

Lawtrac 4.2.1 Release Notes

Document Release: 8/4/2017

This document details the system requirements and resolved issues included in Lawtrac™ 4.2.1.

1 Installation Requirements

Before you begin to install Lawtrac™ 4.2.1, ensure that your system meets the full Installation Requirements found in the *Lawtrac Installation Guide*.

2 Upgrade Considerations

Important: Due to the addition of a second currency column in Lawtrac 4.1+, users upgrading from previous versions may encounter errors on invoices with multiple currencies. As such, users must run the validation script **40to41validation_script.sql** found in the Validation folder of the 4.2.1 upgrade package prior to upgrade. This script will check your instance to identify any outlier invoices that may be affected. If no invoices are found, proceed through the upgrade as usual. If the script does identify potentially problematic invoices, it is recommended that these invoices are examined prior to the upgrade. Please contact support@mitratech.com for additional information regarding this upgrade if necessary.

3 Known Issues

This section describes the known issues and limitations in the Lawtrac™ 4.2.1 release. Each issue is documented in the following format:

- A description of the issue
- Internal tracking code
- Workaround or additional detail if available

Issue: Clients who upgrade from Lawtrac 4.0 to 4.1+ are running into discrepancies with invoice totals when converting a foreign currency to a base currency (TypeCurrency). Specifically, the TypeCurrency is equaling the original foreign currency even if the invoice amounts were previously converted to the base currency. This results in an additional conversion that yields an incorrect amount for the invoice total.

Tracking code: LSP-10760

Workaround: Clients upgrading from a version prior to 4.1 must run a validation script prior to upgrade to avoid this issue. The script is designed to identify invoices that might cause this issue so clients can make necessary adjustments before performing the upgrade. For more detail, please see the **Installation Requirements** section of the Lawtrac 4.2.1 Release Notes.

4 Changes and Enhancements

This section describes the changes and feature enhancements in the Lawtrac™ 4.2.1 release. Each issue is documented in the following format:

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

Enhancement: A new Client ID field was added to the Application & Database tab.

Tracking code: LSP-8688

Case Number: 2017-0217-344888

Additional Detail: An alphanumeric *Client ID* (Salesforce ClientID) field was added to the *Application Administration > Application & Database > Set Serial Number* page in the Lawtrac Application. Please see the *Set Serial Number* page in the Lawtrac Help for further detail.

5 Resolved Issues

This section describes the issues that are resolved in the Lawtrac™ 4.1.1 release. Each resolved issue is documented in the following format:

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

Issue: Date Opened, Date Closed, and Last Update data did not appear when Super Search feature was used.

Tracking code: LSP-4990

Case Number: 2016-0523-251340

Issue: The upgrade scripts `_OnRequestEnd`, `_ADHOC_Design`, and `_ADHOC_Templates` were missing tables.

Tracking code: LSP-5555

Case Number: 2016-0715-261813

Issue: Blank page displayed when user navigated to People > Entities > List Retired then navigated through the pages using the pagination.

Tracking code: LSP-5651

Case Number: 2016-0624-258503

Issue: Report Writer UDC1-1 fields still had a drop-down menu when they are supposed to be free- form typing fields.

Tracking code: LSP-6715

Case Number: 2016-0921-273962

Issue: Error message appeared when user tried to delete a matter.

Tracking code: LSP-8296

Case Number: 2017-0116-338477

Issue: Error message appeared when user added a new invoice summary comment that included a % symbol.

Tracking code: LSP-9033

Case Number: 2017-0320-350804

Issue: A Lawtrac-generated file overwrites a previously uploaded PDF when the printable feature is enabled.

Tracking code: LSP-9614

Case Number: 2017-0523-373826

Issue: Error occurred in Quick Tab Preview rather than showing the HTML formatted report.

Tracking code: LSP-9648

Case Number: 2017-0327-352272

Issue: Password Expiration date was not enforced.

Tracking code: LSP-4540

Case Number: 2016-0226-234124

Issue: Error thrown when attempting to load Matter Spend By LEDES Code report.

Tracking code: LSP-4754

Case Number: 2016-0420-245126

Issue: Outside Counsel could not easily find the comments for why invoices were rejected.

Tracking code: LSP-6897

Case Number: 2016-1027-281621

Issue: Error thrown when adding fractional/decimal amounts (e.g., 1.10) in the Cost Ea. field.

Tracking code: LSP-9072

Case Number: 2017-0324-351876

Issue: PDF Printable versions of Invoice did not display the State field.

Tracking code: LSP-9164

Case Number: 2017-0406-364208

Issue: Page numbers did not have text wrapping on the Firms/Vendors screen.

Tracking code: LSP-9496

Case Number: 2017-0504-369965

Issue: Full list of Timekeepers did not populate upon loading Manage Timekeepers page.

Tracking code: LSP-9665

Case Number: 2017-0525-374600

Issue: Placing an End Date on a Matter Hold instantly removed the hold from the Matter, even if the End Date was set in the future.

Tracking code: LSP-2615

Issue: Documents and text records were able to be deleted from a Matter when it was on hold.

Tracking code: LSP-5203

Case Number: 2016-0624-258535

Issue: The All Matter Records page was distorted because the page pagination did not wrap to fit the screen.

Tracking code: LSP-5930

Case Number: 2016-0805-265428

Issue: The respective information was not documented on a matter's Transaction Tab or Transaction Report after a matter was closed.

Tracking code: LSP-6001

Case Number: 2016-0815-267078

Issue: The Standard Spend Report was displaying incorrect amounts and included rejected invoices.

Tracking code: LSP-8351

Case Number: 2016-1214-293738

Issue: Incorrect notification text was displaying in the notification email sent to newly appointed Hold Administrators.

Tracking code: LSP-9790

Issue: Hold Administrator fields did not populate automatically when user tried to Set Header and Footer in the Message Library tab.

Tracking code: LSP-9823

Issue: All non-administrator users were able to see Events for all matters regardless of their assignment.

Tracking code: LSP-9921

Case Number: 2017-0627-381583

Issue: Error thrown in application when report writer user updated information in the Reporting > Report Writer > Display Info page.

Tracking code: LSP-10008

Issue: Limited search results were returned when hold administrator used the Look Up Add To Hold option.

Tracking code: LSP-10032

Case Number: 2017-0705-383603

Issue: Error displayed in both Quick Preview and Full Report tabs after user refreshed and adjusted the details on the Report Writer page.

Tracking code: LSP-10298

Issue: Users can customize email subject line for Legal Hold Notice emails.

Tracking code: LSP-8841

Issue: Hold messages were sent immediately upon being added under Hold Notices rather than upon scheduled time.

Tracking code: LSP-9807

Issue: Removing a matter from a hold also removed that matter from the Transactions table.

Tracking code: LSP-9815

Issue: Verification link for Hold Message emails required more visible placement.

Tracking code: LSP-9833