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Release Notes

Linetime Version: 4.6

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Features and enhancements

Business Intelligence Dashboard

Reporting - Dashboards

S086045 New fields available in spDashBillsRenderedAndBillsPaid

New fields now available in spDashBillsRenderedAndBillsPaid. These fields are the Case Code, Fixed Fee Amount on Matter, Budgeted Profit Costs on Matter and the Matter Type code and Description.

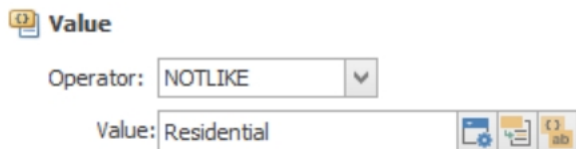
Reporting - Query Builder

S084997 Added predicate operators

A series of new operators and a function have been added to the Query Builder to make it simpler to filter your queries on text and date, or accounting period/year.

New pattern matching operators

Operators “NOTLIKE”, “LIKE_WITH_ESCAPE” and “NOTLIKE_WITH_ESCAPE” can now be selected in the Predicate Editor window.



The NOTLIKE operator is the logical opposite of LIKE

Notes on wildcards with LIKE and NOT LIKE

When using LIKE and NOT LIKE to test for string patterns, you can include the following wildcard characters

- The percent wildcard (%): any string of zero or more characters.
- The underscore (_) wildcard: any single character.
- The [list of characters] wildcard: any single character within the specified set.
- The [character-character]: any single character within the specified range.
- The [^]: any single character not within a list or a range.

Wildcard characters can be used in conjunction with one another, as well as repeated multiple times in the same matching pattern.

Examples

Find all the names whose second character is “a”



Find all the names where the first character is Y or Z

Operator:

Value:   

Find all the names where the first character is in the range A through C

Operator:

Value:   

Find all the names where the first character is not in the range A through X

Operator:

Value:   

LIKE_WITH_ESCAPE and NOTLIKE_WITH_ESCAPE

If you want to include one of the wildcard characters in your search pattern but instruct the program to treat it as a regular character, use the “LIKE_WITH_ESCAPE” or “NOTLIKE_WITH_ESCAPE”. These operators behave like “LIKE” and “NOTLIKE”, respectively, except you can optionally “escape” wildcard characters using the backslash “\”

For example, if you want to search for any string which contains a percentage symbol, you would need to use “LIKE_WITH_ESCAPE” and construct the predicate as shown below

 Value

Operator:

Value:   

Here, the first and last percentages are acting like wildcard “any characters”, but the middle percentage is treated as an actual percentage symbol because it is escaped i.e. preceded with the escape character, which is the backslash.

Another example of escaping; If you want to search for all patterns that do not start with an underscore character you would use the pattern below.

 Value

Operator:

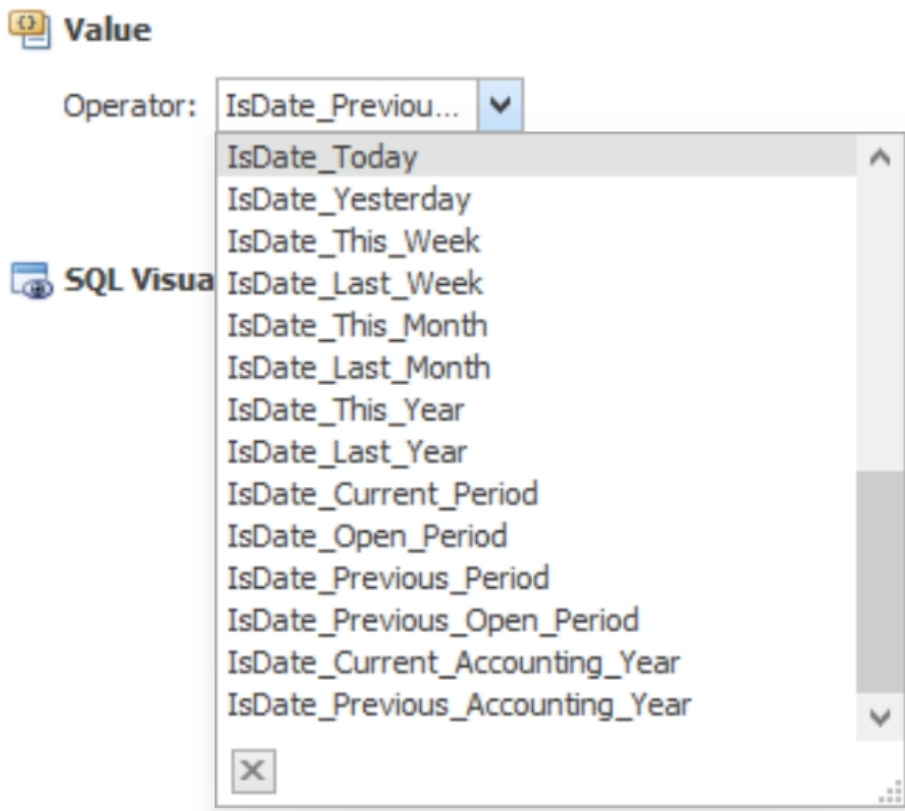
Value:   

Here we are using the “NOTLIKE_WITH_ESCAPE” which behaves like a “NOTLIKE” i.e. all results NOT matching the pattern.

