

Software Release Notes

Linetime - V5

01 October 2024

Microsoft Email

We want to inform you about a recent change introduced by Microsoft that has affected how emails are saved within our system. This issue has resulted in emails being saved in an altered MSG format which classic Desktop Outlook does not render correctly, with the loss of formatting and images contained in those emails.

We have developed a solution in our latest version, V5, that addresses this issue and ensures that emails retain their original formatting upon saving. We strongly encourage you to upgrade to V5 as soon as possible to eliminate these issues and maintain the quality of your email correspondence.

Important Update on Feature Development and Bug Fixes

Please note that new features and bug fixes will only be included in the next planned release version, or in a patch update compatible with the latest release.

We will not be retroactively addressing issues in any previous versions.

We strongly recommend that all firms upgrade to our latest release to eliminate productivity issues and benefit from the new features.

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Features and enhancements

Business Intelligence Dashboard

Reporting - Dashboards

LTRM-52 Ability to design Reports and Dashboards for B2C Users

Designing Queries for B2C

A new “merge code” option is available in the Predicate Editor, called “B2C User’s Case Codes”

The screenshot shows the 'Predicate Editor' window. It has several sections:

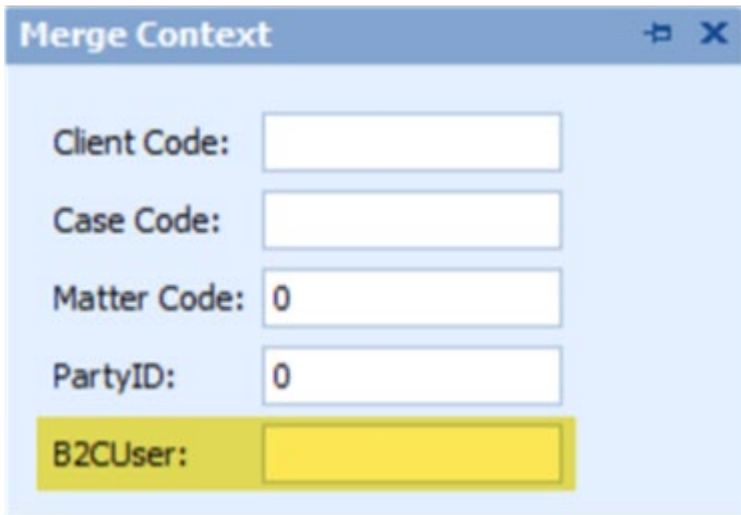
- Base Field:**
 - Name: Case Code
 - DataType: varchar
 - Expression: [MT].[CODE] AS [Case Code]
- Run-time Prompt Options:**
 - Value: [B2CUsersCaseCodes]
- Operator:** Equals
- SQL Visualiser:** (Empty area for visualizing the SQL query)

A dropdown menu is open next to the 'Value' field, showing a list of available predicates. The list includes:

- User ID(ZZ.CODE)
- User's Fee Earner Code(ZZ.FEE)
- User's Team ID(UserTeamID)
- User's Fee Earner's Department(SFE:TEAM)
- User's Fee Earner's Team(SFE:TEAM)
- User's Fee Earner's Section(SFE:SEC)
- B2C User's Case Codes(B2CUsersCa)** (This option is highlighted in yellow)

This is designed to be used against a Case Code field and will make the predicate limit the Cases to ones which the current B2C User has access to.

As no B2CUser is present when designing the queries, a new “B2CUser” field has been added to the “Merge Context” pane



The screenshot shows a window titled "Merge Context" with a blue header bar containing a pin icon and a close button. The main area is light blue and contains five input fields stacked vertically. The first four fields are labeled "Client Code:", "Case Code:", "Matter Code:", and "PartyID:", each followed by a white text box. The "Matter Code:" and "PartyID:" boxes contain the number "0". The fifth field is labeled "B2CUser:" and is followed by a yellow text box. The "B2CUser:" label and its corresponding box are highlighted with a yellow background.

Typing in the UserID of a B2C User here, in conjunction with the above merge code will limit queries to Cases that the B2C User has access to.

When Reports and Dashboards using queries built in this way are executed from B2C, the current B2C user will be used to limit the data results of the underlying query.

This allows designers to build reports for publishing via B2C that will only show data they have access to.

Note that it is possible to publish data that is not filtered by B2C User if you so wish. Caution should be taken to test any query that will be published to make sure it is returning the intended data.

