

LawMaster Release Notes

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Release: Cuba

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Important Notice – Upgrade Path

Please read all release notes between your current version and the version you are installing to ensure you are aware of all changes and setup requirements between these versions and that you install and test (see suggested testing protocol at the end of this notice) in your Training database before upgrading Production.

Supported upgrade paths for Cuba Onwards

The following are supported upgrade paths to Cuba onwards:

- ❖ *If you are running Canada R2, Portugal or Portugal R2 you can upgrade directly from your current version to Cuba.*
- ❖ *If you are running a version earlier than Canada R2:*
 - You must first upgrade through each public release to get to Canada R2. *For example, for releases prior to Canada R2, if there are publicly released versions A, B, and C available, you cannot upgrade directly from A to C. You need to upgrade from A to B, and then from B to C.*
 - After stepping through each upgrade to Canada R2, you can then upgrade directly to Cuba.

Advanced Searching

If upgrading from any version prior to Portugal, you must upgrade the Elasticsearch to Version 7.7.1. This is a manual upgrade process details of which are outlined in the [Advanced Searching White Paper](#) available from the Client Service Centre ➔ Releases.

Pre-Upgrade Tasks

❖ Upgrade Advanced Search

If upgrading from a database version **prior to Portugal** that is running Advanced Searching using Elasticsearch, migrate Elasticsearch Index to Version 7.7.1 following the process outlined in the [Advanced Searching White Paper](#) available from the Client Service Centre ➔ Releases. Further information regarding the upgrade can be found in the [Portugal Release Notes](#).

For hosted clients this will be done as part of the normal upgrade service.

If you wish to test the Elasticsearch migration on a non-Production database, please contact your Account Manager for assistance.

❖ Check-In Folios

We recommend all folios are checked-in prior to upgrading to Cuba if coming from a version earlier than Portugal R2. Additional logic has been added to the check-out functionality around the handling of special characters in file names that may affect the ability to check-in files that were checked-out at the time of upgrade. If this does occur and the user is unable to check-in their file, the user will need to rename the file in their checkout folder to that detailed in the Working Folder of the Folio record. (53571)

Post-Upgrade Tasks

❖ Payroll Classification Code ([56987](#))

❖ Folio Viewer Registry Settings have been deprecated. Automatic installation files may need to be modified to take into account these settings are no longer updated by LawMaster. ([58466](#))

Summary of Changes to Security Settings

❖ New **Remove Spaces from Entity Name** module ([58512](#))

❖ Remove **Submit STP Update** module from Main Menu ([57348](#))

❖ Remove **Submit EOY Finalisation Declaration to the ATO** module from Main Menu ([57348](#))

Summary of Changes to Parameters

❖ Cessation Type Codes ([55651](#))

❖ Payroll Tax Scale Parameter ([56440](#))

❖ Payroll Classification Code ([56987](#))

❖ Payroll Payment and Deduction Codes parameter ([57528](#))

❖ Timeout for Convert to PDF via Export ([56425](#))

❖ Authentication Options Parameter ([58043](#))

❖ Graphical User Interface Parameter ([58881](#))

New or Updated WP Forms

- ❖ WP Form SYS – System Control Report ([57300](#))
 - ❖ WP Form PPA – Payroll Advice ([57331](#))
 - ❖ WP Form PPR – Print Employee Details ([57471](#))
-

Known Issues

The following are known issues in the current release:

- ❖ Where the user has Express Viewer for PDF turned off and the Preview pane is selected, focus is lost for up and down arrows when a PDF folio record is selected. Users need to re-select the next folio record using the mouse to continue moving up and down with the arrow keys.
-

Operating system requirements & supported platforms

With the introduction of Microsoft's new set of products and deployment practices, we reviewed our support policy and will be using the following support policies as we develop future versions of our product.

These policies are based on information available on the Microsoft Support Lifecycle site, <https://support.microsoft.com/en-us/lifecycle>.

The purpose of publishing these policies is to ensure clients can plan appropriately when upgrading versions of LawMaster.

Introducing New Microsoft Products

LawMaster aims to commence support for the latest versions of Microsoft tools and systems used with our product 12 months after Microsoft commences "Mainstream Support". We note that if the latest version of Windows 10 or Windows 11 on the General Availability Channel or Microsoft 365 Apps on the Semi-Annual Enterprise Channel is available within two months of the subsequent LawMaster release we will have the opportunity to test against this version.¹ The time lag after the new product support commences depends on the scale of impact of the changes in Microsoft's product on LawMaster. We are continuously reviewing the support periods for the Microsoft product range that fall under the Modern Lifecycle Policy therefore these periods may be subject to change with each new release. We suggest you maintain products under these policies at the version we have tested against as we cannot guarantee compatibility with future versions.

¹ Currently, if a Microsoft Version is released, for example, in February and the Next LawMaster Version will be released in July, testing will not be completed against the February version until at the earliest May when regression testing commences

Phasing out Older Microsoft Versions

Conversely, when a Microsoft product or service moves out of “Mainstream Support”, as defined by Microsoft’s product life cycle, we will no longer support these versions for future releases.

Earlier versions of LawMaster running on older Microsoft products are supported whilst the LawMaster version remains supported, but because of Microsoft's "Extended Support Phase" only providing paid support, additional costs might be incurred if Microsoft support becomes necessary.

The following table provides a summary of our support by Microsoft product. Where a LawMaster Version Name is noted, support ends on release of that Version. Where the end date for mainstream support is beyond our current version plans, an estimate of the likely date of release is included.

