

## Suite 8.11.0 SP10

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### Summary

Date Released

08/19/2019

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### Enhancements

#### General

- System Administrator can now specify a sub-tab to be placed on a New Matter Wizard so that users can fully define a new matter. When entering data on the new matter, you must enter a main tab record to which the sub-tab record belongs.

**Tracking code:** IDEC-I-155, STE-18146, STE-18611, STE-17939

- Users are now able to search for fields across the modules.

For example, previously, if a user searched for costs information for a matter, the user could not see certain invoice data, such as the exported date, and if running an invoice search, the user could not see all of the matter data.

Now, if a user wants to search matter data and include invoice information, the user can include certain invoice fields.

The following fields are now searchable across modules:

- **Invoices**
  - Matter Type
  - Player Type
  - Player Name
  - Timekeeper ID
- **People**
  - Vendor
  - Invoice #
  - Date
  - Status
  - Total Billed



- Adjusted Base
- **Entities**
  - Vendor
  - Invoice #
  - Date
  - Status
  - Total Billed
  - Adjusted Base
- **Court**
  - Vendor
  - Invoice #
  - Date
  - Status
  - Total Billed
  - Adjusted Base
- **Calendar**
  - Start Date
  - End Date
  - Matter Number
  - Matter Type
  - Matter Name
  - Matter Status
- **Matter**
  - Cost > Exported Date

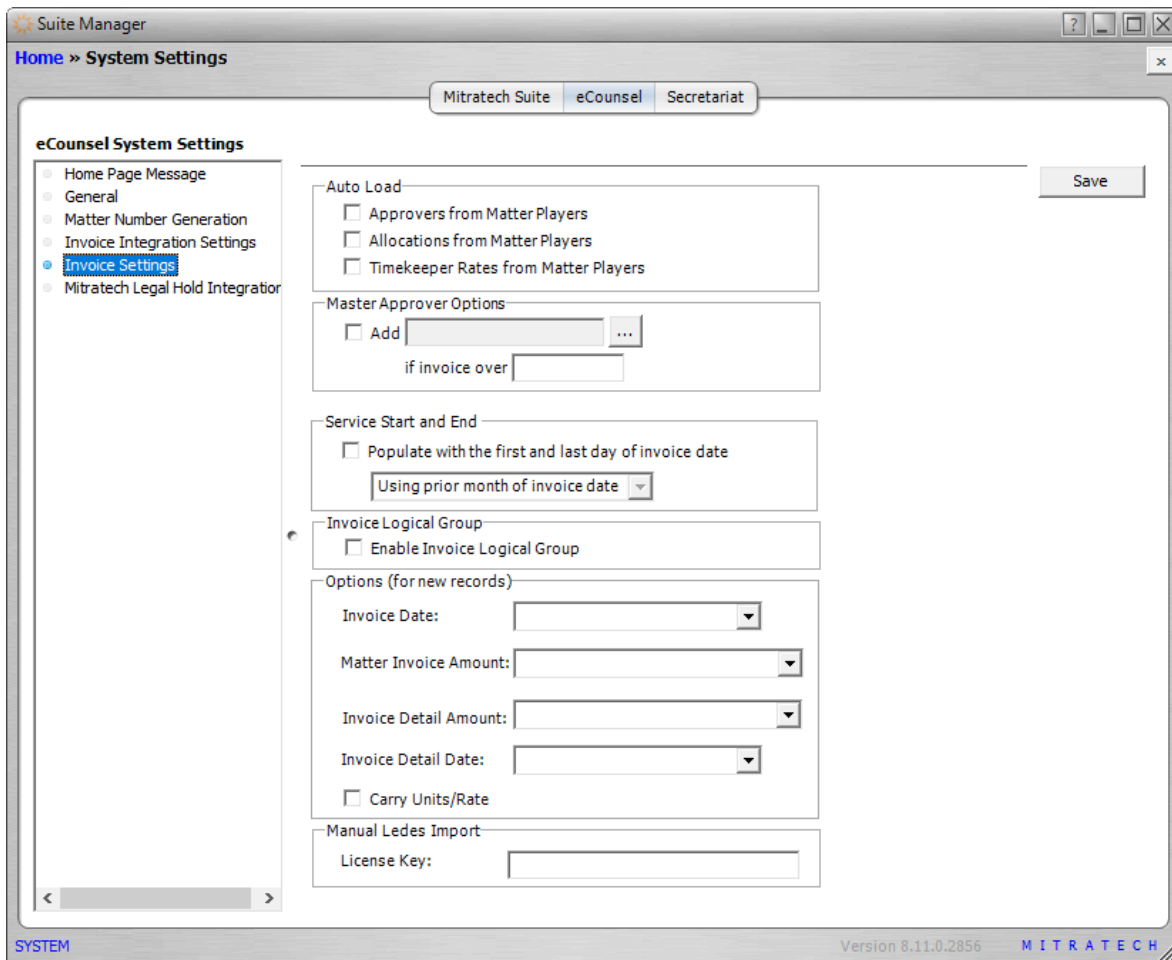
**Tracking code:** IDEC-I-169, STE-17952, STE-18495, STE-18871