The pattern starts with an escaped underscore “\” which means “start with a regular underscore character”, followed by the % wildcard for “any other characters”.

New Date Operators

The following new operators can be chosen to filter by Date fields.

**IsDate_Today**

Filters dates matching today only. The time component of a date is ignored.

IsDate_Yesterday

Filters dates matching yesterday. The time component of a date is ignored.

IsDate_This_Week

Filters dates matching this week (starting Monday) only. The time component of a date is ignored.

IsDate_Last_Week

Filters dates matching last week (Monday to Sunday) only. The time component of a date is ignored.

IsDate_This_Month

Filters dates matching this month only. The time component of a date is ignored.

IsDate_Last_Month

Filters dates matching last month only. The time component of a date is ignored.

IsDate_This_Year

Filters dates matching this year only. The time component of a date is ignored.

IsDate_Last_Year

Filters dates matching last year only. The time component of a date is ignored.

These date filters are dynamic, meaning each time the query is executed the new date of execution is used to re-evaluate what is today, this week, last month etc.

For example, a query using the “This Week” filter to query transactions created this week, will automatically roll over on

Monday morning at midnight to the new week.

New Date by Period Operators

The following new operators can be chosen to act on Date fields

IsDate_Current_Period

Filters dates that are in the current accounting period. If the previous period is open, this is the open period + 1.

IsDate_Open_Period

Filters dates that are in the open accounting period only. This excludes the current period if the previous period is open.

IsDate_Previous_Period

Filters dates that are in the period prior to the current accounting period.

IsDate_Previous_Open_Period

Filters dates that are in the period prior to the open accounting period.

IsDate_Current_Accounting_Year

Filters dates that are in the current accounting year, between the first accounting period and the first accounting period plus 11, inclusively.

IsDate_Previous_Accounting_Year

Filters dates that are in the previous accounting year, between the first accounting period in the current year minus 12 and the first accounting period in the current year minus 1, inclusively.

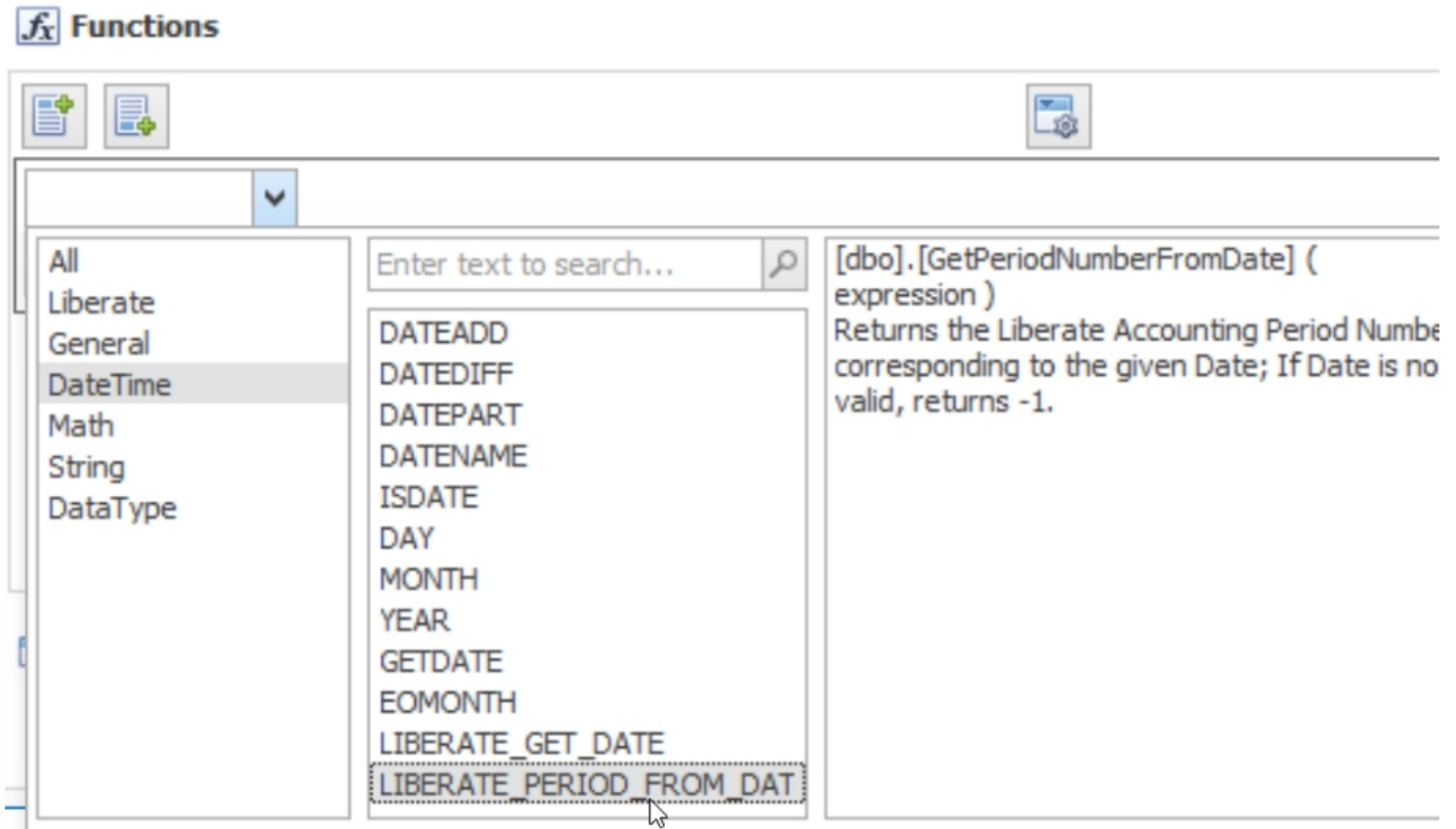
These period filters are dynamic, meaning that each time the query is executed, the new date of execution is used in conjunction with updates values from the accounting period information table, to determine what is now the current period, or current accounting year. If month/year ends have been run that the query will automatically adjust.