IMPORTANT NOTE:

- ❖ **LawMaster versions from 10.14 onward must install .NET 4.8 or later on the server and .NET 4.8 (runtime) or later on the client systems.**

Cuba Release

Microsoft Product	Microsoft Support End	Mainstream	LawMaster Support Ends (by Version Name or Date)
Windows Server			
<ul style="list-style-type: none"> LTSC (not SAC) Non IOT Editions 			
2016 Server		11/01/2022	April 2022
2019 Server		09/01/2024	April 2024
Microsoft SQL Server			
<ul style="list-style-type: none"> Standard or Enterprise Edition GDR Updates 			
2016 SP3		14/7/2026	November 2026
2017		11/10/2022	November 2022
2019		14/01/2025	April 2025
Windows Desktop			
<ul style="list-style-type: none"> Pro or above 64-bit General Availability Channel or Semi-Annual Channel 			
Windows 10		10/05/2022	June 2022
<ul style="list-style-type: none"> Version 20H2 			
Windows 10		13/12/2022	January 2023
<ul style="list-style-type: none"> Version 21H1 			
Windows 10		13/06/2023	July 2023
<ul style="list-style-type: none"> Version 21H2 			
Windows 11		10/10/2023	November 2023
<ul style="list-style-type: none"> Version 21H2 			
Office Installations			
<ul style="list-style-type: none"> 32-bit / 64-bit Installed on PC Semi-Annual Enterprise Channel for MS 365 Apps 			
Office 2019		10/10/2023	November 2023
Office 2021		13/10/2026	November 2026
Microsoft 365 Apps		13/09/2022	October 2022
<ul style="list-style-type: none"> Version 2102 			
Microsoft 365 Apps		14/03/2023	April 2023
<ul style="list-style-type: none"> Version 2108 			

Release Enhancements

Remarks	Request No.
Cash Payments	
Direct Debit File Ordering	56942
Database queries used to generate APCA and NZANZCSV files are now explicitly ordered to match their respective file formats.	
Client and Matter Maintenance	
New module to remove spaces from entity name fields	58512
A new module has been added to Main Menu → System Maintenance → Integrity → Entities called "Remove Spaces from Entity Name".	
This module removes leading and trailing spaces from Entity First Name and Surname. The module input screen provides two options for selection:	
<ol style="list-style-type: none">1. List Only - default2. Update as Well	
On selection of update, the leading and trailing spaces will be removed from the Entity First Name and Surname fields and the Mailing Name and Entity Name fields are re-generated without the spaces.	
We recommend users run this module when there is no-one in the system.	

Costing and Billing

Invoice cost transactions not appearing on Bill in date order

57536

Corrected an issue where invoice cost transactions were intermittently not appearing in date order. Cost transactions listed in Table 2 of WP Form BB are now explicitly sorted by date order.

Validation added for Reserved Words in Cost Transactions

57734

Use of Reserved Words in cost transactions caused unbilled disbursements to display incorrectly.

Validation has been added to the Cost Journal Input and Modify Cost Transaction forms to ensure users are unable to add a narrative to the Remarks field that commences with reserved words "Reverse", "Transfer" or "Split".

The error message is displayed as follows "The word 'Split' is reserved and cannot be entered at the beginning of the Remarks field."

Debtors

Invoice Adjustments on GST are reporting incorrectly in Masterpiece Feed File

57293

Corrected an issue where if GST only was credited to an invoice via Debtor Journal Input, the transaction incorrectly appeared in the Masterpiece export feed file as a debit.

Document Management

Template field in Forms now accepts Form ID in any Case

56308

Corrected an issue where WP Form Template Variables were missing if WP Template was not referred to in capital letters. Users can now enter a WP Form Template in either upper, lower, mixed, or camel case and the WP Form will be recognised.

Validation has been added to the WP Form dialog if an invalid WP Template code is used.

If Custom Document Property is disabled do not run refresh of TOC

57401

Automatic refresh of Table of Contents is disabled where Custom Document Properties is disabled.

Folio Enquiry using Elasticsearch not returning results for Blacklisted File Types 59023

Blacklisted file types were not included in the indexing process for Elasticsearch and were therefore not returned in Folio Enquiry searches. On upgrade to Cuba, blacklisted file types will be re-indexed and the precis able to be queried from Folio Enquiry.

Resolve "Index outside the bounds of the Array" error on Login 58445

Corrected an issue where user was presented with an "Index was outside the bounds of the array" error at the time of login. Issue was a result of the Checkout file becoming corrupt where auto check-in was enabled.

Emails with Inline Images are no longer flagged as Attachments

Resolved an issue where emails were being flagged as having an attachment where in-line images were used.

Integrated Searching

Upgrade WebBrowser to WebView2 for GlobalX Search Integration 57689

The WebBrowser control has been replaced with WebView2 to navigate to GlobalX URLs.

Update references from SAI Global to Dye & Durham 58223

References have been updated from SAI Global to Dye & Durham in the following areas:

1. SPR Parameter - modified Description to "Dye & Durham" where Par_Type = SPR and Par_Code = SAI
2. Job Scheduler - Where Job Search Provider = "SAI" in Details field, modified:
 - a. Job Name to "Search Providers - Dye & Durham"
 - b. Description to "Check if there are Dye & Durham search responses"
3. Searches tab - Context Menu selection "New Search" - modified option for "SAI Global" to Dye & Durham"
4. Searches tab - Context Menu selection "Check Responses" modified option for "SAI Global" to Dye & Durham"
5. Search Provider Mappings - displays Parameter Description rather than Parameter Code for all rows including SAI, Infotrack and GlobalX.

On upgrade, clients to update Base URL and Response URL if not already done.

Knowledge Management

Omni Search 58488

A new search control has been added to LawMaster that allows users to perform searches across multiple categories at the same time. Omni Search is based on the foundations of

the Knowledge Workbench and can be accessed from within LawMaster by selecting Ctrl+F or clicking on Search LawMaster button in the Menu Bar.

