

This document details the system requirements and resolved issues included in Lawtrac™ 4.0.5.

1 Installation Requirements

Before you begin to install Lawtrac 4.0.5, ensure that your system meets the requirements. For a full list of requirements, refer to the Installation Requirements in the *Lawtrac Installation Guide*.

2 Changes or Enhancements

The following items are changes or enhancements built into Lawtrac 4.0.5:

Lawtrac SAML

Issue: Users can log in through the IdP and click on a link to be directed to Lawtrac without having to log in again.

Tracking code: LTCOL-3196

Issue: If a user's session expires, they are returned to the page they left once they are re-authenticated.

Tracking code: LTCOL-3205

Issue: Mitratesch's SSO follows SAML 2.0 standards and can handle authentication requests originating from Lawtrac SP or an IdP. Lawtrac performs token validation and includes a timestamp.

Tracking code: LTCOL-3209

Issue: Lawtrac supports a variety of SAML 2.0-compatible providers.

Tracking code: LTCOL-3215

Issue: TeamConnect branding was removed from the SAML service.

Tracking code: LTCOL-3218

Issue: The SSO service provides error information in the log file for troubleshooting, and does not provide detailed messages to users that an attacker could exploit.

Tracking code: LTCOL-3224

Issue: Separate and unique encryption keys are provided to each client.

Tracking code: LTCOL-3230

Issue: SAMI-SSO has been successfully integrated with Lawtrac.

Tracking code: LTCOL-3632

Issue: User interface allows for administrator log-in using credentials stored in the configuration file, the ability to generate IdP metadata and provide it for configuration files, the ability to define entity ID, base URL, and entity alias, the ability to select a signing and encryption key, and the ability to turn debug logging on or off.

Tracking code: LTCOL-3654

Issue: Documentation for installing and configuring SSO-SAML for Lawtrac is available.

Tracking code: LTCOL-3663

Issue: The SAML-SSO functionality is included for clients on the current 4.0 release of Lawtrac as well as version 4.1 and higher.

Tracking code: LTCOL-3672

Issue: Users navigating directly to Lawtrac are redirected to the IdP to enter their credentials, then automatically sent back to Lawtrac.

Tracking code: LTCOL-3756

Issue: Administrators can log out of the admin interface used to configure SAML.

Tracking code: LTCOL-3878

Issue: The SAML log-in process and administration is compatible with browsers supported for Lawtrac.

Tracking code: LTCOL-3908

Issue: Administrators have the ability to specify their own re-direct URL for user log-out.

Tracking code: LTCOL-3965

Issue: Users can log-in through an alternative URL.

Tracking code: LTCOL-3974

Issue: Administrators can check logs to troubleshoot log-in issues.

Tracking code: LTCOL-3995

Issue: SAML supplies defaults for settings in the configuration file.

Tracking code: LTCOL-4032

Issue: SAML has been tested for compatibility with Lawtrac version 4.1.

Tracking code: LTCOL-4049

Issue: SAML-SSO has been tested for specific client use.

Tracking code: LTCOL-4084

Issue: If a user is timed out of the application for security reasons, the re-direct URL set here does not run. Instead, the user is re-directed to the URL determined in **Application Administration | Data Locations**.

Tracking code: LTCOL-4210

3 Resolved Issues

This section describes the issues that are resolved in the Lawtrac 4.0.5 release. Each resolved issue is documented in the following format:

- A description of the issue
- Internal tracking code
- Salesforce case number, if applicable

Application Administration

Issue: An error occurred when the F_InvoiceDetail table script were run in Database Administration.

Tracking code: LSP-2274

Case number: 2015-0624-137978

Issue: An error occurred when the F_FiscalYears table script were run in Database Administration.

Tracking code: LTCOL-4024

Issue: An error occurred when the CorpInfo, Matters4Captions, and Categories table scripts were run in Database Administration.

Tracking code: LTCOL-4041

Budgets

Issue: The drop-down menu was not available for the Task Budget Type line item.

Tracking code: LSP-1451

Case number: 2015-0506-132594

Issue: Budget line item totals were reflecting double the correct amount.

Tracking code: LSP-3272

Case number: 2015-0925-204928

Documents

Issue: Users were unable to add additional documents after overwriting a previous file.

Tracking code: LSP-1860

Case number: 2015-0526-135391

Invoices

Issue: Comments entered for a rejected invoice were not appearing for law firms' review.