## Invoices

- Originally, if timekeepers were added to a matter, the rate was automatically loaded. However, this rate would not be updated and when new rates were loaded to the system, the invoices would fail because the rates were out of sync. You can now disable the auto load rate on the eCounsel **Invoice Settings** tab in Suite Manager.

**Tracking code:** STE-18162





## Smart Invoice with Corridor Integration

- In Corridor, vendors can now select eCounsel matter numbers from a list of matters that list the vendor as a player when they are manually submitting an invoice. Note to eCounsel users: Vendors are now able to see eCounsel matter names and numbers that list the vendor as a player. Matters only sync for vendors if the client installs and runs the "Corridor Vendor Matters" task.

**Tracking code:** STE-17948, IDEC-I-172

## Issue Resolutions

In addition to a number of security updates, this service pack includes the following issue resolutions.

## Suite

In addition to a number of security updates, this service pack includes the following issue resolutions.



- The Timekeeper Import Wizard did not validate that the End Date was later than the Start Date..  
**Tracking code:** UPD-9432
- When a user copied a matter, the progress notes for that matter would display %20 instead of spaces.  
**Tracking code:** UPD-9557
- In Advanced Search, all values with a lookup list available for selection from a dropdown when creating a search are missing additional operators (such as “Does not contain”). These operators are now available for selection with the dropdown list.  
**Tracking code:** UPD-9636
- Users received a “There is no vendor associated” error message when trying to manually inactivate a timekeeper if the timekeeper had duplicate records.  
**Tracking code:** UPD-9579
- Suite was using unsupported Oracle JDBC driver .jar files.  
**Tracking code:** UPD-9652

## eCounsel

- When activating a vendor with an ampersand (&) in the name, the Suite converts the character into an HTML encoded string.  
**Tracking code:** UPD-9593

## Secretariat

- When shares are redeemed, the Entity displays in the **Ownership** tab with 0% ownership. Additionally, the Corporate Data Sheet Report shows the Entity as a Direct Owner, even though it has 0% Ownership.  
**Tracking code:** UPD-9152
- The Corporate Data Sheet Report did not have the correct structure in Securities Equities section.  
**Tracking code:** UPD-9459
- The Corporate Data Sheet report did not display former names when all parameters are selected.  
**Tracking code:** UPD-8746
- Users are now able to enter a negative number in the Value field of the Transaction Ledger.  
**Tracking code:** UPD-9316
- The **Export** button was not exporting the Timekeeper ID field.  
**Tracking code:** UPD-9349

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## Dependencies

This service pack requires the **previous** installation of the following:

- suite8.11.0.sp9.1
- boxir4-suite8.11.0.sp8.1

This service pack includes an update to the following:

- Suite (suite8.11.0.sp10.1)
- boxir4 if using Business Objects (boxir4-suite8.11.0.sp10.1)



- Suite Manager (SuiteManager.exe)
- Corridor (corridor3.1.0.sp1.1)
- Database scripts for Microsoft SQL Server databases or Oracle databases
- HotDocs templates for Oracle database deployments

The following reports need to be re-imported:

- Corporate Data Sheet

If using Smart Invoice with a Corridor integration, the following task needs to be installed:

- CorridorVendorMatters

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## Downloads

Click on a link below to download a compressed file that can be used to access the necessary files used in the installation process.