Searching Across All Categories

A search string of at least 3 characters including a series of words or phrases can be entered and on selecting Enter a search across all categories listed below is initiated. The user will be presented with up to 5 records for each category where a result is found. Further records can be viewed for each category by selecting View All Results. Selecting a search record will open the record in the enquiry screen for all categories except matter which will open the matter.

Matter Number Search

A user can open a matter directly from Omni Search by entering a number and selecting enter in the Omni Search field.

Prefix Searching

A search can be limited to a specific category by entering a prefix before the search term including:

- ❖ Matters m-
- ❖ Folios f-
- ❖ Entities c-
- ❖ Document Templates t-
- ❖ Deeds d-
- ❖ Library Catalogue l-
- ❖ Programs p-

Where a result is returned for the specified category up to 30 records are displayed to the user with the option to View All Results if required.

Omni Search Status is displayed to the right of the input field and in the LawMaster Status Bar. The user can select the Cancel Search button if results have not been returned.

Omni Search initiated on selecting Enter

59615

Omni Search is initiated by the user selecting Enter following the input of search criteria.

If the user makes a change to search criteria, except for Matter Number search, whilst Omni Search is in progress and re-selects Enter the existing search is cancelled and a new one commenced. If user makes a change to search criteria by entering matter number, initial Search is cancelled, and message "Search Finished" displayed.

When users enter a number and select enter in the Omni Search field, a matter number search is triggered. If a matter is found, it will be opened immediately. If a matter is not found or is unavailable due to security, a message will be displayed.

When users enter an alphanumeric term or phrase in the Omni Search field, the Matter category will search both the matter number and matter description for open matters.

When users enter a prefix of "m-" or "M-" followed by a number or alphanumeric term in the Omni Search field, they will be able to search on both the matter number and matter description for open matters, and only the Matter category will be displayed.

Where users double click on a matter search result, the matter will open. Where users select "View all Matter Results" the Matter Search screen will open with all matters in the search displayed. If the Matter Search window has custom sorting, this will override the default order in Omni Search. Users need to clear sorting to revert to search result order.

Omni Search on Entities

When users enter a number OR alphanumeric term in the Omni Search field, the Entity category will search on both the entity id and entity name.

When users enter a prefix of "c-" or "C-" followed by a number or alphanumeric term in the Omni Search field, they will be able to search on both the entity id and entity name, and only the Entity category will be displayed.

Where users double click on a search result, the Entity Enquiry screen will open with that entity displayed. Where users select "View all Entity Results" the Entity Enquiry screen will open with all Entities returned in the search displayed. If Entity Enquiry window has custom sorting, this will override the default order in Omni Search. Users need to clear sorting to revert to search result order.

Omni Search on Folios

When users enter a number OR alphanumeric term in the Omni Search field, the Folio category will search on the folio number, precis and folio contents where Elasticsearch is enabled, and the folio has not been skipped during the indexing process.

When users enter a prefix of "f-" or "F-" followed by a number or alphanumeric term in the Omni Search field, they will be able to search on the folio number, precis and folio contents where Elasticsearch is enabled, and the folio has not been skipped during the indexing process with only the Folio category displayed.

Folios will only be displayed if user has access to Folios Enquiry window from Security and has the correct Security Class for the folio records returned.

Omni Search on Library Catalogue

59063

When users enter a number OR alphanumeric term in the Omni Search field, the Library category will search on Library Catalogue Title Description field.

When users enter a prefix of "I-" or "L-" followed by a number or alphanumeric term in the Omni Search field, they will be able to search on the title description, and only the Library category will be displayed.

Where users double click on a search result, the Library Catalogue screen will open with that Library item displayed at the top of the grid. Where users select "View all Library Results" the Library Catalogue screen will open with all Library Items returned in the search displayed. If Library Catalogue window has custom sorting, this will override the default order in Omni Search. Users need to clear sorting to revert to search result order.

Omni Search on Document Templates

59064

When users enter a number OR alphanumeric term in the Omni Search field, the Templates category will search on Document Templates Description field.

When users enter a prefix of "t-" or "T-" followed by a number or alphanumeric term in the Omni Search field, they will be able to search on the template description, and only the Templates category will be displayed.

Where users double click on a search result, the Document Templates screen will open with that template displayed in the grid. Where users select "View all Template Results" the Document Templates screen will open with all templates returned in the search displayed. If Document Templates window has custom sorting, this will override the default order in Omni Search. Users need to clear sorting to revert to search result order.

Omni Search on Deeds

59065

When users enter a number OR alphanumeric term in the Omni Search field, the Deeds category will search on Document Details field.

When users enter a prefix of "d-" or "D-" followed by a number or alphanumeric term in the Omni Search field, they will be able to search on the document details, and only the Deeds category will be displayed.

Where users double click on a search result, the Deeds screen will open with that Deed displayed in the grid. Where users select "View all Deed Results" the Deeds screen will open with all deeds returned in the search displayed. If Deeds window has custom

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sorting, this will override the default order in Omni Search. Users need to clear sorting to revert to search result order.

Omni Search on Programs

59066

When users enter a number OR alphanumeric term in the Omni Search field, the Program category will search on the Program Path.

When users enter a prefix of "p-" or "P-" followed by a number or alphanumeric term in the Omni Search field, they will be able to search on the Program Path, and only the Program category will be displayed.

Where users double click on a search result, the Program will open or run. Where users select "View all Program Results" the Find Program grid will open with all Programs returned in the search displayed. If Find Program window has custom sorting, this will override the default order in Omni Search. Users need to clear sorting to revert to search result order.