Tracking code: LSP-2895

Case number: 2015-0825-200031

Issue: After an invoice was approved or rejected, the review reminder icon was still displayed.

Tracking code: LTCOL-4020

Issue: Users were able to update the Invoice Approval chain to "None", thus marking the invoice as "Accepted/Resolved".

Tracking code: LTCOL-4028

Issue: A ColdFusion error occurred when viewing an invoice due to STRING vs. LONG comparison.

Tracking code: LTCOL-4058

Matters

Issue: Retiring a checklist question also erased its answers from matter records.

Tracking code: LSP-1256

Case number: 2015-0423-131436

Related to: LTCOL-4072

Issue: When editing the Notice section of a contract matter record, data fields were not populated with existing data.

Tracking code: LSP-1599

Case Number: 2015-0512-133184

Issue: When a user edited Information Text for a matter, the field was populated with incorrect data.

Tracking code: LSP-1692

Case number: 2015-0512-133172

Issue: When creating a matter record, the Matter Short Name field only held 75 characters instead of 250.

Tracking code: LSP-1726

Case number: 2015-0508-132885

Issue: An error occurred when users omitted the Keyword field while creating a matter record in full screen mode.

Tracking code: LSP-1827

Case number: 2015-0518-134776

Issue: The hold email sent to a hold administrator unnecessarily contained a link to confirm acknowledgement.

Tracking code: LSP-1905

Case number: 2015-0526-135411

Issue: Removing a party member from a matter did not remove the matter from their open nor closed matter lists.

Tracking code: LSP-2033

Case number: 2015-0526-135435

Issue: Data from matter records created from key personnel requests were not moved to the matters table after upgrading versions.

Tracking code: LSP-2206

Case number: 2015-0517-134754

Issue: When Matter Sequencing and Auto Sequencing functions were turned on, users could not set the sequence to a number below current setting, even if previous matter number had been deleted and was no longer being used.

Tracking code: LSP-2487

Case number: 2015-0615-137118

Issue: The subject line for emails used to send matter record documents did not contain specific details.

Tracking code: LSP-2535

Case number: 2015-0714-139599

Issue: An error occurred when attempting to view General Listing for a matter with no checklist questions associated.

Tracking code: LSP-2751

Case number: 2015-0813-196282

Issue: Text did not wrap in the Read All Text field.

Tracking code: LSP-2775

Case number: 2015-0814-196567

Issue: Column headings in the **All Matter Records** page did not change to reflect filter settings.

Tracking code: LSP-2847

Case number: 2015-0812-196183

Issue: Client-created Area of Law captions were not reflecting on the Vitals section of a matter record. "Found" functionality was poorly labeled.

Tracking code: LSP-3050

Case number: 2015-0910-202491

Issue: Functionality for adding a \$0 Reserve value was restored.

Tracking code: LSP-3143

Case number: 2015-0924-204722

Issue: Matters in the Not Updated list did not contain links to the records and the earliest date displayed was too far in the past.

Tracking code: LSP-3151

Case number: 2015-0917-203505

Issue: Users could set a Primary Product or a Primary Business Unit for a matter, but not both after an additional category was added to Primary Type or the primary switch was toggled.

Tracking code: LSP-3167

Case number: 2015-0917-203477

Issue: Restored functionality needed for creating and storing a PDF in the Documents list after a Hold is put on a matter record.

Tracking code: LSP-3191

Case number: 2015-0930-205852

Issue: An error occurred when a user attempted to add or modify the Date value field for key dates on a matter record.

Tracking code: LSP-3223

Case number: 2015-1002-206256

Issue: Regular users were not restricted from making changes to the matter security assignment.

Tracking code: LSP-3312

Case number: 2015-1008-207094

Issue: When a vendor staff member was added to a matter record, a confirmation email was not sent.

Tracking code: LTCOL-3861

Issue: The matter amount was not properly aligned while editing the Vitals section of a matter record.

Tracking code: LTCOL-3945

Issue: An error occurred when a user attempted to edit the Priority for a matter record.

Tracking code: LTCOL-3987

Issue: An error occurred when a user provided 250 characters in Matter Short Name field while creating a matter.

Tracking code: LTCOL-4012

Case number: 2015-0508-132885

Issue: When a document file was overwritten on a matter record, the date was not updated.

Tracking code: LTCOL-4097

Issue: Updated state information for key personnel was not updated in the in-house user's account.

Tracking code: LTCOL-4113

Issue: Extra columns were displayed on the **My Matters** page after users selected the "Missing" filter.