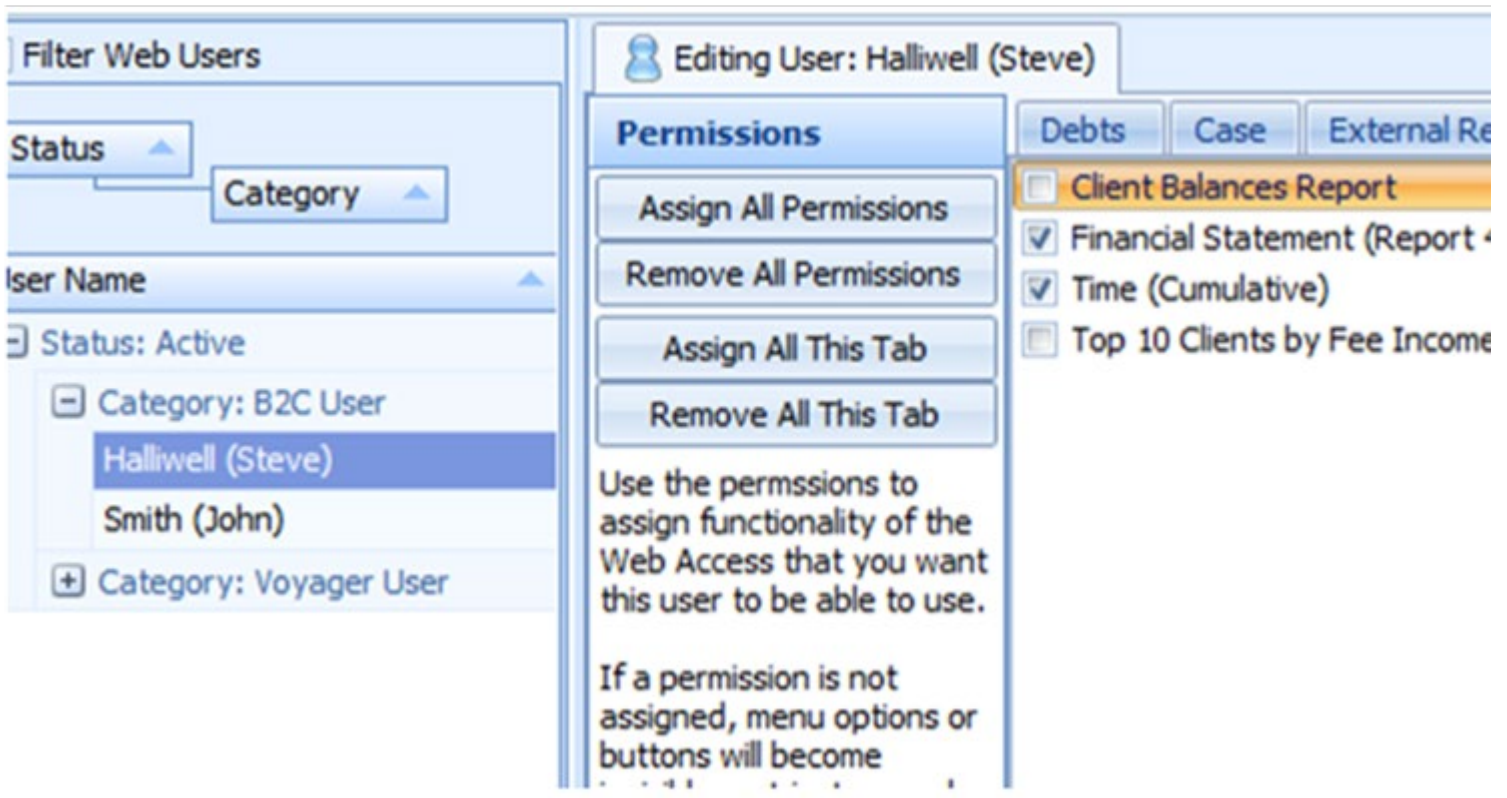
Making Business Intelligence Objects available in B2C

There is a new field “Web Publishable”, in Intelligent Objects maintenance, which can be set to one of the following values:

Web Publishable:	Not available for Web publishing (Default)	
	 Code	Description
Name		Not available for Web publishing (Default)
	A	All (Mobile and Desktop)
	D	Desktop (Full Screen)
	M	Mobile
		

- Not available for Web publishing: This is the default value and means you cannot allocate this against a B2C User.
- All (Mobile and Desktop): This BI Object can be published to a B2C User, and will be available whether B2C is running on mobile or desktop devices.
- Desktop (Full Screen): This BI Object can be published to a B2C User, and will be available only when B2C is running on a desktop device.
- Mobile: This BI Object can be published to a B2C User, and will be available only when B2C is running on a mobile device.

If the above field is anything but “Not available...”, it makes the dashboard/report available in Liberate Admin in “Web User Maintenance”: You can use the new “BI Reports” or “BI Dashboards” tab to publish against specific B2C Web users as per below.



Dashboards and Reports in B2C

The B2C User can access their new dashboards and reports in the Reporting section of B2C.

Watchers

LTRM-123 Added ability to assign watchers to client and case events and track events via dashboards.

- Option to set the Fee Earner and/or the Owner of the Case as receiving the watcher notifications
- Ability to set watchers in case creation process or via workflow, on top of each user setting their own watchers
- Link Watchers and Document Router - e.g. history category 'PostRoom' any documents from Document Router added to that history category, which has a watcher set to the Fee Earner/Owner.

Liberate Administration Utility

Liberate Admin

LTRM-173 Document Packs

B2C and Self-Serve documents allow selection of multiple items. Clicking the download button when one or more files are selected allows the set of documents to be downloaded as a document pack in zip format

LTRM-122 Schema change to support Centralised Licencing for Web Products

Liberate Case Management

General/System

LTRM-137 Added the New Linetime Logo to the About screen of Key Liberate Classic Executables.

