

Ireland Quick Reference Guide

This Quick Reference Guide includes a summary of enhancements and a checklist of tasks to be completed pre and post your upgrade to the Ireland release. Complete the Pre-Upgrade Tasks first, perform the upgrade to Ireland, and then complete the Post-Upgrade Tasks to ensure your firm receives full benefit from the enhancements outlined below.

For a more detailed explanation of each step, see the [Ireland Release Notes](#). If you require further assistance to set up any of these tasks, please contact the LawMaster Helpdesk through the online portal.

Pre-Upgrade Tasks

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|---|---|--------------------------|
| 1 | Upgrade Advanced Searching (Elasticsearch) to version 7.17.12 where applicable. | <input type="checkbox"/> |
| 2 | Ensure all folios are checked in prior to upgrading. | <input type="checkbox"/> |
| 3 | Confirm all WP Forms are converted to DOCX format. | <input type="checkbox"/> |
| 4 | Verify desktop and server environments meet Ireland release requirements. | <input type="checkbox"/> |

Post-Upgrade Tasks

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|---|---|--------------------------|
| 1 | Review updated parameters introduced with the Ireland release. | <input type="checkbox"/> |
| 2 | Set the 00-SIGNIT parameter to control Infotrack SignIt signer behaviour. | <input type="checkbox"/> |
| 3 | Confirm Elasticsearch indexing has completed successfully. | <input type="checkbox"/> |
| 4 | Review document archiving, billing, debtor and trust reporting workflows | <input type="checkbox"/> |

Release Enhancements – At a Glance

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|---|---|
| 1 | <p>Accounting General</p> <p>Updated Validation for NZ Bank Accounts – NZ bank account validation updated to align with current IRD and Payments NZ standards, with clearer validation messaging.</p> |
| 2 | <p>Accounts Payable</p> <p>Voucher Payments Now Support Unlimited Direct Deposit Transactions – Removed limits on the number of vouchers that can be processed in a single direct-deposit run.</p> |
| 3 | <p>Cash Receipting</p> <p>Receipt Drawer Details Now Media Type Aware – Receipt drawer and received-from details now reflect the selected receipt media type.</p> |
| 4 | <p>Client and Matter Maintenance</p> <p>Client Matters Tab on Recent Matters – Resolved issues where the Client Matters tab could display blank or lose state.</p> <p>Last Activity Date Available in Matter Search Grid – Added a Last Activity column to provide visibility of recent matter activity.</p> <p>Matter Menu Now Expands Fully on Selection – Matter Menu now consistently opens at full width.</p> |

Bulk Modify File Location Now Available for Archived Matters – Allows bulk updating of File Location for archived matters.

5 **Costing and Billing**

New WP Form BB – Bill Fields – Added new static fields for debtor balance, billing entity details, and work type description.

Masterpiece – Export Bills and Adjustments – Corrected ordering issues to ensure consistent billing exports.

Bill Amounts Align with Values Reported on WP Form – Ensures WP Form bill totals now match debtor transaction values.

6 **Debtor Management**

Debtor Transaction Enquiry – Allows manual selection of reporting year when reviewing debtor transactions.

Debtor Aged Trial Balance Update – Corrected messaging and improved visual consistency in debtor aged trial balance reports.

7 **Document Management**

Omnisearch – Improved Handling of Operators – Improved handling of Elasticsearch operators to reduce search errors.

Deleted Folios Skipped During Elasticsearch Index Rebuild – Deleted folios are no longer re-indexed during ES rebuilds.

Folio Searching Wildcard Parameter Aware – Word-in-text searches now respect wildcard settings when ES is enabled.

Referrals Grid Enhancements – Improved referrals grid clarity and added read/unread status.

Support for Files Greater than 2GB – Added support for handling non-email files larger than 2GB.

Browse Folder Window Consistent Across LawMaster – Standardised folder selection experience across the system.

Folio View Context Menu Options Disabled – Context menu options disabled when no folios are present.

Improved Matter Template Hierarchy View for PT Parameters – Matter Template hierarchy now reflects configured PT structure.

Improved Handling of Document Check-In and Check-Out – Prevents document actions when user sessions are invalid.

Improved File Naming Convention for Exported Files – Exported file names are preserved more accurately.

WP Forms Converted to Open XML – WP Forms now default to Open XML processing.

Enhancements to WP Form PA – Payment Advice – Added new fields and masking logic to bank accounts in payment advice forms.

Sensitivity Label Management (MIPS) Mail Merge Support – Enables Sensitivity Label selection during Mail Merge.

Resolved COM and RPC Errors in Folios Export/Print – Resolved COM and RPC errors during folio export and print.

Email Preview Reliability Improvements – Improved reliability and fallback handling for email previews.