When utilising these date functions, the “Info” column in the Predicates window will not show the underlying SQL, as it is hard to read, instead showing an English description of the chosen operator.

Predicates for Main Query	
Operator	Info
AND	[Transaction Date] in Current Accounting Year

New Function “LIBERATE_PERIOD_FROM_DATE”

A new function has been added to those available in the Expression Editor



This function converts any date to the number of the corresponding Liberate Accounting Period. This is defined as the number of months since the 1st December 1990. Liberate Period 1 started 1st January 1991.

New Variables for Accounts Period Data

The following new variables have been added so you can work with accounts period data from Liberate.

```
Open Period(@NNPERD)
Current Period(@NNPERD+ @NNPFLG)
Period Open Flag(@NNPFLG)
First Period of Accounting Year(@NNACCT)
```

You can select these from the “Choose Merge Code” drop down when in the Predicate Editor window.

Predicate Editor

Base Field

Name: DataType:

Expression:

Run-time Prompt Options

Value

Operator:

Value:    

SQL Visualiser

Once selected, the variable code is shown in the Predicate Editor box.

The Predicate Editor box remains editable; This allows you to make mathematical alterations to the variable, by typing “+1” or “-4” after it.

For example, if you wanted to filter dates on the first three months of the current accounting period, you could use a “BETWEEN” operator, and choose the “First Period of Accounting Year” variable for both the from and to box, but then add a “+2” into the to range box, as shown below.

Predicate Editor

Base Field

Name: DataType:

Expression:

Run-time Prompt Options

Value

Operator:

Value:     and    

Because BETWEEN is inclusive, it will filter all dates where the Transaction Period is greater or equal to the First Period of

the Accounting Year, up to and including the third period in the same year (the first plus two).

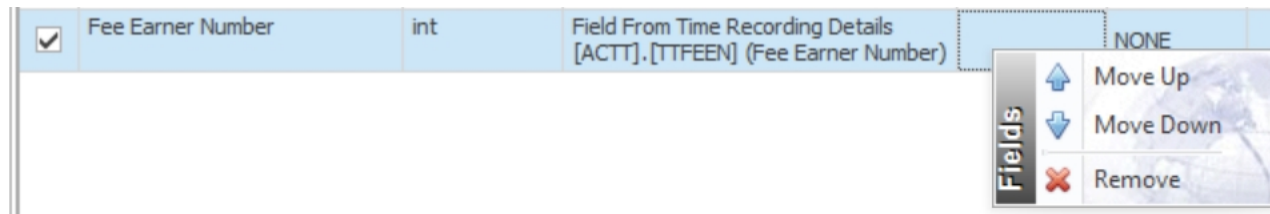
S082100 Removing query fields: prompts to remove underlying field source if unused.

When a field is deleted from the Select list, the Query Builder now checks to see if the related source item in the query is still used; If not, the user is automatically prompted to delete the source item.

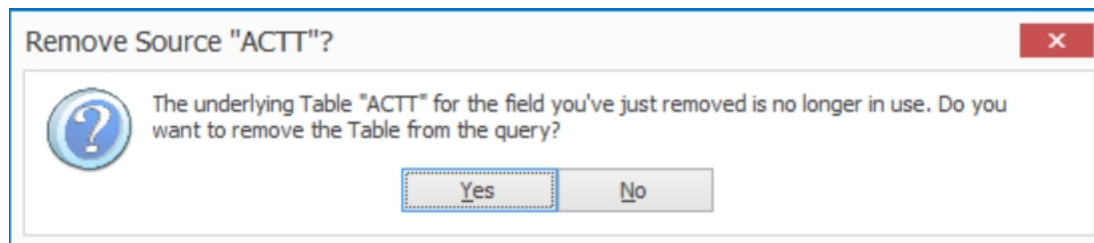
Example: If you have a query that includes some fields from the Case Header (MT), then you add ACTT.TTFEEN, it will automatically bring in the ACTT table and create a Join to it from MT.