Liberate Marketing

Marketing

LTRM-116 Added option to exclude clients from Marketing queries

New option in query builder to exclude client parties from marketing query results

Query Criteria

☒ New Criteria

Criteria Type

☒ Profile ☐ Member

Select Profile Type: ☒ Marketing ☐ Money Laundering

Select Profile or Association: ☒ Profile ☐ Association Data Item:

= Value 1:

Criteria

☒ All ☐ Clients Only ☐ Non-Clients Only ☐ Exclude Attached

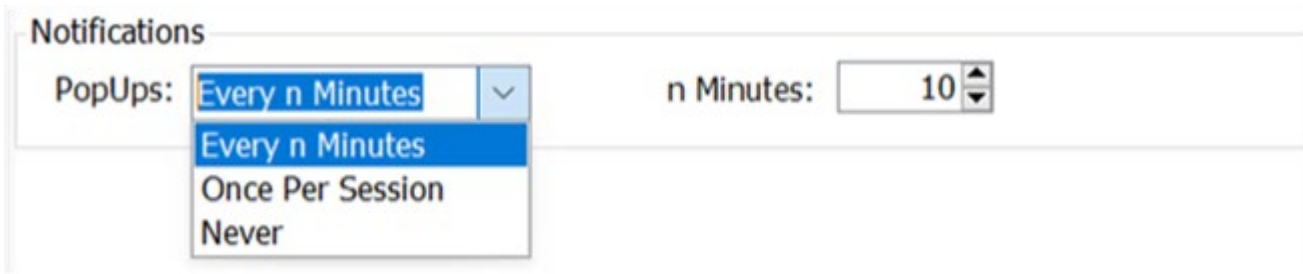
Liberate Outlook 2010 Addin

Collaboration Notifications

LTRM-160 Implemented User and Admin options to grant control over the frequency of Collaboration Notifications.

Administrator Settings

An Administrator can access the following new setting in the Outlook Addin Options window. These provide system default behaviour for all users. The behaviour can be overridden at the user level (see further below).



Notifications

PopUps: **Every n Minutes** ▼

n Minutes: 10

Every n Minutes
Once Per Session
Never

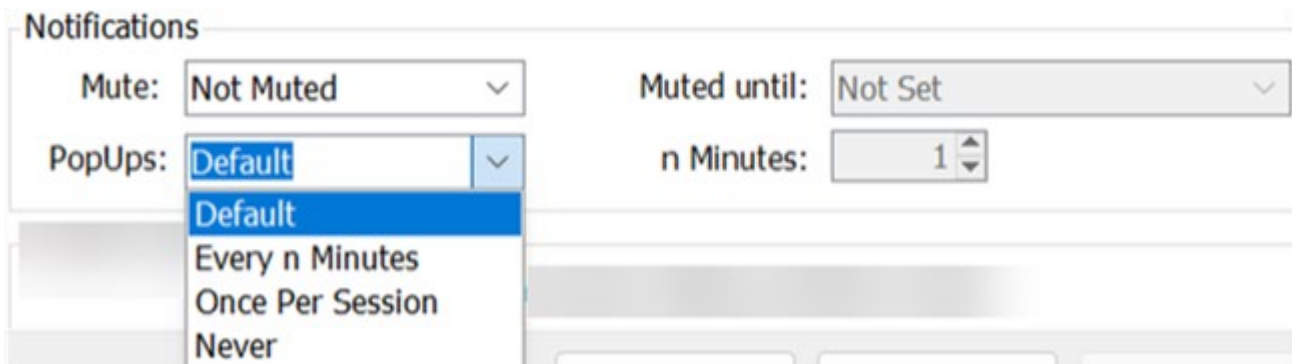
Every n Minutes : Selecting this option, and also setting a number of minutes in the “n Minutes” field, will affect the size of the delay between repeatedly showing the user a notification for the same collaboration. The Addin will wait the specified number of minutes before presenting a notification to the user again. Note that the Addin still checks every minute for new notifications and displays them if found.

Once Per Session : Selecting this option will result in each collaboration notification only appearing once for the duration of their Outlook session. If Outlook is restarted, any unacknowledged notifications will popup once more.

Never : This option prevents any collaboration notifications being shown for all users

User Settings

Each user can access new options within the Outlook Addin Options window



Notifications

Mute: Not Muted ▼

Muted until: Not Set ▼

PopUps: **Default** ▼

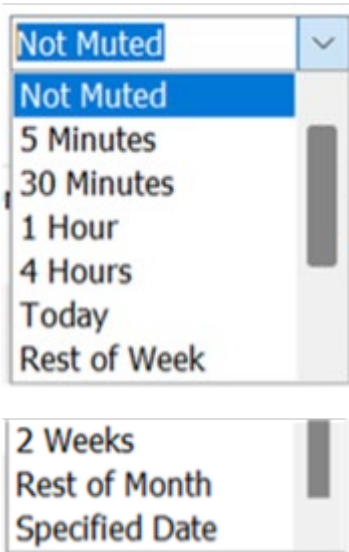
n Minutes: 1

Default
Every n Minutes
Once Per Session
Never

The “Popups” selection present the 3 same options as per the Admin settings - these work as per the Admin settings but provide a User-level override meaning the Admin setting is ignored if these are set. There is one additional option called “Default”.

