

LawMaster Release Notes

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Important Notice – Upgrade Path

Please read all release notes between your current version and the version you are installing to ensure you are aware of all changes and setup requirements between these versions and that you install and test (see suggested testing protocol at the end of this notice) in your Training database before upgrading Production.

Supported upgrade paths for Cuba R2 Onwards

The following are supported upgrade paths to Cuba R2 onwards:

- ❖ *If you are running Portugal, Portugal R2 or Cuba* you can upgrade directly from your current version to Cuba R2.
- ❖ *If you are running a version earlier than Portugal:*
 - You must first upgrade through each public release to get to Portugal. *For example, for releases prior to Portugal, if there are publicly released versions A, B, and C available, you cannot upgrade directly from A to C. You need to upgrade from A to B, and then from B to C.*
 - After stepping through each upgrade to Portugal, you can then upgrade directly to Cuba R2.

Advanced Searching

If upgrading from any version prior to Portugal, you must upgrade Elasticsearch to Version 7.7.1. This is a manual upgrade process details, of which are outlined in the [Advanced Searching White Paper](#) available from the Client Service Centre ➔ Releases.

Pre-Upgrade Tasks

❖ Upgrade Advanced Search

If upgrading from a database version **prior to Portugal** that is running Advanced Searching using Elasticsearch, migrate Elasticsearch Index to Version 7.7.1 following the process outlined in the [Advanced Searching White Paper](#) available from the Client Service Centre ➔ Releases. Further information regarding the upgrade can be found in the [Portugal Release Notes](#).

For hosted clients this will be done as part of the normal upgrade service.

If you wish to test the Elasticsearch migration on a non-Production database, please contact your Account Manager for assistance.

❖ Check-In Folios

We recommend all folios are checked-in prior to upgrading to Cuba if coming from a version earlier than Portugal R2. Additional logic has been added to the check-out functionality around the handling of special characters in file names that may affect the ability to check-in files that were checked-out at the time of upgrade. If this does occur and the user is unable to check-in their file, the user will need to rename the file in their checkout folder to that detailed in the Working Folder of the Folio record. (53571)

Post-Upgrade Tasks

❖ If Payroll module is in use:

- Review and Update Employee, Payroll Payment and Deduction parameters using STP 2 Health Check
- Switch STP Service to Payroll Event 2020

Summary of Changes to Security Settings

- ❖ New **STP 2 Health Check** module ([R62584](#))
- ❖ New **Print Earnings Detail Report** ([R62674](#))
- ❖ New **Elevated UDQ Permissions** field ([R60485](#))

Summary of Changes to Parameters

- ❖ STP Service ([R55654](#))
- ❖ Payroll Codes – Payments ([R61587](#))
- ❖ Payroll Codes – Deductions ([R61587](#))
- ❖ Remove Payroll Parameters ([R60675](#))
- ❖ Payroll Leave Types parameter ([R57139](#))
- ❖ Payroll Processing Options – Sliding Session Timeout ([R60233](#))
- ❖ UDQ Allowed Objects ([R60513](#))
- ❖ New Softdocs Licence Codes ([R62146](#))

New or Updated WP Forms

- ❖ WP Form BB – Bill ([R56318](#) , [R47019](#))
 - ❖ WP Form TTB - Trust Trial Balance ([R60876](#))
-

Known Issues

The following are known issues in the current release:

- ❖ Where the user has Express Viewer for PDF turned off and the Preview pane is selected, focus is lost for up and down arrows when a PDF folio record is selected. Users need to re-select the next folio record using the mouse to continue moving up and down with the arrow keys.
 - ❖ Windows 11 22H2 has caused some display issues with LawMaster, key concerns have been addressed in Cuba R2.
 - ❖ Import Charge Rates will require the Effective Date - date format to be recorded as yyyy-mm-dd. Importing the updated Charge Rates using dd/mm/yyyy will result in the month and date fields being swapped eg 01/07/2023 1st July, 2023 will be recorded as 07/01/2023 7th January, 2023. [R53354](#)
 - ❖ Import GL Journals with GST is currently displaying an error when “Update as well” is selected. Until the issue is resolved users will need to import General Ledger Journals using the Import GL Journals function and record the GST in a separate line. [R53354](#)
-

Operating system requirements & supported platforms

With the introduction of Microsoft’s new set of products and deployment practices, we reviewed our support policy and will be using the following support policies as we develop future versions of our product.