Omni Search Results restricted by Program Availability of the User

59361

Omni Search category results without a prefix will be limited by program access of the logged in user, eg for Matter category, user must have access to Matter Search form from Menubar → Enquiries or Main Menu → Client & Matter → Enquiry. All users can access Programs category but only Programs the user has access to are displayed.

Omni Search using prefix will only return the applicable category results if the user has access to the Program. If the user does not have access to the selected category a message is displayed as follows "[Category Name] Search is not available." E.g., "Matter Search is not available."

If user does not have Program Access to Knowledge Workbench, then a message is displayed "User is not authorised for Knowledge Workbench" on selection of the ellipses in Omni Search.

Cancel and Timeout of Omni Search

59420

Omni Search can be cancelled by either selecting the Cancel Search button to right of the input field or Esc key. A 10-minute timeout for Omni Search has been hardcoded.

On completion of search or the search status changes, if user is on another screen the Omni Search tab takes focus.

Status Bar displays the Omni Search Status as follows:

- ❖ Search Cancelled
- ❖ Search Finished
- ❖ Search Timed Out

❖ Search Stopped by Error e.g., syntax error

Outlook

Improvements to Outlook Integration

56725

To improve integration with LawMaster and Outlook, changes have been made to the following functions:

- ❖ Outlook → Tasks → Context menu → Connect to LawMaster File
 - ❖ Outlook → Tasks → LawMaster Ribbon → Connect to File
 - ❖ Outlook → Appointments → LawMaster Ribbon → Connect to Matter
-

Saving Attachments when saving Multiple Emails Message can be Disabled

57215

The message displayed to the user when dragging multiple emails to LawMaster, "Saving Attachments as separate Folios is not supported if multiple Emails are selected." can now be disabled by selecting the checkbox in the message form.

If selected by user, the setting is saved to the ViewConfig.json file stored in the following location:

C:\Users\[username]\AppData\Roaming\LawMaster\PracticeManagement\ViewConfig.json

User can choose to Sync Bring-ups/Tasks using Bring-ups Timer

57488

An additional option of 'Sync using Timer' has been made available for the synchronisation of added or updated Bring-ups / Tasks from Security → Maintain User Security → Select Resource → Outlook Synchronisation → Tasks, to stop the real time push of newly created or updated Bring-ups.

Where a user has this selection enabled, Bring-ups will be synced to Outlook tasks in line with the time set in Outlook Integration → Bring-ups Synchronisation Timer. If the Bring-ups Sync Timer is set to 0 all bring-ups syncing is disabled.

If a conflict is received during the sync process, the item in conflict is skipped and any remaining items completed.

The option Action LawMaster Bring-up from Outlook Task from Outlook Tasks context menu will be pushed to LawMaster at the next sync whereas Delete LawMaster Bring-up is immediate.

The message displayed to user if VSTOR is not installed has been updated as follows:

"The Visual Studio 2010 Tools for Office Runtime (also known as VSTOR) is not installed. Please download and install the latest version from the Microsoft Download Center."

A copy of the VSTOR files have been made available from the LawMaster Client Service Centre ➔ Other Downloads for users upgrading to Cuba.

Payroll

Cessation Type to be recorded

55651

The reason for termination of an employee is required to support STP Phase 2 processing as defined by the Cessation Type Code.

New Cessation Type Codes have been added to parameters in order to record the Cessation Type Code and Description, defined by the ATO as follows:

V	Voluntary Cessation
I	Ill Health
D	Deceased
R	Redundancy
F	Dismissal
C	Contract Cessation
T	Transfer

A new field labelled "Cessation Type" with lookup for Code and Description has been added on Employee Details ➔ More tab. "Terminated Date" has been relabelled "Cessation Date" in both Employee Details and Employee Enquiry grid. "Reason" has been relabelled "Remarks" in both Employee Details and Employee Enquiry grid.

Validation has been added to "Cessation Type" field as follows:

1. "Cessation Type" cannot be blank if a "Cessation Date" is nominated.

Validation has been added to "Cessation Date" field as follows:

1. "Cessation Date" cannot be blank if a "Cessation Type" is selected.
2. "Cessation Date" cannot be greater than 10 years from Today.

3. "Cessation Date" cannot be earlier than Date Hired

A "Cessation Type" column has also been added to STP Reconciliation Report Grid and "Termination Date" has been changed to "Cessation Date".

Duplicate Run Number Issue in Payroll

55970

Corrected an issue where the Last EFT Number value was used to generate the run number in Payroll and in some instances caused a duplicate run number to be allocated across Bank Accounts. Payroll run numbers are now generated using the ZZ-RN Parameter to ensure no duplication can occur.

Tax Scales for Tax Treatment Code Generation

56440

On upgrade, the following Payroll Tax Scales parameters will be updated to 'not visible' as they are no longer relevant:

1H, 1HS, 2H, 2HS, 7, 7H, 7HS, 7S.

A new Payroll Tax Scale Parameter will be added as follows:

Par_Code = 3S

Par_Description = STSL plus Non-resident

Par_visible = Y

Employment Basis

56987

A new field has been added to the "Payroll Classification Code" parameter (Parameters ► Payroll) labelled "Employment Basis Code" that has the following options for selection:

- ❖ Full time
- ❖ Part time
- ❖ Casual
- ❖ Death Beneficiary

The Employment Basis Code field is mandatory on Add/Modify of the Payroll Classification Code parameter.

On upgrade to Cuba, existing Payroll Classification Code parameters will be mapped by first character of the Description field as follows:

- ❖ F* = Full time
- ❖ P* = Part time
- ❖ C* = Casual

-
- ❖ T* = blank
 - ❖ Other = blank

Following upgrade to Cuba, system administrators should review the Payroll Classification Codes to ensure the Employment Basis Code has been mapped correctly.