Default: This setting means the behaviour is inherited from the Administrator settings above. This is also the default setting.

The **Mute** drop down provides a way for users to temporarily put a halt on all collaboration notifications.



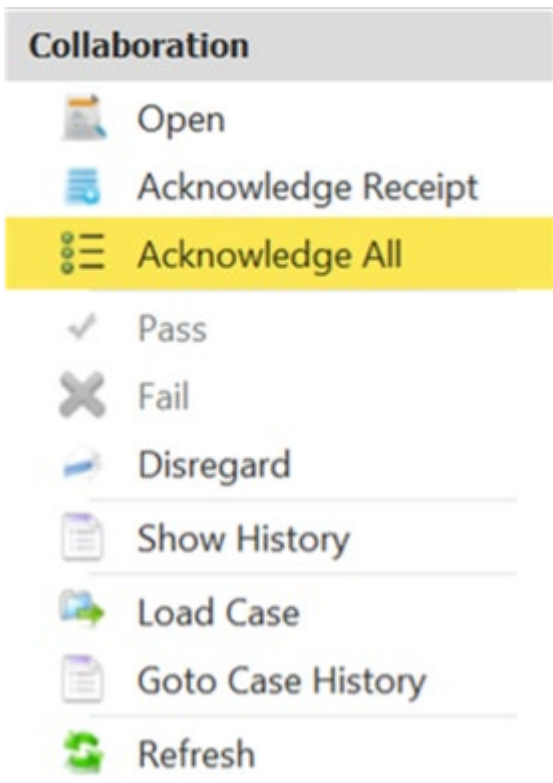
When a user selects one of the timespans from this dropdown, the system calculates the mute end date and puts it into the “Muted until” field. If users select “Specified Date”, they can enter their own end-date into the “Muted until” field.

Once “Muted until” date has been reached, notifications will begin being shown again as per the other settings.

Even when collaboration notifications are not being shown for any reason, the system still polls every minute for new collaborations, adding them into the list in the “Notifications” tab.

New “Acknowledge All” option

A new option has been added to the context menu that appears when you right click any collaboration in the list within the notification tab.



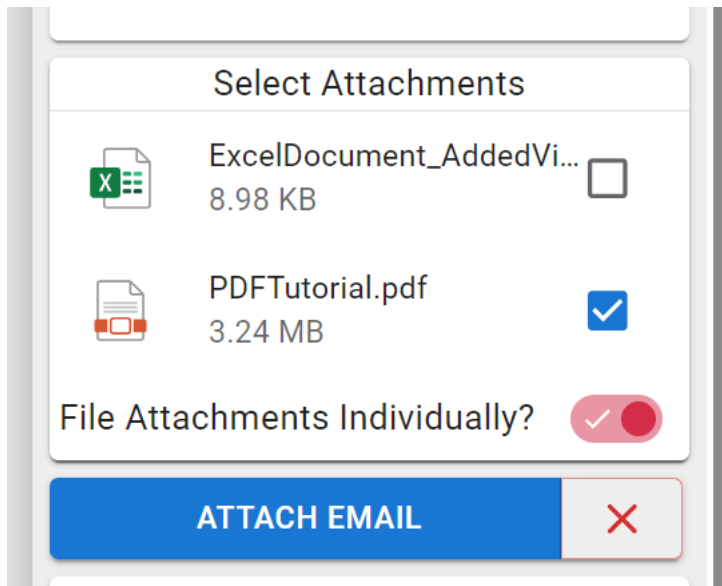
Selecting this option provides an easy way to acknowledge all unacknowledged collaborations currently in the list. As in previous versions, by acknowledging a collaboration the Addin will no longer display a popup notification for it, regardless of any of the above settings.

Liberate Outlook 365 Add-in

Email Management

LTRM-194 Outlook 365 Email-Attacher now allows individual Attachments to be selected and Filed to History.

To provide (File-related) Case History functionality within the Office365 Outlook Email-Attacher, feature added to allow Individual Attachments to be selected, and attached separately to the Email.



Liberate SE

Client/Party Maintenance

LTRM-151 Party Maintenance

Country selected in Region of Operations is set to top of countries list in address country dropdowns with remaining countries in alphabetical order.

LTRM-126 Client/Party Maintenance

Amendment to allow Email Address to be marked as a compulsory field.

DMS - SQL FileStores

LTRM-136 New Document Storage System: StreamLine DMS

StreamLine DMS provides new back-end features and front-end management tools for the storage and management of documents and emails. Built on our existing strongest DMS options, this feature leverages the power of Microsoft SQL FILESTREAMS.