These policies are based on information available on the Microsoft Support Lifecycle site, <https://support.microsoft.com/en-us/lifecycle>.

The purpose of publishing these policies is to ensure clients can plan appropriately when upgrading versions of LawMaster.

Introducing New Microsoft Products

LawMaster aims to commence support for the latest versions of Microsoft tools and systems used with our product 12 months after Microsoft commences "Mainstream Support". We note that if the latest version of Windows 10 or Windows 11 on the General Availability Channel or Microsoft 365 Apps on the Semi-Annual Enterprise Channel is available within two months of the subsequent LawMaster release we will have the opportunity to test against this version.¹ The time lag after the new product support commences depends on the scale of impact of the changes in Microsoft’s product on LawMaster. We are continuously reviewing the support periods for the Microsoft

¹ Currently, if a Microsoft Version is released, for example, in February and the Next LawMaster Version will be released in July, testing will not be completed against the February version until at the earliest May when regression testing commences

product range that fall under the Modern Lifecycle Policy therefore these periods may be subject to change with each new release. We suggest you maintain products under these policies at the version we have tested against as we cannot guarantee compatibility with future versions.

Phasing out Older Microsoft Versions

Conversely, when a Microsoft product or service moves out of “Mainstream Support”, as defined by Microsoft’s product life cycle, we will no longer support these versions for future releases.

Earlier versions of LawMaster running on older Microsoft products are supported whilst the LawMaster version remains supported, but because of Microsoft's "Extended Support Phase" only providing paid support, additional costs might be incurred if Microsoft support becomes necessary.

The following table provides a summary of our support by Microsoft product. Where a LawMaster Version Name is noted, support ends on release of that Version. Where the end date for mainstream support is beyond our current version plans, an estimate of the likely date of release is included.

IMPORTANT NOTE:

- ❖ **LawMaster versions from 10.14 onward must install .NET 4.8 or later on the server and .NET 4.8 (runtime) or later on the client systems.**

Microsoft Product Support – Cuba R2 Release

Microsoft Product	Microsoft Support End	Mainstream	LawMaster Support Ends (by Version Name or Date)
Windows Server			
<ul style="list-style-type: none"> LTSC (not SAC) Non IOT Editions 			
2016 Server		11/01/2022	Cuba R2
2019 Server		09/01/2024	April 2024
Microsoft SQL Server			
<ul style="list-style-type: none"> Standard or Enterprise Edition GDR Updates 			
2016 SP3		14/7/2026	November 2026
2017		11/10/2022	November 2022
2019		14/01/2025	April 2025
Windows Desktop			
<ul style="list-style-type: none"> Pro or above 64-bit General Availability Channel or Semi-Annual Channel 			
Windows 10		13/06/2023	July 2023
<ul style="list-style-type: none"> Version 21H2 			
Windows 10		14/05/2024	June 2024
<ul style="list-style-type: none"> Version 22H2 			
Windows 11		10/10/2023	November 2023
<ul style="list-style-type: none"> Version 21H2 			
Windows 11		14/05/2024	June 2024
<ul style="list-style-type: none"> Version 22H2 			
Office Installations			
<ul style="list-style-type: none"> 64-bit * Installed on PC Semi-Annual Enterprise Channel for MS 365 Apps 			
Office 2019		10/10/2023	November 2023
Office 2021		13/10/2026	November 2026
Microsoft 365 Apps		14/03/2023	April 2023
<ul style="list-style-type: none"> Version 2108 			
Microsoft 365 Apps		12/09/2023	October 2023
<ul style="list-style-type: none"> Version 2202 			

* We recommend 64-bit Office is installed prior to upgrading to the next version of LawMaster.

Accounting General

Duplicate Payment Run Numbers should not be generated

60178

When user selects Generate Direct Deposit Payments, if the Run Number has already been used (for any Bank), the next unused Run Number will be calculated using the Max Run Number from Payment_Run and Receipt_Run tables and the ZZ-RN parameter updated.

Client and Matter Maintenance

Handle Duplicate Address Word in Text Record Error

60981

In certain circumstances updating an entity address raised an Address_WIT record exists error. The issue has now been resolved and the user can update an existing entity address and associated Address_WIT record without error.

Costing and Billing

Disbursement Narrative field on WP Form Bill Increased

47019

Disbursement Narrative field on WP Form BB - Bill in Table 10 and Table 11 has been increased so that the full 512 characters allowed on the Disbursement Code Description will be displayed.