New Field on STP Report Status to display Pay Event Service used

56993

A new column has been added to the STP Report module (Main Menu ➔ Payroll and Personnel ➔ Single Touch Payroll STP Report Status) called 'STP Service' which lists the STP Pay Event Version used to compile the STP Report at the time it was sent to the ATO.

On upgrade, all existing STP Report records will include the STP Service of 'Payroll Event 2018". Once STP Phase 2 has been enabled in the next release instructions will be provided on how to switch to the new service.

Validation on Medicare Code

57069

Validation has been added to Employee ➔ Pay Details tab as follows: Medicare Levy Reduction cannot be claimed against Tax Scale commencing with 1, 3 or 4.

Tax Offset reporting to support STP Phase 2

57073

On upgrade, Employee details ➔ Pay Details tab displays one field for Tax Offset which is the sum of values previously stored in the Zone Allowance and Family Tax Benefit field. Family Tax Benefit / Dependent Allowance is no longer displayed to user. All changes to these fields are captured in the audit trail for employee.

A Tax Offset amount greater than zero can only be claimed where Tax Scale 2, 2S, 5 or 6 are selected. On selection of OK in the Employee Details ➔ Pay Details tab, validation has been added to the Tax Offset field as follows:

1. If Tax Offset > 0 then Tax Scale must equal 2, 2s, 5 or 6. If that is not the case, a validation message is displayed as follows "Tax Offset amount can only be applied where Tax Free Threshold claimed."
2. If Tax Offset < 0, a validation message is displayed as follows "Must be greater than or equal 0."

Test Tax Calculations module (Main Menu ➔ Payroll and Personnel ➔ Administration) no longer provides for Dependent Allowance Input or Output.

"Family Tax Benefit" column has been removed from the Employee Enquiry Grid and "Zone Offset" has been renamed "Tax Offset".

Display Pay Period Dates on Review Timesheets grid

57149

Two new columns have been added to Review Timesheets grid (Main Menu ➔ Payroll and Personnel ➔ Payroll Processing ➔ Input and Review Timesheets) as follows:

1. Pay Period From - Displays the Pay From value for each employee's pay record reported.
2. Pay Period To - Displays the Pay To value from each employee's pay record reported.

"Pay Date From" and "Pay Date To" columns have been relabelled "Pay Period From" and "Pay Period To" in Employee ➔ Earnings History Tab and Generate Timesheets Grid.

On Modify Timesheet, "Override Tax" and "Tax" amount fields can now be modified without having to select Modify Header.

Cumulative Earnings Summary Report can be reported for Previous Year

57256

Cumulative Earnings Summary Report (Main Menu ➔ Payroll and Personnel ➔ Reporting) has been updated to allow for user to report for both the current and previous payroll year.

Input Date Fields have been modified:

- ❖ "Month date - From" has been changed to "Pay Date - From"
- ❖ "Month date - To" has been changed to "Pay Date - To"

The following columns have been removed from the Report:

- ❖ "YTD Gross"
- ❖ YTD Tax"
- ❖ YTD Deductions"
- ❖ "YTD Nett"

Duplicate Pay Transactions Generated

57260

Corrected an issue where user was able to trigger two instances of audit payroll process by double clicking on the OK button.

End of Day process now includes Payroll Integrity Check

57300

The Payroll Integrity module "File Check Employee Earnings" for Current Year and Correct Imbalances set to No is now run within the Generate System control Report module.

If any of the comparison columns as noted below are out of balance, the following message will be displayed in the Messages tab:

**** Payroll Transactions and Employee Master Control Table not balanced for Company [Name]"

- ❖ Employee Gross v Earnings Gross
- ❖ Employee Tax v Earnings Tax
- ❖ Employee Deductions v Earnings Deductions

On upgrade previous system control reports will show blank fields for the new columns.

WP Form SYS - Table 2 includes new table fields to report on values as follows:

- ❖ T2_7 - Earnings Gross
- ❖ T2_8 - Earnings Tax
- ❖ T2_9 - Earnings Deductions
- ❖ T2_10 - Earnings Nett

The following columns have been added to the Payroll Tab of the System Control Report:

- ❖ Earnings Gross
- ❖ Earnings Tax
- ❖ Earnings Deductions
- ❖ Earnings Nett

The existing columns have been relabelled:

- ❖ Employee Gross
- ❖ Employee Tax
- ❖ Employee Deductions
- ❖ Employee Nett

Static Field 52 Super Line on WP Form PPA returns error

57310

Corrected an issue where an error was returned when a Static Field contained inside a table returned no data instead of converting to \$0.00.

Payroll Advice WP Form PPA converted to Open XML

57331

The PPA WP Form has been migrated to Open XML standard and from Cuba only .docx file type is supported. If your PPA WP Forms are of the .doc file type, you need to update your PPA WP Forms as follows.

-
1. Change the Form file type to .docx: Main Menu → System Maintenance → Forms → Form Enquiry → Select the form → Context Menu → Modify → Form File Name, select Unlock → Change the document type from .doc to .docx.
 2. Modify the document file type from .doc to .docx and upload the new document to Forms: Main Menu → System Maintenance → Forms → Form Enquiry → Select the form → Context Menu → Modify → Document Upload.

The Print Pay Advices module has been moved to below Audit Payroll Transactions in Main Menu → Payroll and Personnel → Payroll Processing. Some label changes have been made to the module inputs dialog and the module description has been updated as follows:

"This module provides the facility to print pay advices for employees paid by cash, direct bank deposit and/or cheques. The Pay Status of 'Audited Pays' will print pay advices for all employees in the nominated range with an audited pay record that has a Pay Date equal to that nominated. The Pay Status of 'Unaudited Pays' will print pay advices for all employees in the nominated range with unaudited pay records up to and including the nominated Pay Date."

