

This document details the system requirements and resolved issues included in Lawtrac™ 4.0.7.

1 Installation Requirements

Before you begin to install Lawtrac™ 4.0.7, 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

This section describes the issues that are resolved in the Lawtrac™ 4.0.7 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: The “Date Closed” fields for a closed matter record could not be edited.

Tracking code: LSP-2599

Case number: 2015-0721-140316

Issue: An error was generated when users interacted with the text field for **Front Screen Text**.

Tracking code: LSP-2815

Case number: 2015-0819-199208

Issue: Restored functionality for sending messages to specific recipients when action is taken on a matter.

Tracking code: LSP-3000

Case number: 2015-0903-201629

Issue: Category names that were changed in **Application Administration** were not reflected throughout the application.

Tracking code: LSP-4468

Case number: 2016-0204-229892

Issue: Restored functionality for adding new countries to the **Geographic Settings** page.

Tracking code: LSP-4508

Case number: 2016-0204-229892

Issue: Security groups were not disabled by default for matters that contained security restrictions.

Tracking code: LSP-4578

Case number: 2015-1221-220956

Documents

Issue: An error was generated when a user attempted to load a document from a matter record that contained a large amount of documents.

Tracking code: LSP-3993

Issue: The message that was generated for unauthorized file uploads did not contain the matter number or information for the document, and “authorized” was spelled incorrectly.

Tracking code: LSP-4001

Case number: 2015-1211-219121

Issue: Matter security permissions were not applied to documents.

Tracking code: LSP-4567

Case number: 2016-0301-234786

Financial

Issue: Rate card approvers did not receive notification for new pending rate approvals.

Tracking code: LSP-3881

Case number: 2015-1211-219259

Issue: Inaccurate LEDES codes appeared in budget line items when submitted by outside counsel.

Tracking code: LSP-4392

Case number: 2016-0129-228668

Issue: Rate card approval buttons were not displayed for regular users with the appropriate permissions.

Tracking code: LSP-4400

Case number: 2016-0129-228780

Issue: A site error occurred when users attempted to add a line item to a budget with a non-USD currency.

Tracking code: LSP-4598

Case number: 2016-0321-238583

Issue: Users experienced amount discrepancies when a firm's budget currency was not USD.

Tracking code: LSP-4631

Case number: 2016-0330-240506

Invoices

Issue: Restored functionality for searching and sorting recently received invoices.

Tracking code: LSP-4262

Case number: 2015-1023-209810

Issue: Invoices created in Lawtrac did not display information for the individual who billed the time.

Tracking code: LSP-4520

Case number: 2016-0122-226749

Issue: Invoices were still appearing in **Pending Approval** after the user approved them.

Tracking code: LSP-4521

Issue: Invoices did not display line item information for the LEDES file nor Rule detail.

Tracking code: LSP-4524

Case number: 2016-0202-229248

Issue: The "Current Amount" and "Original Amount" invoice data fields overlapped when the invoice was generated into a PDF.

Tracking code: LSP-4531

Case number: 2016-0224-233601

Issue: An error was generated when an individual was released without a selection from the outstanding invoice transfer drop-down list.

Tracking code: LSP-4744

Matters

Issue: Restored functionality to modify the captions for city and county fields.

Tracking code: LSP-2182

Case number: 2015-0604-136224

Issue: Insurance Claim Number and Claim Date fields disappeared after an individual was assigned to the insurance adjuster role.

Tracking code: LSP-4169

Case number: 2016-0107-223361

Issue: Users could only enter up to 30 characters in the UDC-B field when creating a matter, but could enter all 50 characters when editing the field.

Tracking code: LSP-4509

Case number: 2016-0205-230006

Issue: Client-created legal hierarchy category information did not display on the matter record.

Tracking code: LSP-4511

Case number: 2016-0205-230034

Issue: Text field for matter type overlapped with the caption in the Main Classification section of a matter record.

Tracking code: LSP-4537

Case number: 2016-0201-229164

Issue: Users were unable to create pre-approved multi-matter invoices.

Tracking code: LSP-4555

Case number: 2016-0223-233423

Issue: Security groups were not automatically assigned to matters.

Tracking code: LSP-4566

Case number: 2016-0304-235735

Issue: Restored functionality for setting an unlimited amount of days for a Key Date reminder.

Tracking code: LSP-4586

Case number: 2016-0223-233283

Issue: Text strings for the UDCC and UDCD fields were not found when conducting a super search.

Tracking code: LSP-4588

Case number: 2016-0304-235625

Issue: Users could assign matter types that were restricted for the selected matter number prefix when creating a matter.

Tracking code: LSP-4597

Case number: 2016-0318-238291

Issue: Linked record relationships did not show up on the matter record.

Tracking code: LSP-4604

Case number: 2016-0219-232746

Issue: Users were released from all matter assignments instead of the individual matter record.

Tracking code: LSP-4762

Case number: 2016-0426-246307

Issue: An inaccurate message displayed on the GC Dashboard.

Tracking code: LSP-4840

Case number: 2016-0503-247909

Miscellaneous

Issue: Users experience degraded performance when navigating from a matter's supporting page to the main matter screen.

Tracking code: LSP-3255

Case number: 2015-1009-207286

Issue: Dates shown on the Personal Events calendar were out of order and did not consistently fall within the next 30 days.

Tracking code: LSP-2543

Case number: 2015-0630-138477

Issue: Closed records were not designated with red font on the Linked Records list.

Tracking code: LSP-4519

Case number: 2016-0204-229894

Reports

Issue: Restored ability to edit saved criteria values used for running ad hoc reports.

Tracking code: LSP-2727, LSP-3183, LSP-4562

Case number: 2015-0730-141228

Issue: Corporate Dashboard reports filtered by the Business Unit Hierarchy sidebar option generated an error for regular users.

Tracking code: LSP-2936

Case number: 2015-0826-200216

Issue: Ad hoc report templates created prior to Lawtrac version 4.0 did not display the correct criteria drop-down lists due to missing files.

Tracking code: LSP-4286

Case number: 2016-0122-226896

Issue: Radio buttons were not displayed for outputting a standard report to Excel or PDF format.

Tracking code: LSP-4634

Case number: 2016-0323-239282

Issue: Reports did not return a complete list of invoices if there are more than three outside counsel with similar names.

Tracking code: LSP-4648

Case number: 2016-0330-240264