S084056 | some workflow are very variable and can, on occasion, take twice as long. TITLEBAR, which is on a button on the home screen in the MOTC case type can take between 5 and 20 seconds to execute on the same case within a few minutes.

Amended workflow instantiation to reduce the number of SQL calls when running a workflow.

S084119 | Performance improvement to Parties view.

Updated the indexed view "Parties" to be more efficient. No functional change.

Improvements to the Parties View (a direct speed improvement which will speed up multiple areas to do with parties). Areas include:

- Initialising the Referrals tab
- Initialising party combo boxes
- Matching address search
- Get membership/members lists in Party form
- Populating Case Parties in Parties pane in Case session
- Populating Client Parties in Parties pane in Case and Client session

S084122 | Screen Load time reduced including when using Action Tpe 79 in workflow

Screen Load time reduced including when using Action Tpe 79 in workflow

S084182 | Fixed issue with Formula displaying the incorrect result

Fixed issue with Formula displaying the incorrect result when the last line of the formula was a subtraction

S084763 | Word Addin Bug Fixes

Word addin no longer errors when using it to search cases and attach documents to Liberate Case history.

S084844 | Conflict Check Performance Improvement

We identified an issue on databases with very large numbers of parties (> 400000) and in reviewing the code we discovered that when searching against party name or address could take upwards of 40 seconds. This is now typically under 5 seconds. Different environments will yield different results but performance is greatly improved. This is standard functionality for all clients, the ZO licence reverts to the previous version of the conflict search.

S084831 | Log for Schema Changes in relation to CR R001035 (U.S. Postcodes and foreign address formats)

Schema changes to increase postcode fields to 20 characters

History Notes

S083838 | History Note to Precedent, Worksite, EDV

Specific DMS configuration (Worksite, EDV) were not handling the conversion of a History Note into a Precedent. This functionality now works as expected, the Documents produced are added into Document Folders within Workspaces based on the Store/Link methods defined.

Nominal Postings

S081141 | Cannot post in Nominal at SE screen as office bank is greyed out.

The office bank is a standard control within SE. The nominal posting screen enables the control, but then it gets disabled it again when it gets reinitialsied as the form opens. This is because the control has a property which if set to true, becomes enabled/disable according to param12. Changed the property to false so it ignores the param12. Tested and its now enabled.

Postings

S081599 | Unallocation in different periods

You can no longer allocate to a previous period when the allocation is in a newer period.

Purchase Ledger

S078076 | Amended the Edit Remittance so it writes to History

Document saved changes as a word document and the changed document is available to review in the case history

S078567 | Amend label in Payments area in Ledger Enquiries in Purchase Ledger to be 'Payment Date Range'

Amended the date text to say payment when payments drilldown, but remain to say Invoice when invoice drilldown

Liberate SE Accounts

Credit Control

S081144 | The fields for matter number and bill number are now retained in Procedure Level when the screen is

When you choose Matter or Bill in Procedure Reset within Credit Control, the fields change and expect either a matter number or a bill to be entered. If you then leave that area and access another area within Credit Control, then go back into the area, the fields remain available to type into, instead of switching back to the Client Code field.

Electronic Payments

S077030 | Change to electronic payments file for Barclays Faster Payment output

Added a hypthen (-) to the end of the payment file following Barclays feedback on the format of the faster payment file

General

S081370 | Credit Control Instalments

The start date will default to todays date when creating new instalment plans in credit control. The start date is also a mandatory field.

S082461 | Matter Ledger Print error

[18.05.21 VB]The function to convert time to decimals uses integers to do the calculation. The value of unbilled time for the matte has exceed the max value an integer can hold and therefore caused the error. Amended the integer var into LONGS, tried the report again and no errors encountered.

S082476 | All Bills/Multi Matter Bills ledger view

[20.05.21 VB] Amended the SQ for all All Bills/Multi Matter Bills listing to include paid bills. Tried listing the sample matter and now appearing in list where it was blank before

S082511 | SE Purchase Ledger payee now holds 100 characters

Changes have been made to the Payee in Purchase Ledger to increase the character limit to 100 - this affects the Payee within Supplier Maintenane and the Payments screen.

S082521 | Purchase Ledger Payments - View Related Invoices

[20.05.21 VB] The SQL was already bringing back the correct date, but its was showing the date of the payment ACPY.PYDATE, amended the column to use ACPT.PTDATE. try show the ledger agian and the date is coming back correctly as per samplein email

S084068 | Purchase Ledger Enquiries now shows correct status for invoice paid by direct debit

For suppliers with a 'Direct Debit' payment method the invoice status within Ledger Enquiries now shows as 'Direct Debit - Unpaid' if the full balance is remainig, 'Direct Debit - Part Paid' if part paid, and 'Paid if fully paid.

S084474 | SE billing merge code error - join to TF needs to be say ACTXN IN (63,67,69,68) on join to TF table

AK 07/09/21 : Code change to fix *DG, *AG and *DVG listing commands duplicating disbursements

Ledger Enquiry

S081373 | Ledger Enquiries - Bank Balances (Office)

The drill down detail within the Bank Balances tab in Ledger Enquiries now displays office cashbook items as their GROSS amount, rather then NET. The standard Office account ledger view (which includes non-cashbook items) remains unchanged.

S081691 | Client reconciled date on SE Ledger Enquiries

Now on the client side of the ledger enquiry the reconciled date in the drill down is showing correctly as a blank.

Nominal Posting

S083967 | SE Nominal Postingsnow focuses back to the Branch field after the user has clicked Post

After making a posting within Nominal Postings, the field in focus now goes back to the Branch - this means the user does not need to click into the branch field first in order to make a further posting.

postings

S082878 | Transactional Credit Notes

A change has been made so an error message appears if something goes wrong in transactional credit notes rather than just close Liberate down.

Postings

S078645 | Client to Office Transfer no longer allows Office Credit when parameter 25 is set to N

Added code to check that it will not put office into credit for each selected transaction to be posted. Added a cancel option in the warning message to allow the user to stop the processing in case they selected a large amount of transactions and want to leave midway through the posting.
(Parameter #25 controls whether the system allows office in credit or not.)

S083826 | SE Posting reference

Now when creating a client/office credit and COTR then the reference now highlights on the second posting if there is a reference populate and allows you to overtype it.

Unified Web

General

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

Multiple fixes to the new unified version of B2C.