The words "Re-Printed" have been removed from folio precis when Pay Advice folio is created.

STP Module access removed from Main Menu

57348

The following modules have been removed from Payroll → Single Touch Payroll folder:

1. Submit STP Update
2. Submit EOY Finalisation Declaration to the ATO

On upgrade:

1. Users who had access to these modules via Security → Maintain User Security → Programs will no longer have programs selected
2. Programs are no longer available for selection from Security → Maintain User Security → Programs
3. Programs are removed from Favourites if used.

Users can still run these modules from the STP Reconciliation module.

Prevent users from accessing parameters from STP Errors/Warning Tab

57466

Corrected an issue where users that did not have access to the Set Parameters program were able to go to Parameters by double clicking on a parameter error on the Validation Errors Tab of STP Reconciliation.

New field Tax Offset is updated to WP Form PPR

57471

Forms Workbench - WP Form PPR 'Print Employee Details' has been updated as follows:

1. Static Field 12 'Dependence Allowance' has been removed
2. Static Field 64 'Zone Allowance' has been renamed 'Tax Offset'

A new sample WP Form PPR has been added to the Practice Management Sample Forms collection available from the Client Service Centre.

Death Benefit ETP validation to support STP Report Phase 2

57490

Validation has been added to the "Add Employment Termination Pay" window on selection of OK as follows:

Where an ETP Payment Code of D, N, B or T is selected the nominated Employee must have a Cessation Type Code of D.

Deductions reporting in support of STP Phase 2

57528

The list of options available under the 'Deductions Code' field of the Payroll Payment and Deduction Codes parameter (Par_type = 'PC') where the Payroll Code commences with D (Par_Code Like D%) has been expanded to include two additional options:

- ❖ Child Support Garnishee - mapped to par_details_3 = 'G'
- ❖ Child Support Deduction - mapped to par_details_3 = 'D'

On upgrade to Cuba, the existing values where Par_Type = 'PC' and Par_code like D% and par_details_3 = 'G' will be remapped to par_details_3 = 'W'. Users will now have Deductions categorised as 'Workplace Giving' grouped by Deduction Code 'W' rather than 'G'.

Cessation Type to be recorded from Terminate button

57559

A new field labelled 'Cessation Type' with lookup for Code and Description has been added to 'Terminate Employee' accessed from Employee Enquiry ➔ Employee ➔ Details ➔ Terminate button.

Validation has been added to "Cessation Type" field in line with that applied to Modify Employee window as follows:

- ❖ If a "Cessation Date" is nominated a "Cessation Type" must also be selected
- ❖ "Cessation Date" cannot be greater than 10 years from Today.
- ❖ "Cessation Date" cannot be earlier than Date Hired.
- ❖ Invalid Cessation Type cannot be entered.

❖ "Cessation Date" must be recorded if user selects OK otherwise select Cancel.

Where the Transfer button is used to transfer an employee from one company to another, the Cessation Code of T (Transfer) will be used by default.

Include Audit Trail on Update of Payroll Password

58109

Any updates to the Payroll Password can be viewed by selecting View Audit Trail on the Par_Type = 00, Par_Code = PAYROLL parameter or Audit Trail for All Parameters (Menubar → Parameters) where Payroll Password is modified via Amend Password (Main Menu → Payroll and Personnel → Administration).

Records Management

Timeout for Convert to PDF parameter

56425

A new parameter titled Timeout for Convert to PDF via Export has been added to the Records Management → Processing Options Parameter. On upgrade, a default Wait Time of 10 minutes has been set, users can select a timeout range of between 1 and 20 minutes for converting files to PDF before adding as an attachment.

The wait time indicated in the parameter is checked where files are converted to pdf in the following modules:

- ❖ Cabinet Header → Export Folio(s)
- ❖ Cabinet Items → Export/ Print → Export Folios
- ❖ Folio Enquiry → Export / Print → Export Folios

Validation added to maintain Integrity of Cabinet Items

56742

Validation has been included on the Cabinet Items → Add function to ensure the folio record exists at the time of add.

Page Number out of Bounds error on Password Protected PDF

57108

Corrected a "Page Number out of Bounds" error which was reported when exporting a multi-page PDF that has a Permission password. Where the PDF has password protection for open, the file is added as an attachment to combined pdf. Where PDF does not have password protection for open, the file is combined to pdf in full.

LawMaster Display resizes on Publish to PDF

57216

LawMaster now maintains the existing font sizing on selection of Publish to PDF module where Include Page Number option is selected and the user has multiple displays with different scales and layout.

LawMaster supports File Format extension up to 5 characters

57746

LawMaster now accepts the uploading of files with a file format extension up to 5 characters in length.

Skewed Page Numbering when exporting from Cabinets

57756

Corrected a page numbering display issue on export of PDF files that, when originally written, were rotated (or transformed in some manner). This rotation was then falsely applied to the page numbers.

Auto Check-In of MSG Files

58052

On upgrade to Cuba, the Outlook MSG file type will be included in the list of supported files for Auto Check-In on the Records Management ➔ Processing Options parameter.

Where Auto Check-In is ticked, the MSG file is written to the CheckOut Collection on Edit.

The Auto Check-In program periodically scans the CheckOut Collection and tries to take exclusive access of the files mentioned in the collection. If LawMaster can exclusively access a file, then the program will check-in the file and remove the file name from the Checkout Collection (subject to the wait time nominated on the Parameter).

Manual Check-In and Undo Check Out will also remove the file name from the CheckOut Collection.

If the user closes LawMaster before closing any opened MSG files, Auto Check-In will not occur.

New Shortcut for Forward Email and Fax Unpaid Item

59547

From Cuba onwards, the global shortcut for Omni Search is Ctrl+F.