- [Suite Manager \(SuiteManager.exe\)](#)
- Database scripts for [Microsoft SQL Server databases](#) or [Oracle databases](#)
- [HotDocs templates for Oracle database deployments](#)

The following reports need to be re-imported:

- [Corporate Data Sheet](#)

If using Smart Invoice with a Corridor integration, the following task needs to be installed:

- [CorridorVendorMatters](#)

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## Installation Instructions

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### Suite Installation Instructions

1. Stop the Bridgeway Suite application on the Java application server.
2. Use Update Manager to install the **suite8.11.0.sp10.1** update. Update Manager will back up the following files:
  - htm\ecounsel\corr\_activatelawfirm.htm
  - javascript\listpagemanager.js
  - javascript\newmatter\_include.js
  - javascript\searchmanager.js
  - toplink\BSICommon\com.bsi.dataclasses.bsicommon.LkupMatter.descriptor
  - toplink\Calendar\com.bsi.dataclasses.calendar.Calendar.descriptor



- toplink\Invoice\com.bsi.dataclasses.invoice.LkupInvoice.descriptor
- toplink\Invoice\com.bsi.dataclasses.invoice.LkupInvoice.topclass
- toplink\Invoice\com.bsi.dataclasses.invoice.MatterInvoice.descriptor
- toplink\Invoice\Invoice.project
- toplink\PeopleEntity\com.bsi.dataclasses.peopleentity.Company.descriptor
- toplink\PeopleEntity\com.bsi.dataclasses.peopleentity.Court.descriptor
- toplink\PeopleEntity\com.bsi.dataclasses.peopleentity.Person.descriptor
- toplink\PeopleEntity\PeopleEntity.project
- WEB-INF\classes\com\bsi\control\admin\UrlSubstituteRedirectCommand.class
- WEB-INF\classes\com\bsi\control\search\BaseSearchResultsWriter.class
- WEB-INF\classes\com\bsi\control\search\GetLooukUpFields.class
- WEB-INF\classes\com\bsi\control\search\HtmlSearchResultsWriter.class
- WEB-INF\classes\com\bsi\control\secretariat\entity\OwnershipListCommand.class
- WEB-INF\classes\com\bsi\dataclasses\bsicommon\LkupMatter.class
- WEB-INF\classes\com\bsi\dataclasses\calendar\Calendar.class
- WEB-INF\classes\com\bsi\dataclasses\invoice\LkupInvoice.class
- WEB-INF\classes\com\bsi\dataclasses\invoice\MatterInvoice.class
- WEB-INF\classes\com\bsi\dataclasses\matter\MatterCostDetailHelper.class
- WEB-INF\classes\com\bsi\dataclasses\matter\MatterInsurancePolicyHelper.class
- WEB-INF\classes\com\bsi\dataclasses\matter\MatterLitigationHelper.class
- WEB-INF\classes\com\bsi\dataclasses\matter\PhysicalFileHelper.class
- WEB-INF\classes\com\bsi\dataclasses\matter\TrademarkHelper.class
- WEB-INF\classes\com\bsi\dataclasses\peopleentity\Company.class
- WEB-INF\classes\com\bsi\dataclasses\peopleentity\Court.class
- WEB-INF\classes\com\bsi\dataclasses\peopleentity\Person.class
- WEB-INF\classes\com\bsi\datalogic\ExecuteSearch.class
- WEB-INF\classes\com\bsi\datalogic>ListLogic.class
- WEB-INF\classes\com\bsi\datalogic\MetadataBuilder.class
- WEB-INF\classes\com\bsi\datalogic\ModuleSearch.class
- WEB-INF\classes\com\bsi\datalogic\admin\BSICommonMetadataBuilder.class
- WEB-INF\classes\com\bsi\datalogic\admin\SuiteSystemSettings.class
- WEB-INF\classes\com\bsi\datalogic\calendar\CalendarNavigation.class
- WEB-INF\classes\com\bsi\datalogic\calendar\search\CalendarSearch.class
- WEB-INF\classes\com\bsi\datalogic\calendar\search\CalendarSearcher.class
- WEB-INF\classes\com\bsi\datalogic\calendar\search\RelatedMatterSearcher.class
- WEB-INF\classes\com\bsi\datalogic\helpers\RecordBuilder.class
- WEB-INF\classes\com\bsi\datalogic\invoice\InvoiceDetailList.class
- WEB-INF\classes\com\bsi\datalogic\invoice\corridor\BSI\_SI\_ServiceHttpBindingStub.class