Sources for Main Query				
Join Type	Source It...	Alias	Entity Type	Active Join
LEFT OUTER...	ACTT	ACTT	Table	Join using [MatterCode] from ACTT to MT on ACTT.TTCLIN=MT.CKEY and ACTT.TTMATN=MT.

If you subsequently **Remove** the ACTT.TTFEEN field using the context menu;



The program now prompts you: "The underlying Table "ACTT" from the field you've just removed is no longer in use. Do you want to remove the Table from the query?".



You will only see the above prompt if the field you are removing is the only one derived from its underlying source. i.e. if you have multiple fields from ACTT in your Select list, only when the last one is removed would you be prompted in this way.

Liberate A2A Interface

Integration - A2A

S082374C Changed error message for Loss Type 16

If accident date prior to 31.05.2021 you cannot have a loss type 16, added message to advise.

Liberate Administration Utility

Liberate Admin

S085268 Client Category and Working Dates Maintenance in Admin now available in .NET

Client Category and Working Dates are now both available in .NET Admin, Maintenance

S085585 Bulk Workbox moved to .net

Bulk Workbox has been rewritten in .net, with the same functionality

S085594 Case Owner Move function moved from vb6 to .NET

Case Owner Move now available in Admin .NET

S085274 3rd Party Credentials - .NET

The 3rd Party Credentials module has been programmed into .net and is now available within the Liberate SE Admin Utility.

Liberate SE

Billing

S085689 Bills not saving to history category if saved on the precedent header

This enhancement now saves a copy to the history category specified on the precedent header as well as the bill category in the system category folders.

Case Parties

S085451 Extra wording added to Party option 'Re-Useable Party'

Extra wording added to clarify the effect of selecting/unselecting the option

Document Bundling

S086218 Fixed spelling mistake in Document Bundling Module - "Bewtween"

Fixed spelling mistake in Document Bundling Module - "Bewtween"

EDV & Worksite DMS

S085031 Improvement to Workspace Sync feature to remove any retained 'Reservation File' instances.

This change adds functionality for the Reservation Documents to be mopped up on Sync.

Electronic Payments

S085629 Bank Of Ireland BACS Files

Bank link #14, Bank Of Ireland, will now produce Electronic Payment BACS files for purchase ledger and client account transactions.

General

S086161 New Feature add clear doc date, document number per section, colon separator for section and page no

New right click feature added so that the document date can be removed for all bundle items and also re-added again for all items. New right click feature for adding a numerical number against a bundle item per section. This will show against the document name in the ToC. Check box option to add a colon between the section number/alpha character and page number when returned into the ToC. This makes the page numbering clearer if numerical sectioning is used.

S083928 Liberate Spell Checker

Spell checker added to the following areas: Bill Note, Case Description, Reporting/Case Note, Party-Case Notes, History Narratives/Notes, Any character Data Items, Billing Narrative and Time Narrative. Pressing F7 in all these areas will open the spell checker when the cursor is focused in the relevant area.

S081084 Resolved issue when adding MT.FEEE to a reminder in type 63 Workflow Component

When creating a workflow step and using Create Direct History Note (63), you were previously unable to set a reminder against the merge code for the Case Fee Earner (MT.FEEE). This has now been resolved, however, please note that when setting reminders for Fee Earners, they must also be a user on the system.

Integration - SDLT

S085417 Changes made to SDLT validations

Improved the SDLT validation on recommendation by the SDLT SDS Team

QuickSearch

R001002 Ability to do table type 5 and extensible data item searches.

Using the data item search, it is now possible to search for items held within table type 5 and also extensible data items.

Reporting

S085479 Introduction of Report Schedules Maintenance

Reporting outputs can now be created on schedule. The schedules are defined in SE Business Intelligence Reporting. The report production is performed by Linetime Service. This is phase one, that simply produces reports into a specified location at a set given time frame. Phase 2 will include notifications and additional features.

Search auditing

S076876A Liberate will audit Search requests into Elastic search.

New tables within the Liberate database will record an Audit of Elastic search requests.

Workspace Sync

S086052 Improved Workspace Sync logic

Application now performs Pre-Workspace-Sync Folder check because it's not possible for the Sync process to create Ad-Hoc Document Categories in the Categories under the SYSTEM category, which is restricted in Liberate - If a Workspace Folder has been created in Worksite in the Corresponding location, the app cannot Sync those folders - the Sync will align the Folders it can and warn the Operator when sync is completed about the Folders in SYSTEM.