Using SQL FILESTREAMS to store content offers several advantages, especially when it comes to integrating structured database storage with unstructured binary data like documents and images:

- **Seamless Integration:** FILESTREAMS seamlessly integrates binary data storage with your SQL Server, providing a single, unified platform for managing structured and unstructured data.
- **Transaction Support:** FILESTREAM data is included in SQL Server transactions, ensuring data consistency and reliability, which is crucial for applications requiring ACID compliance.
- **Query Capabilities:** You can query FILESTREAM data using SQL queries, which makes it easier to retrieve and manipulate binary data using the power of the SQL language.
- **Security:** FILESTREAM data benefits from SQL Server's robust security features, allowing for fine-grained control over access and permissions to stored content.
- **Backup and Restore:** SQL Server's backup and restore capabilities extend to FILESTREAM data, simplifying data recovery and disaster preparedness.
- **Efficient Storage:** FILESTREAMs optimize storage by combining the advantages of file system storage with SQL Server's indexing and caching, reducing data redundancy and storage costs.
- **Scalability:** SQL Server provides a scalable platform for managing large volumes of unstructured data, ensuring that your application can grow without sacrificing performance. Liberate can be configured to switch to a new FILEGROUP, archiving older ones. You can create rules so that different FILEGROUPS are used for different Case Types and Groups.
- **Integration with Applications:** It's easier to integrate FILESTREAM data with various applications and services, making it a versatile solution for content management; for example, Elastic Search.
- **Data Consistency:** With FILESTREAMs, you maintain data consistency between binary content and related metadata within your database, preventing data fragmentation.
- **Backup and Recovery:** FILESTREAM data can be included in database backups, simplifying the backup and recovery process and ensuring the integrity of your binary content.
- **Compliance:** The legal sector requires strict data compliance and auditing, FILESTREAMs can facilitate compliance management by keeping binary content within your database.

In summary, SQL FILESTREAMS offer a comprehensive solution for managing binary content within the robust framework of SQL Server. Liberate takes the management of SQL FILESTREAMS into our application layer. It combines the advantages of relational database storage with the efficient management of unstructured data, providing a secure, scalable, and integrated platform for content storage and retrieval.

Document Bundling

LTRM-128 Update to Linetime Service

Added support for PDF Bundling on server

General/System

LTRM-277 The Autoupdate process now deletes unused files before updating

General system-maintenance change to prevent old versions of component files, and Files related to external integrations being retained when Liberate is upgraded through the AutoUpdates mechanism.

Integration - iManage

LTRM-276 Linetime Work10 Integration now better handles Custom cloudimanager.com sub-domains.

Support added to Linetime Work10 integration to handle cloudimanager.com feature where iManage clients can create custom sub-domains for the Universal API. e.g. <https://linetime.cloudimanager.com>

LTRM-274 Work10 SDK utilised by Liberate SE updated to iManage latest (& recommended) version 10.9.4.39

LTRM-232 DMS (Worksite v10) - Handling of Author/Operator Disabled error -> Operator re-assignment

When performing actions that affect a Document Profile in Worksite, an error was being returned to the Application in the instances that the Document being affected - is linked to an Owner whose Worksite Operator account has been set to Disabled.

The application logic will now respond to this error with a further request to Worksite Server to re-assign the Owner of the Document to the current Operator making the initial Profile action.

Integration - Infotrack

LTRM-266 Allow for outgoing field "MatterType" to be blank

This change allows specified Case Types to identify as either “Purchase” or “Sale” regarding the InfoTrack link. This enables both the Purchasers and Vendors to populate the InfoTrack SigniT screen in the InfoTrack Portal. How the screen works is that if the matter type is not Purchase or Sale, then InfoTrack display both purchasers and vendors in the payload.

If the mapping for “Search Type” resolves to the word “Blank”, then the JSON Property “MatterType” will be set to “” (an empty string).

Reporting - Suites

LTRM-121 New functionality for SE Teams for Dashboard and Report Allocation.

New radio button for Team available within Dashboard and Report Allocation.

When Team is selected a suite of dashboards, or a suite/individual report can be allocated to a whole team. This differs from the existing Dashboard and Report Propagation, because if a user is removed from the team, if allocated this way. the dashboard/report is also unallocated from that user.

Security/Logon

LTRM-209 Implementation of centralised licensing within Liberate Suite.

Liberate SE Accounts

Autopost

LTRM-106 Autopost

Enhancement. Added ability for held items to progress to the next status level except posted. Also transactions can be held/unheld at its various status levels.

Billing

LTRM-147 Billing Wizard: Added Extended Narrative to Column Chooser in Time Selection

In Billing Wizard you can now pull the Extended Narrative into the Time Selection Grid. Access the column chooser by right clicking on any grid heading, and drag in the Extra Narrative column.

Note that this grid does not remember user customisations, so the column must be added again between sessions.

Credit Control

LTRM-109 LiberateSE

Added filter options when running credit control statements in line with those that exist on bills functionality.