Updates to Static Fields on WP Form BB - Bill

56318

The Static Fields on WP Form BB - Bill have been updated as follows:

- ❖ A new Static Field 116 Entity ID of Billing Invoice Entity has been added which will return the Entity ID of the Billing Invoice Entity in Static Field 26.
 - ❖ The description of Static Field 113 has been updated to 'Email Address of Billing Invoice Entity'.
 - ❖ The description of Static Field 26 (which is the basis of Static Fields 113 and 116) has been updated to 'Name and Address (1 field) of Billing Invoice Entity'.
-

Integrated Searching

Incorrectly formed GlobalX Searches are raising an exception error

61550

Where Matter Number and UserID is not available in required format for GlobalX Searches undertaken from LawMaster, User ID 'PROADM' will be substituted to allow search results and cost records to continue being recorded in LawMaster.

Integration Services

Resources API should not get/create/modify passwords

60487

PUT/GET/POST commands override the value of the password parameter so that:

1. Password values are not returned
 2. Password values are not updated on tables
 3. Password values are not created on tables (these will need to be updated by an administrator)
-

Knowledge Management

Omni Search includes Request Searching

59753

When users enter a number OR alphanumeric term in the Omni Search field, the Request category will search on the Request Details field.

When users enter a prefix of "r-" or "R-" followed by a number or alphanumeric term in the Omni Search field, they will be able to search on Request details field, and only the Request category will be displayed.

Where users double click on a search result, the Browse Requests screen will open with that Request displayed. Where users select "View all Request Results" the Browse Request screen will open with all Requests returned in the search displayed. If Browse Requests window has custom sorting, this will override the default order in Omni Search. Users need to clear sorting to revert back to search result order.

Exact Match of Phrase supported for prefix searching in Omni Search

59753

Searching for exact match of phrase is now supported when using prefix searching with Omni Search.

Handle missing Document Group in Templates for Omni Search

62939

Corrected an issue where search results were returning an error in Omni Search if the Document Groups 'PT' Parameter had been deleted whilst associated with a Document Template.

Outlook

Internal Email Addresses Imported from Outlook Contacts

58715

Corrected an issue where Outlook reference was being imported for internal contacts rather than the email address from My Contacts → Context Menu → Import Outlook Contact.

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<p>Update Outlook Add-in Regex Implementation to support Multiple Matches</p> <p>The Outlook Add-in Regex rules have been updated as follows:</p> <ol style="list-style-type: none"> 1. Where 'Show Request System' is unticked, ignore the key word 'request' in email subject line 2. Where 'Show Request System' is ticked, prioritize the key word 'matter' over the key word 'request' in email subject line 	60213
<p>Outlook Add-in - Save to Folio</p> <p>When user saves an email via LawMaster Ribbon ➔ Save to Folio all lookup windows are now displayed in front of the Floating File Note/Folio Precis window.</p>	60630
<p>Payroll</p>	
<p>Transition Method for STP Phase 2</p> <p>LawMaster has implemented the Transition Method of reporting the full YTD amount using the 2020 Pay Service. Further details on how to proceed with the switching of the STP Service to 2020 have been outlined in the User Guidelines for STP Phase 2.</p>	61636
<p>Provide ability to Switch STP Service Versions</p> <p>A new field has been added to the STP Settings tab of the Payroll ➔ Processing Options Parameter called 'STP Service' which enables the user to switch to the new STP Phase 2 reporting method labelled 'Payroll Event 2020'.</p> <p>A dropdown list for 'STP Service' is provided with values of 'Payroll Event 2018' or 'Payroll Event 2020'.</p> <p>On upgrade to Cuba R2 the parameter value will be set to 'Payroll Event 2018'.</p>	55654
<p>New Payroll Code Parameters for Payments and Deductions</p> <p>On upgrade to Cuba R2, Payroll Code parameters (Parameters ➔ Set Parameters ➔ Payroll) have been migrated and split into two separate parameters to better support the individual requirements of Payments and Deductions. The original Payroll Code parameters have been removed.</p> <p>Validation has been added on Payroll Payment and Deduction parameters that do not commence with the correct prefix.</p> <ol style="list-style-type: none"> 1. For Payroll Payment parameters the payroll code must begin with H or A 2. For Payroll Deduction parameters the payroll code must begin with D <p>An audit trail of the deletion of all PC Parameters can be accessed via Menubar ➔ Parameters ➔ Audit Trail for All Parameters.</p>	60675 61773

Following the upgrade to Cuba R2, the user can assign ATO Reporting Codes and Sub Codes on Payroll Codes - Payment parameters as follows:

1. Gross
2. Overtime Earnings
3. Leave
4. Allowances
5. Bonuses and Commission
6. ETP
7. Lump Sum Payment

On upgrade, the reporting category for most Payments commencing with H or A will default to Gross and should be reviewed as part of the STP 2 Health Check.