Liberate SE Accounts

Autopost

S086206 Unholding transactions above submitted level

Amended the logic to enable/disable the unhold button to allow transactions above submitted level to be unheld.

Billing

S086040 Allowing Bills on Legal Aid Matters To Be Generated Via the Multi-Matter Bills Module

A new Red Globe Admin Option within the Billing section, that will allow firms to generate individual or statement bills on Legal Aid matters, through the multi-matter bills module. Please note, this option should not be utilised if using the LAA Bulk Upload module.

Purchase Ledger

S085173 Enhancements To SE Purchase Ledger and Transactions

Added Functionality to SE Purchase Ledger as follows:

- 1.Invoice Authorisation Audit
- 2.Invoice collaboration Ability
- 3.Invoice Approval/Submitting Restrictions On Value Per User Record
- 4.Invoice Approval Audit Within Electronic Payments Module Batches Area
- 5.Added Notes Options Within Payment Reconciliation
- 6.Access to Electronic Payments Batches Area Available On Fee Earner Desktop Licence
- 7.Purchase Ledger Cases Available Within the Outlook Recently Used Cases List

Added Functionality to Transactions as follows:

- 1.Ability To Set Transaction Rules As To Which Level The Transaction Enter Autopost
- 2.Ability To Restrict User Approval
- 3.Transaction Approval Audit Within Electronic Payments Module

Unified Web

B2C Desktop

S086171 Need the ability to retrieve documents from Mstore

Added a call to the old history function in Smart Connect to retrieve documents from Mstore.

Total number of Features and enhancements : 25

Resolved issues

Any Other

Client/Party Maintenance

S086072 Party Deletion Through Data Manager

The system has been updated to ensure parties linked to a non-reusable category are also deleted through the Data Manager module. Previously, if the party was not linked to any other case and marked as non-reusable, but, linked to a category, the system would not delete through data manager. An extra check has been added, in that if the category the party is linked to is marked as non-reusable, the party will delete. If the category is marked a reusable, the party will not delete, even if the party is marked as non-reusable, it is still linked to a reusable category.

Business Intelligence Dashboard

Reporting - Business Intelligence

S085660 Enhancements to the Business Intelligence UI

Autofilter row is now displayed by default in the "Intelligent Objects" and "Available Queries" grids.
The "Intelligent Objects" grid can now pinned/unpinned and have it's width adjusted.

Client Take On

Takeon - Clients/Matters

S085614 Trading as field updated when creating clients via Take On

Trading as is applied to the Client Name for a commercial client in Liberate Admin's Client Take-on.

Liberate Administration Utility

General

S082943 Liberate Admin – Precedent Validation

Bug fix to ensure the validation icon within Liberate Admin will not produce a SQL error and close the application. The system now produces an adequate message stating the invalid merge code within the precedent, if applicable.

Liberate Admin

S085519 Full replication issue due to timeexclusions table not deleting the values in the destination table

This resolves an issue where the code that is copying the timeexclusions table isn't deleting the values in the destination table before it copies the data from the source.

S085609 Transaction type 6 issue when creating a workflow

Corrected an issue in action type 6 so that if you make a selection error on the transaction and then go in to ammend it to a transaction that contains a phase and task selection, the save button is no longer greyed out for selection

S086074 Liberate Admin – 3rd Party Credentials

Bug fix to prevent error when loading the .NET 3rd Party Credentials module.

S086091 Fixed issue occuring when deleting Data Items in Admin

Can now successfully delete Data Items in Admin

Run mode

S085473 Data Manager Run Mode

Fixed issue with run mode not working correctly. Used for scheduling in Windows task manager for overnight processing

Liberate B2C

B2C

S086189 Unified web report not loading

The completed and PX reserved reports now display correctly.

There was an issue that called the mobile versions instead of their desktop counterparts.

Liberate Case Management

General/System

S086000 Default browser when Internet Explorer is not available

When starting a URL and Internet Explorer is not installed on the Local PC, use the Operating system to Shell the default application

Also, when there is no Dot (.) in the link I allow HTTP:// and HTTPS://

Liberate Court Services

Integration - SDT

S085135 Changed error handling in Liberate Court Services

Function to test error handling available in Liberate Court Services, able to check whether submissions have been submitted

S086099 Liberate Court Services change made to column width to match schema changes

Change made where characters in MTDESC exceed 300, able to add into Liberate Court Services with no error messages

Liberate Debt Collection

DMS

S086152 Liberate Classic Debts restored functionality for 'Create Missing Workspace Reference Data'

The Liberate Debts application uses some specific configuration within the Liberate database, to enable compatibility with a system configured to use the Worksite Link Method: 'Workspace Reference'.

The CreateMissingWorkspaceReferenceData parameter was not being correctly interpreted by recent versions of LiberateCM due to a program fault.

Liberate Designers Options

Liberate Admin

S085720 Fixed issue with the sequence number of Table Type 5 rows

Deleting rows within a Table Type 5, new rows are added with the next available number

Liberate Practice Management

Time Recording

S085399 Time Transfer Module

The Fee Earner column within the Time Transfer Module has been amended to display the Fee Earner Name, as opposed to the Fee Earner number that was previously displayed.

