

This document details the system requirements and resolved issues included in Lawtrac™ 4.0.6.

## 1 Installation Requirements

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Before you begin to install Lawtrac 4.0.6, ensure that your system meets the requirements. For a full list of requirements, refer to the Installation Requirements in the *Lawtrac Installation Guide*.

## 2 Resolved Issues

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This section describes the issues that are resolved in the Lawtrac 4.0.6 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:** When a user was logged out due to inactivity, their profile remained on the Active list and the user license was not freed.

**Tracking code:** LSP-3391

**Case number:** 2015-1009-207333

**Issue:** Codes associated with LEDES Reporting Groups did not display.

**Tracking code:** LSP-3629

**Case number:** 2015-1118-215367

**Issue:** The Categories table in **Database Administration** caused an error and script did not run to completion.

**Tracking code:** LSP-3663

**Case number:** 2015-1124-216498

**Issue:** The Matters table in **Database Administration** caused an error and script did not run to completion.

**Tracking code:** LSP-3655

**Case number:** 2015-1124-216493

**Issue:** The Vendors table in **Database Administration** caused an error and script did not run to completion.

**Tracking code:** LSP-3671

**Case number:** 2015-1124-216506

**Issue:** Unlinked Product category levels generated an error in the Advanced Settings section.

**Tracking code:** LSP-3801

**Case number:** 2015-1209-218639

**Issue:** Matter Product category levels were not displaying appropriately in the Advanced Settings section.

**Tracking code:** LSP-3809

**Case number:** 2015-1204-217973

**Issue:** Checklist questions appeared in alphabetical order rather than the order configured.

**Tracking code:** LSP-3929

**Case number:** 2015-1218-220672

**Issue:** **Database Administration** tables displayed an extra column.

**Tracking code:** LSP-4140

**Issue:** Opening the **Party Types** page generated an error.

**Tracking code:** LSP-4278

**Issue:** When the setting to link the levels was enabled, users could not add new matter department category levels and user interface displayed incorrectly in **Application Administration | Matter Maintenance | Departments: Review/Modify**

**Tracking code:** LSP-4498

**Issue:** **Product: Review/Modify** page did not load properly when there were many Type5 entries with unlinked levels.

**Tracking code:** LSP-4579

**Case number:** 2016-0310-236796

## Budgets

**Issue:** When outside counsel added a line item to a budget, the amount specified was not applied and inconsistent site errors were generated.

**Tracking code:** LSP-4092

**Case number:** 2016-0114-225106

**Issue:** When adding a budget line item, the “What is going to be done?” drop-down only displayed the LEDES codes descriptions, not the codes themselves; only phase-level codes were applied to the budget.

**Tracking code:** LSP-4100

**Case number:** 2016-0114-225126

**Issue:** Default fiscal year was not assigned to budgets.

**Tracking code:** LSP-4476

**Issue:** Outside Counsel could not add a line item to a budget; budget type and frequency did not display.

**Tracking code:** LSP-4496

**Case number:** 2016-0209-230928

**Issue:** Unlinked matter department categories were not filtering correctly and data was not editable in **Application Administration | Matter Maintenance | Departments: Review/Modify.**

**Tracking code:** LSP-4538

**Case number:** 2016-0126-227897

## Documents

**Issue:** An invalid URL was provided for the Visual Studio 2010 Link in the Document Management Installation Program.

**Tracking code:** LSP-2767

**Case number:** 2015-0820-199514

## Financial

**Issue:** If there were no invoices pending first approval, attempting to open the **Approval Schema** page resulted in an error.

**Tracking code:** LSP-3008

**Case number:** 2015-0903-201728

## Firms/Vendors

**Issue:** Restored functionality to change a firm to a vendor, and vice versa.

**Tracking code:** LSP-3512

**Case number:** 2015-1105-212285

**Issue:** Lawtrac firms were able to submit rates for other firms' timekeepers using the data in the Timekeeper ID field.

**Tracking code:** LSP-3540

**Case number:** 2015-1113-213649

**Issue:** No more than five administrators could be set per firm/vendor.

**Tracking code:** LSP-3688

**Case number:** 2015-1202-217302

**Issue:** The Budget Type and Frequency data fields added by the client were not syncing to outside counsel accounts.

**Tracking code:** LSP-4496

**Case number:** 2016-0209-230928

## Invoices

**Issue:** Assigned Type 5 chargebacks were not displaying for LEDES file invoices in **Chargeback Review**.

**Tracking code:** LSP-3696

**Case number:** 2015-1119-215626

**Issue:** A matter record displayed duplicate times on an invoice and in the **Current Totals** section. Invoice amount was doubled under **Original Amounts**, and Type5 displayed multiple times under **Chargeback Review**.

**Tracking code:** LSP-3833

**Case number:** 2015-1214-219645

## Lawtrac Connect

**Issue:** Users upgrading their Lawtrac instances to version 4.0.2 received an error when attempting to upload an email through Lawtrac Connect.

**Tracking code:** LSP-2639

**Case number:** 2015-0803-194793

## Lawtrac Online University

**Issue:** When attempting to change a user's credentials, the page either did not load or took too long to load, which led to an unresponsive browser or a forced timeout.

**Tracking code:** LSP-3026

**Case number:** 2015-0827-200590

## Matters

**Issue:** Folders created based on matter type were not being associated to the new matter's Redwell file.

**Tracking code:** LSP-2222

**Case number:** 2015-0529-135749

**Issue:** When a matter was printed, the report was missing header/footer information and formatting was incorrect.

**Tracking code:** LSP-2466

**Case number:** 2015-0512-133128

**Issue:** Users were not able to edit existing matter text entries.

**Tracking code:** LSP-3704

**Case number:** 2015-1113-213659

**Issue:** Restored functionality to sort **My Matter** screen by matter name.

**Tracking code:** LSP-3745

**Case number:** 2015-1023-209757

**Issue:** Matters picked up information for the current year, rather than the fiscal year.

**Tracking code:** LSP-3897

**Case number:** 2015-1222-221214

**Issue:** When creating a matter, an error occurred when the description exceeded 256 characters.

**Tracking code:** LSP-3921

**Case number:** 2015-1218-220699

**Issue:** Attempting to add a team member to a matter resulted in an error.

**Tracking code:** LSP-3977

**Case number:** 2015-1230-222338

**Issue:** In the **All Matters** page, super users could only view matters to which they were assigned, rather than all matters regardless of assignment.

**Tracking code:** LSP-4193

**Case number:** 2016-0120-226087

**Issue:** Changing the matter list table to display assigned date in ascending order generated an error.

**Tracking code:** LSP-4237

## Miscellaneous

**Issue:** Individuals selected as Invoice Delegates were not notified when an invoice was approved and ready to be printed.

**Tracking code:** LSP-3961

**Case number:** 2015-1113-213665

## People

**Issue:** When searching for a party, the Primary Main Category did not consistently display under the **Classification** column, and at times the non-primary classification displayed instead.

**Tracking code:** LSP-3399

**Case number:** 2015-1009-207347

## Time

**Issue:** When recording new time, the drop-down lists for LEDES and Activities did not display data.

**Tracking code:** LSP-3199

**Case number:** 2015-1006-206649