Integration - Make Tax Digital

LTRM-154 LiberateServices - VAT MTD

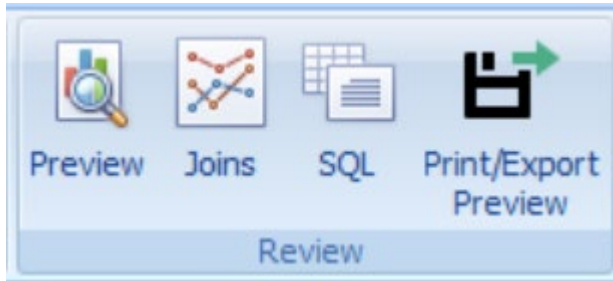
Updated the embedded web browser control used for authorising to use the Edge WebView2 control. Amended submission error messages to give a clearer and more meaningful messages.

Liberate SE Reporting

Reporting - Query Builder

LTRM-146 Added “Print/Export Preview” button to main ribbon in Query Builder

The new “Print/Export Preview” button opens up the standard Print Preview dialog for grids, from which users can print or export the results in the Preview grid.



Schema

Schema Generation

LTRM-227 No longer treat Police Station Fees as standard data

The schema program will no longer update data in this table during a schema upgrade. This will preserve any amendments to the table that clients have made. It will be up to all clients to maintain the contents of this table themselves going forward.

Total number of Features and enhancements : 25

Resolved issues

Liberate Administration Utility

LTRM-139 Perfect Portal Integration

Perfect Portal sub case types can now be mapped to Liberate case types and imported into Liberate under their own case type.

Case Maintenance

LTRM-243 Fixed error with fee earner case move when more than 1 case was selected.

General/System

LTRM-252 Forms Mappings

Added code into replication on Single Item, Multiple Items, Create New Case and Full replication to allow for FormsMappings.

Integration - A2A

LTRM-224 Thirdparty Credential Maintenance

Fixed issue with A2A username/passwords saving to wrong fields under some circumstances and made it harder to A2A passwords to be changed without user intervention.

Liberate Case Management

General/System

LTRM-261 **User & Fee Earner maintenance no longer replaces apostrophes with backwards apostrophe character in Letter Title and Email address. Now handled correctly on save.**

Liberate Debt Collection

General/System

LTRM-202 **Fix in LiberateCM.exe to payments showing on SOA grid multiple times if payment is allocated to more than one invoice**

Liberate Marketing

Collaboration Notifications

LTRM-43 **Fix to send notification when Client Connect amendments are rejected.**

Liberate Outlook 2010 Addin

Email Management

LTRM-246 **Introduce Workaround for MSG file not opening correctly**

We have implemented a workaround for this new issue in Outlook - by implementing an extra save of the email in it's originating mail folder, before it is saved out as an msg file. This will not impact emails that were saved prior to this version.

Liberate Outlook 365 Add-in

Office Addin - Outlook

LTRM-196 Outlook 365 Add-in Login process

Improvements to the login process when initially accessing the add-in, or following a Logout.

The 'intermediary' UI following login but before the Add-in has fully loaded, which previously displayed a holding item (Home Authenticated), has been improved to display a Getting ready message aligned with other UI items..

Liberate Practice Management

General/System

LTRM-239 Corrected handling of apostrophes in Utilities.exe

Now does not replace apostrophe's with backwards apostrophe in Forename and Surname on both FE Maintenance and User Maintenance. Handles apostrophes correctly on save.

Interest Calculator

LTRM-258 Global Interest Calculator now correctly handles interest already paid

LTRM-40 Fixed error that could occur when running "Global Interest" on systems with fully numeric client codes at least 10 digits long.

Nominal Postings

LTRM-94 NomPost.exe

Transaction confirmation message shown is now shown after posting but prior to print screen.

Reporting (Classic)

LTRM-197 Fix in Query.exe to error message when attempting to export RepGen reports to Excel.

Takeon - Transactions

LTRM-96 Transaction Gateway

Importing data through Transaction Gateway now allows up to 90 characters on Extra Description.

Liberate SE

Autopost

LTRM-241 Fixed issue with posting in autopost after editing a transaction

LTRM-237 The context menu now shows the Autopost options for all columns, where previously it would show a different context menu for text fields.

Billing

LTRM-135 Fix in Billing Wizard to write off category not showing in Ledger Enquiries for time entries that were written off.

Case Maintenance

LTRM-259 Fixed to issue where portfolio case creation would not allow plot numbers to start with alpha characters and contain special characters when not using prefixes.

LTRM-205 Case History Filter Pane not Visible

Fix to issue when viewing combined history on a case using portfolio structure and then closing the case and loading a standard case, the filter pane would not be visible. Filter pane and now visible on history when loading a standard case after loading a portfolio and case and viewing combined history.

LTRM-179 Amended case maintenance to allow plot number allocation when using the subordinate case structure.

LTRM-174 Undertakings

When an Undertaking is given on a case/matter and that case/matter is moved to another client, the record of the Undertaking at Command Level now correctly displays the new Client No/Matter No

Client/Party Maintenance

LTRM-199 Party Take-On

An additional module has been added to Liberate Take On - Party Take on.

This works in the same way as other data import options within Liberate SE in that you use the CSV Mapper to map the relevant fields and import into Liberate using 'Liberate TakeOn' found within the 'More' tab at Command level.