S085634 Write Off Time Category and Write off Reason failing to return for multiple lines.

When writing off time using Write Off Category and Write off Reason the category and reason populates all lines on both the Time Transaction screen on the ledger and the SQL report.

Liberate SE

Archiving

S086181 Update to the Fee Earner lookups so they accept 4 digits in the Fee Earner Number.

The Look-up for Fee Eanrners is now Valid at 4 characters.

Autopost

S086090 Autopost Transaction Summary Report – Transaction Total

Within when viewing the transaction summary report with SE Autopost, the report now display the transaction total correctly. Previously, the total was not pulling through on the summary report, this has now been corrected.

S086096 Editing Client to Office Transaction in Autopost

Fix to ensure when editing type 85 transactions in autopost, and amending the value, the system will also update the value to allocate (if pro rata allocation is enabled). Previously, if the value was edited, the amount to allocate against Cost, VAT and Disbursements in the allocation screen did not change.

S085363 Case Level – Transactions Supporting Documents View

Fixed bug, whereby when viewing supporting documents from within autopost at case level, and the History was open in a tab, the system would take the user to the full history view, essentially switching to the history tab showing all documents. If the history tab was not open, this was not a problem. Now, if the history tab is open and users are viewing supporting documents in autopost, the system opens a new floating history view, showing only those documents attached to the transaction.

Bank Reconciliation

S085487 SE Bank Rec – Additional Security Checks

Within SE Bank Rec, additional security checks have been added to the import process. Previously, the system would perform import security checks at the point of inserting the statement date, and if any failed, the system would pop up a message to say, for example, statement has already been imported.

The check to see if the statement has already been imported has also been extended to when a user presses confirm within the import area. This is to prevent 2 or more users trying to import the same statement at exactly the same time.

Billing

S086028 SE Billing Wizard - Visibility Of Bill Note

System update to ensure when a bill note is not present against a bill, the bill note symbol will not show. The bill note symbol will only show if a note is present. The ability to right click and add/remove a note with the review bill area still remains.

S085687 Billing Wizard – Credit Note Document

Within SE Billing Wizard, change to ensure when producing a credit note, the merge code PCOST will merge correctly. Previously, it incorrectly returned the full amount of profit costs on the bill being credited. This change means that when viewing the original credit noted bill in the Review Bills area of Billing Wizard, the original bill will be invalid, but the credit note will be valid. Both bills will be stored correctly in the case history.

Case History

S086168 Elastic search initialisation is now performed on a Background thread.

Initialisation of Elastic search now occurs on a background thread - meaning that any connectivity issues between the Liberate client and Elastic search server will not impact on the load times for the History screen.

Case History - General

S085997 Error when moving a document from one case to another with Watchers set in Properties

Fixed issue with Watcher error message being shown when amending history items.

Case Maintenance

S086165 Parties Pane All Tab Speed Issues

Changes made to all parties tab load to pause rendering during data load.
Stopped full refresh of the all tab when using drag and drop of a party from the tab.

Case Parties

S085673 Fixed issue with Party Maintenance appearing behind other applications

Issue with party maintenance form appearing behind other applications now fixed

Client/Party Maintenance

S086024 Postcode lookup on client inception form.

Fixed issue with missing icon for postcode lookup on client inception form.

Conflict Check

S085402 Fixed Issue when searching a Postcode Conflict Checker

Search using postcode now working in conflict checker

Credit Control

S085704 SE Credit Control Reminder List - Written Off Third Party Bills

Corrected issue, whereby written off values on third party bills were incorrectly showing on the Reminder List. This issue did not affect Final/Interim bills, only written off values on third party bills.

Data Integrity and Patches

S085595 Fixed issue with Additional Parties Patch checking commercial clients

Additional Parties Patch in Red Globe, Admin Options now only checks the private clients

DMS

S086196 Work 10 DMS, Add Document to Case History

Improvement to Work10 Add Document process to handle Folder Profiles more robustly.

S082624 Worksite DMS - Deleting a (worksite deleted) Document

When attempting to remove a Document from Case History, that relates to a Worksite DMS document that has already been deleted within Worksite, no error will be produced and the Case History entry will be marked as Deleted.

S085456 Improved process checking for duplicate History Category / Workspace Folder names

Correction applied to the query that checks for existing Ad-Hoc Document categories so that duplicates are not incorrectly reported in the UI.

S086153 Improved query which generates Workspace Reference data to prevent Nulls in some padding scenarios.

Specifying Padding on a data component of the Workspace Reference, could cause the generation process to fail - when the data is longer than the Maximum length specified.

S085611 AML Workspace functionality.