- WEB-INF\classes\com\bsi\datalogic\invoice\corridor\IBSI\_SI\_ServicePortType.class
- WEB-INF\classes\com\bsi\datalogic\invoice\search\InvoiceSearch.class
- WEB-INF\classes\com\bsi\datalogic\invoice\search\MatterInvoicePlayerSearcher.class
- WEB-INF\classes\com\bsi\datalogic\invoice\search\MatterInvoiceSearcher.class
- WEB-INF\classes\com\bsi\datalogic\matter\DocumentUpdate.class
- WEB-INF\classes\com\bsi\datalogic\matter\MatterMetadataBuilder.class
- WEB-INF\classes\com\bsi\datalogic\matter\MatterPlayerEmploymentInfo.class
- WEB-INF\classes\com\bsi\datalogic\matter\MatterPlayerList.class
- WEB-INF\classes\com\bsi\datalogic\matter\MatterRecordBuilder.class
- WEB-INF\classes\com\bsi\datalogic\matter\MatterUpdate.class
- WEB-INF\classes\com\bsi\datalogic\matter\NewMatterFormBuilder.class
- WEB-INF\classes\com\bsi\datalogic\matter\PhysicalFileActionView.class
- WEB-INF\classes\com\bsi\datalogic\matter\PhysicalFileView.class
- WEB-INF\classes\com\bsi\datalogic\matter\search\CostSearcher.class
- WEB-INF\classes\com\bsi\datalogic\peopleentity\CompanyPersonList.class
- WEB-INF\classes\com\bsi\datalogic\peopleentity\CompanyPersonUpdate.class
- WEB-INF\classes\com\bsi\datalogic\peopleentity\EntityNavigation.class
- WEB-INF\classes\com\bsi\datalogic\peopleentity\PeopleList.class
- WEB-INF\classes\com\bsi\datalogic\peopleentity\PeopleNavigation.class
- WEB-INF\classes\com\bsi\datalogic\peopleentity\search\CompanySearch.class
- WEB-INF\classes\com\bsi\datalogic\peopleentity\search\CourtSearch.class
- WEB-INF\classes\com\bsi\datalogic\peopleentity\search\PeopleSearch.class
- WEB-INF\classes\com\bsi\datalogic\peopleentity\search\RelatedInvoiceSearcher.class
- WEB-INF\classes\com\bsi\datalogic\secretariat\entity\CompanySummary.class
- WEB-INF\classes\com\bsi\datalogic\timekeeper\TimekeeperFileImport.class
- WEB-INF\classes\com\bsi\dataserver\ecounsel\PeopleEntityServerSessionHolder.class
- WEB-INF\classes\com\bsi\billing\collaborati\MapTimekeeperProcess.class
- WEB-INF\classes\com\bsi\repository\BaseDataset\$FindItem.class
- WEB-INF\classes\com\bsi\repository\BaseDataset\$LGSecurity.class
- WEB-INF\classes\com\bsi\repository\BaseDataset\$MruFilter.class
- WEB-INF\classes\com\bsi\repository\BaseDataset.class
- WEB-INF\classes\com\bsi\repository\peopleentity\CompanyPersonDataset.class
- WEB-INF\classes\com\bsi\scheduler\dataclasses\MatterVendorInfo.class
- WEB-INF\classes\com\bsi\scheduler\task\CollaboratiVendorCodesTask.class
- WEB-INF\classes\com\bsi\scheduler\task\CorrMattersForVendorsTask.class
- WEB-INF\classes\com\bsi\servlets\AppLaunchServlet\$ApplyAppParams.class
- WEB-INF\classes\com\bsi\servlets\AppLaunchServlet\$ShowEnvironment.class
- WEB-INF\classes\com\bsi\servlets\AppLaunchServlet.class