Credit Control

LTRM-250 Fix to error when running Credit Control Processing stating there is already an object named '#W1' in the database

LTRM-200 Performance increase to bill book grid

Added an index to Notes table to increase performance.

Document Bundling

LTRM-204 Fix to contents page incorrectly nesting empty sections inside each other and also fixed incorrect page numbering.

Document Production

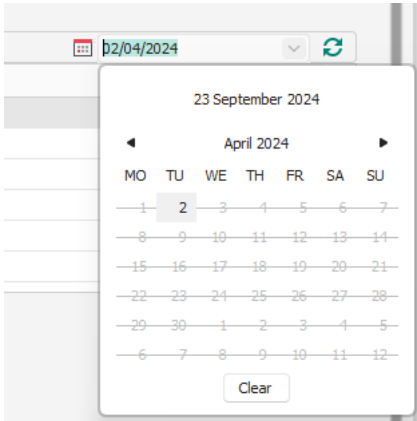
LTRM-98 Fix to an extra carriage return being left in merge code blocks after conditional check is processed.

Elastic Search

LTRM-172 Improved queries accessing Audit Data for the Elastic Tools applications

The querying of Elastic Tools audit data has been changed to improve Form Load-times and prevent time outs when Server under load.

A Calendar control is available on the Elastic Audit data grids which allows date selection, and only displays Dates where data has been recorded.



Email Management

LTRM-131 Fix to incorrect email subject when generating an email via a workflow on Laundering cases.

General/System

LTRM-235 Better organisation of Deployment Files for Work10 Support to prevent File-related issues during product Installations.

Following the iManage Work10 SDK upgrade to v10.9.4.39, the component files for the SDK (provided by iManage for connectivity into the Work10 Universal API) are now deployed by Liberate applications into a Sub-Folder within the Installation directory - to alleviate Installation-related complications.

v2.0.59 (and onwards) of LiberateWorksite.DLL will load the Work10 binaries from the Sub-Folder: Work10 Assemblies.

Integration - CloudForms

LTRM-140 Added ability to submit CloudForms and FormEvo submissions from a workflow.

Integration - FormEvo

LTRM-175 Fix to error message submitting FormEvo forms if form name starts with a character then a number.

Integration - iManage

LTRM-216 Correction for filing Documents (already associated with a SYSTEM category) into (Worksite) Workspace Folders

Precedent Maintenance within Liberate Admin allows a Default Folder to be specified against a Precedent Document.

This worked ok, except for Documents such as those in the BILLING category - where the Documents already get filed to a specific Folder within the SYSTEM folders.

Now corrected - Documents with an associated SYSTEM category, can now also have a default Folder assigned within Admin. A Document reference will appear in both Workspace folders.

LTRM-203 Improvements when attaching Emails to Case History via Worksite Sync.

Liberate to Worksite component improvement.

New logic to improve Email handling during the Sync, for both MSG-based Emails, .MSG Files, .EML-based Emails, .EML Files:

- History date should be the email sent date (not the created date from the document profile)
 - When receiving a .MSG **File** or .EML **File** (i.e. an email initially saved to file-system before attach to iManage), logic now correctly gets the Email Subject opposed to the FileName
 - WorksiteSyncResolvesEmailDirection now honoured for .EML emails and .EML files.
-

LTRM-145 New better performing Work10 Full Sync + General Corrections

- Introduction of a more efficient Full Workspace Sync routine. This logic uses 'Folder Search requests' instead of getting the Folder With Operations objects (which is a one Folder per API call request model). This means that the Sync cannot align Class/Subclass data on the Folder Profiles - functionality associated with ZO [72615999](#). The Class/Subclass sync is now a final stage of the sync, driven by Folder with

Operations objects, but only those where we identify a History category with Class/Subclass data assigned, and the ZO is enabled.

- Added improved handling for iManage Rate-Limiting: New checks on x-ratelimit-reset Header when a 429 received. Introduced new LiberateSEVars entries: Work10NumRetries429, Work10RetryWait429, to determine the default wait time (if one cannot be interpreted from the iManage Header).
- The iManage Attribute Custom17 is now properly handled as a Double data-type.
- Better handling of RefreshToken logic to ensure more seamless operation. Also, in the instance that a Token Refresh call to Work10 fails, the application will automatically try to login again.
- Now Liberate Classic is Work10 compatible, if Liberate Classic requests Document Version 0[zero], any checks using the Archive Database will be properly converted to version 1.
- New optimisation that prevents the Workspace object being retrieved after its creation - the Create call returns the Workspace object - prevents a timing issue where retrieval immediately after the create call can fail.
- A 404 (Not Found) response when attempting to Remove a Document from a Folder should not display Error Message.
- Improved Sync Logging to assist problem diagnosis.
- Trim of the Worksite Folder Name when checking Document Categories, to prevent problems where a folder has been created with a Space character at the end.
- Fix to the query (WorksiteWorkspaceSync) to use client/case columns instead of custom1/custom2.
- Fix to identify History Category using Workspace Folder Id, comparison needs to ignore case.