Correction applied to process to Move a Worksite Workspace, so that the AML/Conflict Check Documents move to the Latest Client that the Party is associated with - UpdateProfileClientCodeToRelatedClient, ZO: 55591999

S086148 Improved error handling when processing Workspace Profile updates

Improved error handling logic when updating the custom attributes associated with a Worksite Workspace during the Add Document procedure, to address/identify an iMan___25 update error.

Document Bundling

S086187 Issue resolved where Section Templates would not load into a bundle

Sections added to a bundle can be saved as a template and re-used in other bundles. This feature stopped working, templates could be saved but not loaded into a bundle, this has now been resolved.

S086138 Issues resolved regarding adding bundle templates and drag and drop to the popout sections grid

Issue resolved where an error occurred if you clicked add template in bundles where no documents had been selected.
Issue resolved where the system would crash if you used drag and drop to drop a section over another one in the sections pop out grid.

S086139 Fix to incorrect document paths when exporting PDF bundle

Issue resolved where downloaded Bundle Documents were saving to incorrect section headers.

General**S086194 Ticking the Disable DirectX Option in LiberateSE User Options not retaining value on reload.**

Fix issue with Disable DirectX checkbox value not being retained.

S086207 Fixed issue with Single Extensible Data Items not updating via Workflow

Data is now storing in single extensible data items when updated via workflows.

S085591 Data Item Set to any character errors if entering a '/'

This resolves an issue where if a data item is set to any character and you enter i.e 185/8 it errors saying there is an invalid date value set.

S085120 Fixed issue with email subject line showing correct party information

Sending emails from a marketing/money laundering profile now displays the parties information in the email subject line.

S086082 Application close-down procedure improved

Improved Application close-down mechanics to ensure subsequent start-ups are problem free.

S085340 Case not listed in the case/matters list in the client when case set as private

This has been resolved so that if the case is set as private you can now see the case listed under the case/matters list in the client record when you have been granted access to the case.

S085683 Set As Private Action Type in Workflow, now re-setting the case access settings

When running the workflow and a case is set as private, you can now unset the case as private from removing users selected

S085493 Credit Control Status for Matter removed on Payment

If System Parameter 113 is selected when a matter is fully paid the Credit Control Status for matter is removed.

If a warning for client is present this will be retained until such time as manually removed so any further matters created flag up that there have been historical problems with the client.

S082435 Branch Merge Code – ACR_BRADDR1

The merge code ACR_BRADDR1 now prioritises merging the case branch information as opposed to the matter branch. If the Case Branch is blank, the merge code will then pull through the matter branch. Previously, the merge code prioritised the matter branch over the case branch.

S085623 Conflict and AML produced an error when clicked the attach to case button

This has resolved an issue where if you clicked the Conflict and AML attach to case button twice in rapid succession you would get an error stating there was already a file with the same name and you would have to task manager out to close down Liberate.

Integration - FormEvo**S086164 Automatic Form Evo Site login when creating a new Form version.**

If you create a new Form Evo form and then exit a case, when you return to a case history and create a new version of a Form, it will now automatically open the Form up for you in the Form Evo website.

Integration - PerfectPortal

S086208 Issue resolved when importing Perfect Portal quotes created with joint clients that already exist

An error was occurring when quotes were imported for multiple clients that already existed in Liberate. If any of the clients were linked as separate entities, the import would cause an error message. This has now been resolved and if the clients do already exist separately, a new joint client is now created without issue.

S086134 Perfect Portal case creation - Issue resolved regarding completing wizard without selecting a case type

You were previously able to continue through the client and case creation wizard without selecting a case type, this caused an issue with creating a case when the wizard was complete. Now unable to continue through wizard unless a case type is selected.

Liberate Admin

S085712 Client No field in Workflow Action Type is now saving the number

When selecting a client field within a workflow action type and the client no field is available, this now saves the client number.

S086135 Fix error when opening Charge Table maintenance in Admin

If using the By Code 'Look up' option, charge table maintenance now opens with no errors.

Marketing

S085715 Date Range settings in 'queries' within Marketing

Fixed issue with date ranges on date data items queries not producing expected results.

S086129 Marketing Query Matter field error

Issue resolved with an error being returned when running a Marketing query using Matter fields

Nominal Postings

S086087 Transaction Payee Field - Enabling TAB Function

When entering a new Payee within any transaction screen, users can now TAB through and the system will lock in the payee. Previously, the payee entered would only 'lock in' if Enter was pressed.

Oyez to DMS

S086212 Oyez files to Work10, TYPE assignment

Oyez-based Liberate precedents will create Work10 DMS entries with the correct Worksite Document TYPE

Quotes

S085392 Quotation Cases – Conflict on Client Party

Bug fix to ensure when saving a conflict check on a new client party data item within a quotation cases, the system does not produce an error and saves the conflict check results into the client money laundering case.

Reporting - Dashboards

S086098 Fixed issue where Command Centre would not open properly if not configured to open automatically on startup.

Fixed issue where Command Centre would not open properly if not configured to open automatically on startup.

Reporting - Query Builder

S085702 Query Builder doesn't filter correctly on numeric data items containing values over one thousand.