Tracking code: LTCOL-4117

Issue: When a user emailed a matter document, the document's universally unique identifier displayed in the subject line instead of the matter number.

Tracking code: LTCOL-4133

Miscellaneous

Issue: Users did not have the ability to re-caption short text fields on a Permission Profile template.

Tracking code: LSP-2298

Case number: 2015-0611-136855

Issue: Personal Event dates were inconsistent and out of order.

Tracking code: LSP-2543

Case number: 2015-0630-138477

Issue: An error occurred when a user attempted to clear or reset the State information for a contract.

Tracking code: LSP-2711

Case number: 2015-0810-195845

Issue: After editing contract information, data was saved but did not display

Tracking code: LSP-2719

Case number: 2015-0810-195842

Issue: Users could not sort matter by name in Quick Find.

Tracking code: LSP-3018

Case number: 2015-0909-202343

Issue: Email notifications for forgotten username or password contained an incorrect link.

Tracking code: LSP-3321

Case number: 2015-1013-208030

People

Issue: Employees released from employment were appearing in the In-House Released list, but were not being released from matter records and no note was displayed.

Tracking code: LSP-1072

Case number: 2015-0410-130077

Issue: The Activity tab was not displaying for the Law Firm staff record.

Tracking code: LSP-1168

Case number: 2015-0413-130267

Issue: Associated party for vendor display was too small; column listed "Party" instead of "Party Type".

Tracking code: LSP-2049

Case number: 2015-0528-135671

Issue: Suggested password displayed in user profile was not based on stated security rules.

Tracking code: LSP-2258

Case number: 2015-0617-137352

Issue: Entity name did not display more than 30 characters.

Tracking code: LSP-2346

Case number: 2015-0619-137569

Issue: Budget, accounting, and AFA permissions and finance/communication options for opposing firms/vendors needed to be removed.

Tracking code: LSP-2503

Case number: 2015-0714-139605

Issue: Sandbox Site did not list all released Key Personnel.

Tracking code: LSP-2511

Case number: 2015-0709-139233

Issue: A truncation error occurred during the upgrade for key personnel names exceeding the character limit.

Tracking code: LSP-2647

Case number: 2015-0804-195126

Issue: Access was not granted to Lawtrac users after the appropriate permission box was checked when adding a key personnel record.

Tracking code: LSP-2663

Case number: 2015-0702-138724

Issue: Upcoming events for key personnel were displaying outside of the current year.

Tracking code: LSP-2671

Case number: 2015-0717-140027

Issue: There was no data field for Country when adding international law firm addresses.

Tracking code: LSP-2679

Case number: 2015-0810-195892

Issue: The display of Key Personnel data was inconsistent and did not always display correct information.

Tracking code: LSP-2703

Case number: 2015-0807-195614

Issue: After editing the Record & Permissions field in a Key Personnel profile, the selected state would not display.

Tracking code: LSP-2855

Case number: 2015-0818-198031

Issue: When adding a key personnel user, there was no field to input cellular phone information.

Tracking code: LSP-2879

Case number: 2015-0826-200321

Issue: Users could not categorize a staff member as opposing without categorizing the entire firm as opposing.

Tracking code: LSP-2976

Case number: 2015-0827-200557

Issue: Character limit for the Legal Department position title was not long enough.

Tracking code: LSP-3066

Case number: 2015-0908-202124

Issue: An error occurred when adding new legal department members to the Lawtrac application.

Tracking code: LSP-3114

Case number: 2015-0917-203592

Issue: Vendor listings in the People module showed incorrect values.

Tracking code: LSP-3207

Case number: 2015-1005-206481

Issue: An error occurred when a user navigated to a vendor's rate card page.

Tracking code: LTCOL-3991

Issue: The tab "Activities" displayed in a vendor's staff record instead of "Activity".

Tracking code: LTCOL-4008

Issue: Country data field did not display when editing a vendor's record.

Tracking code: LTCOL-4016

Reports

Issue: The Matter Record Report under the Report Listing support category displayed database tables instead of matter record counts.

Tracking code: LSP-2442

Case number: 2015-0526-135401

Issue: An error occurred when regular users attempted to open a Business Unit report from Corporate Dashboard.

Tracking code: LSP-2936

Case number: 2015-0826-200216

Issue: The Reserves drop-down for Report Writer did not display the client-created field names.

Tracking code: LSP-3159

Case number: 2015-0924-204764