The existing Allowance Code field label has been changed to "Payroll Event 2018 Allowance Code" to differentiate the 2018 and 2020 STP Allowance categories.

Payroll Payment Codes - Do Not Report to ATO Category

A Reporting Category option of 'Do Not Report to ATO' (PCPN) has been added to the Payroll Codes - Payments parameter. This option replaces the "Do Not Report to ATO" tick box that was previously available.

On upgrade, any Payroll Payment parameters that had the 'Do Not Report to ATO' tick box selected will be set to the equivalent Reporting Category.

Any Payroll Codes with this option selected will not be included in the STP Report or STP Reconciliation.

Calculation and Reporting of Gross Amount for STP Phase 2

Under STP Phase 2, the Gross Amount is the total of Reportable Income LESS Separately Itemised Components that are now discretely reported. Gross is the residual amount that remains.

Where STP Service is set to Payroll Event 2020, the amount reported as Gross will be the sum of Payroll Payment Codes for each employee assigned to the ATO Reporting Category of Gross. Validation has been added to ensure that the sum of an Employee's YTD transactions less those separately reportable equals that reported under the label of Gross.

STP Phase 2 - ATO Derived Aggregated Gross

62182

To manage the introduction of negative YTD amounts, a new concept of ATO derived aggregated gross income has been introduced. Whilst specific payment types may be negative, the sum of the reportable payments less the Salary Sacrifice YTD amount must be zero or a positive amount per income stream collection.

If the ATO Derived Aggregated Gross amount is negative a validation error message will be displayed in the Audit Payroll Module and STP Reconciliation validation tab as follows:

"The derived aggregated gross YTD amount is \$[calculated value] and must not be a negative amount. This is calculated as the sum of Gross, Paid Leave, Allowance, Overtime, Bonuses and Commissions, Lump Sum Payment (Type W only) less Salary Sacrifice."

Rounding of Gross Amount in STP Report

62926

The amount reported in STP Report Pay Event and Update Event in following fields should include cents and NOT be rounded:

1. Employer/Parent section - Payer Total Gross Payments Amount
2. Employee/Child section - Gross Amount

Value reported in Gross field of STP Reconciliation for 2020 Service will also include cents and not be rounded.

STP Phase 2 - PAYG Reporting

62183

PAYG reported in STP Phase 2 must be the YTD value for the nominated employee and selected year less any PAYG on ETPs that are separately itemised within the ETP section of the STP Report.

STP Phase 2 – Overtime

61608

On upgrade to Cuba R2, the user can assign Payroll Payment Codes to a Reporting category of Overtime Earnings to assist with the calculation and reporting of this category for Payroll Event 2020

On upgrade to Cuba R2, the user can assign Payroll Payment Codes commencing with H or A to a Reporting Category of Leave.

Where the Leave Category has been selected for a Payroll Payment Code, a Leave Type Sub Category must also be selected.

Paid Leave subcategories are to be reported for STP Phase 2 as:

- ❖ P - Paid Parental Leave
 - ❖ W - Workers Compensation
 - ❖ A - Ancillary and Defence Leave
 - ❖ C - Cash out of Leave in service
 - ❖ U - Unused leave on termination
 - ❖ Other Paid Leave
-

On upgrade to Cuba R2, the user can assign Payroll Payment Codes commencing with A to an ATO Reporting Category of Allowances.