The Query Builder now removes commas from any numeric data items before converting them to decimals. Any existing queries exhibiting this problem should be modified by having the numeric data item that isn't filtering properly removed and re-added to the query.

Smart Connect - Everything Else

S086158 Smart Connect

A field for 'Source of Introduction' has been added to the 'Clients' tab and the partner's details now correctly populate in SE when passed through Smart Connect

Time Recording

S085426 Transferring Time Notes to a Case

Fixed issue whereby when converting notes to a matter from command level, the system would produce an error. This has now been corrected.

S084882 Time Recording Display – 0.00 value rate

Bug Fix, to ensure that when time recording with a private rate of 0.00, the rate display will show as 0.00, rather than a blank field. Previously, when time recording against a 0.00 value rate, the rate field would show as blank rather than 0.00.

Transactions - Accounts

S086102 Loading Ledge Enquiries with Written Off and Reversed Time

Bug fix. If a time entry had been written off, and the entry then subsequently reversed, previously the system would produce an error when loading the time transaction tab in Ledger Enquiries. The error no longer occurs.

Liberate SE Accounts

Autopost

S085599 SE Autopost -Automatically Update Grid With Edited Values

When editing a transaction in SE Autopost, the system will now automatically update the grid with the new amended data. Previously, users would need to refresh the grid to view the amended values.

Billing

S085564 SE Billing Wizard – Include Left Fee Earners Option in Allocation

Bug fix to ensure when selecting the “Include Left Fee Earners” Option within the SE Billing Wizard Allocation screen, the system does not produce an error. Previously, the system produced an error and excluded left fee earners from the allocation drop down.

Client/Matter Ledger Enquiries

S086060 Split Bills – Time Entries

Bug fix to ensure when billing time entries on a split bill, the time transactions do not duplicate on the financial ledger. Previously, when producing a split bill with time entries included, the relevant time entries would duplicate on the financial ledger.

Cost centres

S085472 SE Nominal Postings – Cost Centre 3 & 4 selections

Update to the system to ensure when selecting cost centres within SE Nominal Posting, the options available are correct. Clicking on the cost centre 3 drop down, users will only see cost centre 3's linked to the cost centre 2 selected and ones not linked to any cost centre 2. In addition, clicking on the Cost Centre 4 drop down, users will only see cost centre 4's that are linked to the cost centre 3 selected and ones not linked to any cost centre 3.

Credit Control

S086175 Credit Control Procedures/Processing – Incorrect Restriction to 11 Lines

When running the credit control processing, the system was incorrectly running only the first 11 rows of the relevant procedure. This is a bug fix to ensure the system produces a document/email for every line within the credit control procedure, whether 1 line or 200 lines, there is no restriction.

If you currently have a procedure with more than 11 lines, when running the credit control procedure after an update, you will notice documents and email been produced for lines 12 and above, as the system is trying to catch up.

S086183 Emailing Bills from SE Credit Control

When emailing bills from within the SE Credit Control bill book, the name of the bill attachment will conform to the bill naming convention set on the Admin Red Globe Billing settings.

DMS

S086156 Correction for fault when reviewing Draft Bill giving incorrect Workspace Reference error.

An error within some validation logic was causing an error message prompt to be displayed when reviewing a Draft Bill. This has been fixed to restore the draft bill functionality.

General

S086172 Transactional Credit Note On Vatable Anticipated Disbursements

Bug fix, to ensure when transactional credit noting a vatable anticipated disbursement, the output vat wrote back correctly. Previously, there was an error by which if a vatable anticipated disbursement was transactional credit noted, the output VAT amount would not write back, thus causing a TB imbalance. This was only caused by transactional credit notes. Full Credit Notes wrote back the vat correctly.

Nominal - Posting

S086184 SE Accruals/Prepayments Posting screen – Printing

The print button now works within the SE accruals/prepayments posting screen. Previously, pressing the button did not open up the print preview screen.

Postings

S086174 Cost Centre 1 - Transactional Credit Note

Bug fix, to ensure when transactional credit noting a bill, the cost centre 1 figures write back to the relevant nominals correctly. Previously, there was an error whereby the cost centre 1 figures would not write back. This error only affected transactional credit notes.

Purchase Ledger

S086216 SE Remittance Advice – Case Notes Box

System update to ensure that when generating remittance advices from SE Purchase Ledger, the system saves the remittance advice to the supplier history automatically without popping up/generating a case notes box or document renaming box. The system will simply generate the email and attach the remittance advice.

Liberate Worksite Context Menus

DMS

S086186 Worksite Sync process robustness improvement

Application now handles Document references better to avoid sync-related warnings when accessing History.

Microsoft Outlook

MStore DMS

S085692 Added Compatibility with MStore DMS

Added Compatibility with MStore DMS

Smart Connect

Smart Connect - Everything Else

S086167 Smart Connect API Send Email function fixed

Can now send emails via the Smart Connect API with and without attachments

Total number of Resolved issues : 81

Total number of changes : 106