Integration - Infotrack

LTRM-262 Fixed Mappings for Literals in InfoTrack Mappings

You can now map to Literal values in third party mappings for InfoTrack integrations.

Integration - Perfect Portal

LTRM-177 Perfect Portal Integration

Improvement made to speed up the Perfect Portal Import load and fix to client party import to get correct date of birth.

Purchase Ledger

LTRM-275 Schema Change

Synchronise table column widths to prevent truncation error when saving bank account details

LTRM-251 Resolved issue with invoice payments. System now excludes unpaid disbursements as

expected.

resolved issue with invoice payments. System now excludes unpaid disbursements as expected.

QuickSearch

LTRM-269 Quick Search - Party Categories

The result of a Party Categories search now displays what is detailed in the 'File As' field on the party record (if completed) If not, the party name field in the search reflects the party details in other areas of the system

LTRM-120 New LiberateSEVars parameter prevents the QuickSearch dialog in Windows App Bar rather than floating.

Introduced LiberateSEVars parameter for the 'Application' User: QuickSearchShowInTaskbar Y/N

(N represents the previous default behaviour, and is the default if No parameter instance is defined).

This change allows the QuickSearch dialog to be presented within the Windows App bar, and also causes the Windows App bar entry for Liberate SE to Flash if the Operator attempts to interact with another Liberate Form while the Quick Search is locking it out (because it's Modal).

Reporting - Dashboards

LTRM-230 Fixed issue where Dashboard could appear blank

When switching between suites containing multiple panels, sometimes the wrong panel is left with focus, so it appears blank until switching panels. This has been corrected.

LTRM-141 Fixed error that could occur when exiting Ledger Enquiries -> All Transactions

When exiting All Transactions, if a transaction was selected first the application could error and shutdown. The error only occurred after entering Ledger Enquiries directly from a Dashboard drill down.

Takeon - Transactions

LTRM-228 Fixed issue with client/case update when some unmapped numeric items are wrongly updated with values of 1.

Time Recording

LTRM-166 Time Review

Time on private cases not accessible to user are not considered when reporting on unposted time on application exit.

LTRM-138 Case/Matter Maintenance

When transferring a matter to a new client record non converted time now updates with the new case details.

LTRM-133 Fix to error entering time recording notes.

WorkFlow

LTRM-233 WorkFlow (Type 97 Exchange Emails) - Correction to prevent complications with multiple Outlook Contacts.

Adding new Contacts to a Users Email Profile (within Exchange, or within desktop Outlook), could create issues when sending Emails on behalf of the User during WorkFlow Type97 actions.

The Liberate Users email is now used to match the Contact email addresses (which is used by Exchange to determine the Email Sender).

LTRM-178 Action type 93 now allows for the creation of Self-Serve entries via workflow.

LTRM-134 Table Type 5 controls shown in workflow now show individual column entry items as defined in the table definition or shows the the whole control when no sub item is defined.

Liberate SE Accounts

Credit Control

LTRM-132 **Fix to credit control outstanding amount not taking into account write-offs and credit notes.**

Electronic Payments

LTRM-143 **Electronic Payments**

Drilling into processed payments in Review Batches module in Electronic Payments now returns the liberate User ID rather than the PC ID.

Transactions - Accounts

LTRM-238 **Credit Control Warning**

Fixed issue with credit control warning flag not being processed correctly and incorrectly displaying a warning on post of an office credit.

Liberate Word 2010 Addin

General/System

LTRM-240 **Fixed Options Form reverting SQL User to Liberate**

Fixed issue where the Add-in Options form shows LIBERATE as SQL User after it's been blanked. This could result in the SQL User being erroneously set back to LIBERATE if the form was visited and saved multiple times.

Schema

Purchase Ledger

LTRM-242 Added schema changes to expand column widths to accommodate the extra information stored for clearer auditing.

Reporting (Classic)

LTRM-236 Fixed issue in Standard Report 331 - Practice Management Time Analysis

Fixed issue with previous period data not returning values.

Smart Connect

Smart Connect

LTRM-234 Fixed inconsistencies between SE and the API when updating Table Type 5 items.

LTRM-223 Smart Connect attach party to case

The scoping for contact category group and case type is now the correct way around

Unified Web

General/System

LTRM-265 Voyager Fixes

Checking a document in/out in Voyager works correctly.

Saving client information in Voyager now saves correctly.

LTRM-257 Columns 2 and 3 on a custom case screen now create the SQL correctly when using TT3 data.

Security/Logon

LTRM-206 Sign In Using Keyboard

Unified web products now correctly interpret the Enter keypress as “Next” when signing in.

Total number of Resolved issues : 61

Total number of changes : 86

Important Update: Centralised Licensing System Implementation

We are excited to announce a significant improvement to our licensing model for our .NET product line. This update introduces a new, centrally maintained licensing system that offers greater flexibility and ease of use for managing your product licenses.

This licencing system requires a connection using the standard port (443), which must be open on your network (Port 443 is open by default on most systems), otherwise it will need to be opened on at least some machines that run the .NET software regularly so that licence updates happen, and the licence doesn't fall out of date.