Folio Enquiry Search on Number – Resolved errors when searching folios by number.
Resolved Issue with Modifying Date of Writing – Date of Writing is now retained when saving emails.

Improved Error Handling for Exporting Folios to PDF – Provides clearer messages when folios cannot be combined.

WS Form Processing Incorrectly Blocked – Resolved issue where WS Form merges were blocked.

Improved Error Handling for Folio Attachment Creation – Improved validation and messaging for folio attachments.

8 **Integrated Searching**

GlobalX Renamed to Search Manager 22 Dye & Durham – Updated naming while preserving existing search functionality.

Improvements to SignIt Integration for Infotrack – Improved signer selection and validation based on parameters.

Infotrack Credentials Handling Improved – Firm-wide Infotrack credentials now apply consistently.

9 **New Client Enquiry**

New Client Enquiry Search Function – Resolved errors encountered during new client enquiry searches.

Word in Text Search Expanded – Expanded search to include enquiry details and wildcard support.

10 **Lawyers Workbench**

Enhanced Work Unit Bring-ups Search – Improved visibility and filtering of bring-ups by work unit.

Bring-ups Inherit Security Restrictions – Bring-ups now respect associated record security settings.

11 **Outlook**

Improvements to Duplicate Email Detection – Improved duplicate detection when Safe Links modifies URLs.

EML Emails Converted to MSG – Dragged EML emails are now converted from EML to MSG.

Resolved Outlook Email Null Reference Error – Fixed errors when replying to or forwarding certain emails.

Debug Logging Added for Outlook – Added diagnostic logging to assist troubleshooting.

12 **Payroll**

Employee Superannuation Advice Enhancements – Improved coverage of superannuation advices, including terminated employees.

Anniversary Report Date Range Inclusive – Anniversary reports now include both start and end dates.

Lump Sum D Payments Grouped – Lump Sum D payments are now grouped in STP Phase 2.

13 **Records Management**

Archive Documents Module Enhancements – Renamed and enhanced archiving workflow with improved visibility.

File Size Column Added – Added file size visibility when selecting documents for archiving.
Archive Pre-Selected Documents Enhancements – Improved batching, locking, and reliability when moving archived files.

Store/Location Column Added – Displays store or location details in File Requests.

14 **Resource Management**

Author Performance Data Improvements – Improved clarity and naming of performance metrics.

YTD New Matters Added – Added year-to-date new matters column to reports.

15 **System Administration**

Matter Details Database Aware – Prevents loss of matter details when switching databases.

Unique Grid Layout Names – Grid layouts now save independently per module.

Expanded Save-to-Folio Formats – Users can now save output as XLSX, PDF, or XML.

MS Report Viewer Upgrade – Updated reporting components and Excel exports.

Remote Code Restrictions – Restricted remote code execution to improve security.

Enhanced XSS Protection – Strengthened defences against cross-site scripting attacks.

Technology and Components Updated – Updated core libraries and dependencies.

Client Web Access UI Enhancements – Improved error handling for CWA configuration issues.

Elasticsearch Upgraded to 7.17.12 – Upgraded Elasticsearch to supported versions.

Password History Validation Enhanced – Improved usability of password reuse validation.

Folio Viewer Window Centred – Folio Viewer now opens centred to its parent window.

Improved Window Focus Behaviour – Floating windows no longer force the main app to the foreground.

Font Size Consistency on Export – Resolved font size changes during folio export.

Classic Interface GUI Deprecated – Removed support for reverting users to the Classic interface.

Work Type Parameter Help Updated – Updated context help for Work Type parameters.

PROADM Password Not Remembered – PROADM credentials are no longer saved on login.

Document Groups Field Length Increased – Increased field lengths for Document Group parameters.

Job Scheduler DateTime Validation – Added validation for future-dated job scheduler logs.

Job Scheduler DMS Control – Ensures only the designated DMS triggers scheduled jobs.

Scheduled Re-Build Index Job – Added scheduled database reindexing in LM Admin.

LawMasterWebAdmin Compatibility – Restricted WebAdmin usage to supported browsers.

Improved NZ Date Handling – Standardised date handling for English (NZ) regional settings.

16 **Trust Accounting**

Trust Ledger Report Ordering – Trust reports now display transactions in correct input date order.

Trust Report Field Capacity Increased – Expanded client and matter field lengths in trust reports.

Trust & Investment Balances Improvements – Improved wrapping and field capacity in trust balance reports.



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Print Trust Balances Improvements – Enhanced readability with expanded fields.
Controlled Funds Report Improvements – Increased field capacity for controlled funds reporting.

Prepared By Field Added – Added Prepared By field to key trust reports.

WP Form TR Bank & Branch Fields – Added bank and branch name fields to trust requisitions.

17 **Workflow Development**

Actioning Tasks Through Events – Resolved duplicate key errors when actioning tasks via Events.