This has required a reassignment of the existing Ctrl+F shortcut key as follows:

- ❖ New shortcut Ctrl+Shift+F has been assigned to Forward from the Folios context menu.
- ❖ New shortcut Ctrl+Shift+F has been assigned to Fax from the Unpaid Items context menu.

The LawMaster User Interface has been redesigned to provide a fresher more modern look and feel. Changes made to the User Interface include:

1. Convert Menu Bar options to a ribbon style menu which incorporate the Lawyer's Toolbar buttons into the new ribbon menu under an individual heading. The Lawyer's Toolbar ribbon page is the default ribbon upon app launch. The user can switch between the collapsed Simplified or expanded Classic state or Minimize the Ribbon if required.
2. Convert Main Menu to Accordion Control with Hamburger button to expand or collapse the menu. Embedded search panel allows the user to quickly locate a required menu option.
3. Alerts are displayed to the left of the screen within the Main Menu. Badge displays the number of alerts that have new items to be addressed.
4. The Matter UI has been enhanced with the following improvements:
 - a. Matter Menu and Matter Toolbar have been incorporated in one menu to the left of the Lawyer's Workbench area with a Hamburger button to expand or collapse the menu.
 - b. The File Note area has been increased and now has the ability to change the text size for easier reading using Zoom In and Zoom Out icons.
 - c. Time Details, Disbursement Details and Action Event are now able to be collapsed or expanded.
 - d. Matter Summary is now included as a Collapsible Side Bar that is maintained on the right-hand side of the Matter window for each tab opened within LawMaster.
 - e. Users can pin Matter Summary in Expanded or Collapsed mode and setting is retained in the user's config file.
 - f. Matter in focus is highlighted in orange.
 - g. All Matter and Program Tabs can now be closed using the X to the right of the tab.

On upgrade to Cuba, the default User Interface View settings are:

1. Time Details expanded
2. Disbursement Details expanded
3. Action Event collapsed
4. Matter Summary panel expanded/pinned
5. Menu Bar Ribbon collapsed in Simplified state.

When the user expands or collapses these views, the settings are saved to the user's ViewConfig.json file

C:\Users\[username]\AppData\Roaming\LawMaster\PracticeManagement\ViewCon
fig.json.

Increased Security Measures

45793

As a part of our continuous improvements, we have added a range of additional security measures into the internal processing of LawMaster and the connections between different LawMaster components and web applications. This serves to increase communication integrity, improving resistance against any accidental or malicious interference.

Modal Message forms displayed on the current Monitor

48261

LawMaster Message / Dialogue forms are now explicitly displayed on the current monitor in the front and center of the display if they are Modal.

Limit added for Session Token used in Client Portal

55751

The Session Token used in the Client Portal for downloading folios has been limited to remain valid for 5 minutes.

PROADM User Management

55778

PROADM user account can be modified only if user is logged in as the PROADM user.

PracticeManagement Client supports 64 bit

56906

LawMaster PracticeManagement Client exe will run in 64 bit mode if Windows version is 64 bit.

LawMaster's Web Browser control has been upgraded to Microsoft Edge WebView2

57680

Microsoft Edge WebView2 Runtime v93.0.961.44 or later is now a prerequisite for the installation of PracticeManagement Client. If this requirement is not met a message will be displayed to the user on installation of PracticeManagement Client prompting the user to install WebView2 Runtime before proceeding with the upgrade.

WebView2 is used in the following areas of LawMaster:

- ❖ Preview Pane and Folio Preview
- ❖ GlobalX Searching
- ❖ PowerBI and User Defined Queries run from within LawMaster.
- ❖ Knowledge Workbench - Web search

WebView2 is used to preview Word and Excel files when the Folio Grid Menu option "Turn Off Express Viewer for Word and Excel" is selected. Given the default behaviour

of WebView2 is to download files for viewing we recommend users only use this option if the DevExpress Viewer does not work.

Note for System Admins: if automatically installing the Practice Management Client via Microsoft Intune or Powershell, the Microsoft Edge WebView2 Runtime prerequisite will not be installed by the msi.

Blacklist of File Types for Upload

57748

A blacklist of file types has been introduced to restrict the upload of potentially malicious files to LawMaster. If the user attempts to upload a blacklisted file type an error message will be displayed indicating the file type is potentially harmful and has been blocked.

DevExpress Upgrade

57780

DevExpress has been upgraded to the latest version 21.1.6

Single Sign On via Azure Active Directory Authentication

58043

Single Sign On (SSO) can be accomplished through the use of Azure Active Directory authentication. To enable this, your Azure administrator must register your LawMaster installation and provide the Redirect URL, Application (Client) ID and Directory (Tenant) ID.

The Authentication Options Parameter (Set Parameters ➔ Miscellaneous ➔ Authentication Options) has been extended to allow users to select Azure SSO as an option and record the following:

1. Redirect URL for sending the authentication request
2. Application (Client) ID
3. Directory (Tenant) ID

Once the Authentication Options parameter has been configured, individual users must be enabled by ticking the Auto Login option in the Security ➔ Maintain User Security ➔ User Settings area, then adding their Microsoft Email address into the User Name field. When logging into LawMaster, the user will be prompted to select which Microsoft Account to use and will be prompted to provide their Microsoft Account password if they have not recently done so.

Access via this option will respect all appropriate rules for Microsoft Authentication such as multi-factor authentication (MFA), password complexity, authentication timeouts and account locking. This supersedes normal authentication rules employed by LawMaster.

Folio Viewer Registry Settings Deprecated

58466

With the upgrade to WebView2 in the Cuba release the folio viewer registry settings are no longer required. The user will no longer be prompted to update folio viewer registry settings on login where the registry does not have specific keys and values.