- WEB-INF\classes\com\bsi\servlets\NewItemConfigurationParser.class
  - WEB-INF\classes\com\bsi\util\SearchCondition.class
  - WEB-INF\classes\com\bsi\util\calendar\CalUtil.class
  - WEB-INF\classes\com\bsi\util\peopleentity\PEUtil.class
  - WEB-INF\classes\com\bsi\util\search\SearchOperator.class
  - WEB-INF\lib\ojdbc8.jar
  - xsl\bsicommon\userfieldcommon.xsl
  - xsl\matter\newmatterconfig.xsl
  - xsl\matter\playeremploymentlist.xsl
  - xsl\SecrEntity\securitytransactionview.xsl
3. Use Update Manager to install the **boxir4-suite8.11.0.sp10.1** update. Update Manager will back up the following files:
    - WEB-INF\lib\ojdbc8.jar
  4. Restart the Bridgeway Suite application on the Java application server.

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## Suite Manager Installation Instructions

1. Uninstall the current instance of Suite Manager.
2. Extract the files from the **Suite Manager.zip** file.
3. Start the installation program for Suite Manager located in the directory in which the **Suite Manager.EXE** file was extracted.
4. Click **Next** on the **Welcome** screen.
5. On the **License Key** screen, type the license key in the text box and click **Next**.
6. On the **Choose Destination Location** screen, confirm that the Destination Folder is the desired directory location for the program files.
7. On the **Start Installation** screen, click **Next** to begin the installation process.
8. A progress screen will display. You can abort the installation at any time by clicking **Cancel**.
9. On the **Installation Complete** screen, click **Finish**.

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## Database Function Install Instructions for SQL Server Only

1. Using your preferred database tool (SQL Server Management Studio, etc.), make a backup of your Suite database.
2. Login to your query tool as an administrative user.
3. Open the appropriate scripts .ZIP file for your database:
  - suite8.11.0.sp10.1-Scripts-SQL.zip for SQL databases
4. Open the SQL script, search and replace <LOGIN> with the login the application will use to access the database.
5. Run the SQL script.





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## Report Template Installation Instructions

1. Unzip the appropriate report packages for your configuration, depending on which reports, database, and report server are being used. You will need to reimport each report individually.
  - SQL Server or Oracle for your database (the zip files are labeled accordingly)
  - i-net Crystal Reports or SAP BusinessObjects for your report server (the zip files for BusinessObjects are labeled BOE)
2. Open eCounsel and click the **Reports** module.
3. On the **Reports List** page, click the report to be updated and then click the **Reimport** button.
4. On the Reports dialog box, browse to the location for the corresponding .RPT file included with this update release and click the **Upload** button.
5. Click **OK** on the message box.
6. Repeat steps 3 through 5 for each report.

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## Corridor Task Installation Instructions

### To Import the Corridor Vendor Matters Task:

1. In Suite Manager, open the **Scheduler** component, and click the **Template** tab.
2. On the **Select the XML or Script file for import** dialog box, select the **CorridorVendorMatters.xml** file include in the update files and then click **Open**.

### To Schedule the Corridor Vendor Matters Task:

1. In the Suite Manager Scheduler component, click the **Service** tab, and verify that the service has been started.
2. On the **Schedule** tab, select the **Corridor Vendors Matters Task** and click **New**.
3. In the **Schedule** area, create a schedule for the task.
4. Click **Save and Close**.

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## HotDocs Template Installation Instructions

The HotDocs standard templates only need to be re-installed for any on-premise client who is using an Oracle database and wants to place a standard template on a tab.