Deferred loading of Matters and Programs

58689

Restored matters and Favourites set to auto run now use deferred loading on application start-up resulting in improved loading speed and reduced memory usage compared to previous versions of LawMaster.

As a result of the deferred loading, events such as the Matter Alert popup will not appear until the user selects the Matter tab.

Apply JaroWinkler string metric per word in Program Title

58831

The Find Program query, accessed via Omni Search or Knowledge WorkBench, now uses JaroWinkler string metric on a per word basis for ZPrograms prg_title column, returning equivalent results to previous versions for exact matches and better results (more relevant) for inexact matches.

GUI Parameter to Revert back to pre-Cuba Interface

58881

A new "Graphical User Interface" Parameter has been made available to allow the System Administrator to roll back to the pre-Cuba interface for individual users. (Parameters ➔ Set Parameters ➔ Miscellaneous)

If GUI Parameter has "Classic Interface" ticked for a nominated Resource, on login the user will be displayed the original LawMaster interface (without additional features and functionality).

If GUI Parameter has "Classic Interface" unticked for a selected Resource or there is no GUI Parameter record for a selected Resource, the new LawMaster interface will be displayed.

On upgrade to Cuba, the GUI Parameter will be disabled, and the new interface will be loaded for all users.

Config file for Menu Bar Ribbon and Matter UI Settings

59030

Matter Workbench Time Details, Disbursement Details and Action Event, as well as Matter Summary and Menu Bar Ribbon can be set to expanded or collapsed state by the user.

When the user expands or collapses these views, the settings are saved to the user's ViewConfig.json file located at

C:\Users\[username]\AppData\Roaming\LawMaster\PracticeManagement\ViewConfig.json.

On upgrade to Cuba, the default settings are:

1. Time Details expanded
2. Disbursement Details expanded
3. Action Event collapsed
4. Summary panel expanded/pinned
5. Menu Bar Ribbon collapsed

Program and Open Matter Details displayed in Windows List 59056

The Windows option available from the Menu Bar displays a list of open Programs, Matters and Requests with the Tab in focus ticked. Matter details include the Work Type, Matter Number and Matter Description are displayed in the list. The user can move between tabs by selecting a Matter or Program from the Windows list. 59982

The ViewConfig.json file stores matter details to ensure the data is available on Restore or Auto Run of Favourites.

On upgrade to Cuba, matter details will not be available for the initial Windows list until the user selects and loads each matter.

Following the upgrade to Cuba, disabling Tabbed Mode will no longer be available and the option under Menubar → Windows → "Enable Tabbed Mode" has been removed where a user has the "Classic Interface" selected in the GUI Parameter.

On closing LawMaster a reconciliation of matters stored in the ViewConfig.json file removes entries that are not Auto Run Favourites or currently opened matters.

Enhance Performance of Bulk Load Time Cost Entries Module 59453

The performance of the Bulk Load Time Cost Entries Module has been improved.

Whitelisted Themes 59014

As a result of the changes to the User Interface the darker themes do not render well. Themes that display correctly on the new UI include:

- ❖ Caramel
- ❖ Money Twins
- ❖ iMaginary
- ❖ Lilian
- ❖ Black
- ❖ Blue
- ❖ Office 2010 Blue

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- ❖ Office 2010 Silver
 - ❖ Office 2007 Blue
 - ❖ Office 2007 Black
 - ❖ Office 2007 Silver
 - ❖ Office 2007 Green
 - ❖ Office 2007 Pink
 - ❖ Seven
 - ❖ Seven Classic
 - ❖ McSkin
 - ❖ Foggy
 - ❖ Springtime
 - ❖ Summer 2008
 - ❖ Valentine
 - ❖ Stardust
 - ❖ Coffee
 - ❖ Glass Oceans
 - ❖ Liquid Sky
 - ❖ London Liquid Sky
 - ❖ The Asphalt World
 - ❖ Xmas 2008 Blue
 - ❖ Metropolis
 - ❖ Whiteprint
 - ❖ Office 2019 White
 - ❖ Office 2019 Dark Gray
 - ❖ Office 2019 Colorful

User Defined Queries

UDQ Passwords assigned after Portugal are unable to be used

57760

Corrected an issue where UDQ Passwords assigned after Portugal were unable to be used.

A Stored Procedure can be applied to a database running Portugal R2 that will copy the password (qp_password) on an existing UDQ to another nominated UDQ that can be executed as a UDQ.

Auto login rules for Power BI Reports or Dashboards apply where user is Signed into Power BI via LawMaster User Defined Query

If user selects Sign Out of Power BI from User Defined Query, then on selection of Power BI Report or Dashboard user is displayed the Sign In screen to select an account. Power BI Sign Out Flag will be stored in the existing ViewConfig.json file. Power BI Sign Out Flag is only updated from the UDQ - Sign Out option.

Workflow Development

Workflow Performance Improvements

57402

Workflow performance has been finetuned with the implementation of indexes, more efficient queries and caching of data for fast lookup.

Testing

We recommend you undertake testing of the release in your training database before installing to Production. We suggest you adopt, as a minimum, the following testing protocol:

- ❖ Review the release notes and identify the items that may have an impact on your business processes.
- ❖ If you are unsure about any aspect of the release, contact Help Desk for clarification.
- ❖ Download the release and install into the training database.
- ❖ Test the requests that may have an impact on your business processes and satisfy yourself they do not have any adverse impact on your business processes.
- ❖ Inform your uses of any changes.
- ❖ Install the release to your Production Database.

Version Control

Version No.	Date of Release	Summary of Changes
10.15.186	12/04/2022	Beta Test Version
10.15.197	11/05/2022	Published Version
10.15.198	01/06/2022	Web Admin Update DEV-2173