Where Reporting Category of Allowances is selected, a Reporting Sub Category must also be selected. Allowance Reporting Sub Categories under STP Phase 2 are as follows:

- ❖ Cents per kilometre
- ❖ Award Transport Payments
- ❖ Laundry
- ❖ Overtime Meal Allowances
- ❖ Domestic or Overseas Travel Allowances and Overseas Accommodation Allowances
- ❖ Tool Allowances
- ❖ Qualification Allowances
- ❖ Task Allowance
- ❖ Other - Non-deductible
- ❖ Other - Uniform
- ❖ Other - Private Vehicle
- ❖ Other - Home Office
- ❖ Other - Transport/Fares
- ❖ Other - General
- ❖ Other - Other (which will include the JobKeeper and Jobmaker codes as well as any other allowances that do not fall into the above categories)

On upgrade to Cuba R2, existing Allowances with a Payroll Event 2018 Allowance Code defined will be mapped as follows:

- ❖ Car to Cents per kilometre
- ❖ Transport to Award Transport Payments
- ❖ Laundry to Laundry
- ❖ Meals to Overtime Meal Allowances
- ❖ Travel to Domestic or Overseas Travel Allowances and Overseas Accommodation Allowances
- ❖ Other to Other-Other

We recommend you review these mappings in the STP2 Health Check – Payments tab to ensure they are correct for your circumstances.

STP Phase 2 - Bonuses and Commissions

On upgrade to Cuba R2, the user can assign Payroll Payment Codes commencing with H or A to an ATO Reporting Category of Bonuses and Commissions.

On upgrade to Cuba R2 or when generated in parameters on first adding an ETP (Input and Review Timesheets ➔ context menu ➔ Add Employment Termination Pay) the following Payroll Code - Payment parameters will be updated or created:

1. Payroll Code = HETPT

Description = ETP - Taxable Component No Super
Ordinary Time Earnings = N
Scale Factor = blank
Flat Rate = blank
No PAYGW = N
Reporting Category = ETP (PCPE)
Reporting Sub Category = blank
Payroll Event 2018 = blank

2. Payroll Code = HETPX

Description = ETP - Tax Free Component No Super
Ordinary Time Earnings = N
Scale Factor = blank
Flat Rate = blank
No PAYGW = Y
Reporting Category = ETP (PCPE)
Reporting Sub Category = blank
Payroll Event 2018 = blank

3. Payroll Code = HETPS

Description = ETP - Taxable Component Super
Ordinary Time Earnings = Y
Scale Factor = blank
Flat Rate = blank
No PAYGW = N
Reporting Category = ETP (PCPE)
Reporting Sub Category = blank
Payroll Event 2018 = blank

The ability to select the appropriate Taxable Component ETP Payment Code HETPT or HETPS is provided from Input and Review Timesheets ➔ context menu ➔ Add Employment Termination Pay, with HETPT being the default.

On upgrade to Cuba R2, the user can assign Payroll Payment Codes commencing with H or A to an ATO Reporting Category of Lump Sum Payment.

Where Reporting Category of Lump Sum Payment is selected, a Reporting Sub Category must also be selected. Lump Sum Payment Reporting Sub Categories under STP Phase 2 are as follows:

- ❖ Lump Sum A Type R
- ❖ Lump Sum A Type T
- ❖ Lump Sum B
- ❖ Lump Sum D
- ❖ Lump Sum E
- ❖ Return to Work Payment

On upgrade to CubaR2, the following pre-defined system pay codes will be mapped to the STP Phase 2 Reporting Category of Lump Sum Payment with Reporting Sub Category as follows:

- ❖ ALSAR - Lump Sum A Type R
- ❖ ALSA - Lump Sum A Type T
- ❖ ALSB - Lump Sum B
- ❖ ALSD - Lump Sum D
- ❖ ALSE - Lump Sum E

STP Phase 2 - Lump Sum W Return to Work Payments

On upgrade to Cuba R2 a new Payroll Payment Code will be created for Lump Sum W Return to Work payments as follows:

- ❖ Payroll Code = ALSW
- ❖ Description = Return to Work Payment Lump Sum W
- ❖ Ordinary Time Earnings = ticked
- ❖ Scale Factor = 0
- ❖ Flat Rate = 0
- ❖ No PAYGW = unticked
- ❖ Reporting Category = Lump Sum Payment
- ❖ Reporting Sub Category = Return to Work Payment

If a Payment Code of 'ALSW' already exists on upgrade, then a Lump Sum W Payment parameter will not be created, and one will need to be added manually.

STP Phase 2 - Lump Sum E Financial Year

A new field 'Financial Year' will be displayed in the Timesheet ➔ Add Allowances window which allows the user to select the financial year against which the Lump Sum E Pay Code is attributed. Where Lump Sum E Pay Code is used, this field will be mandatory.

STP Phase 2 - Reporting of Lump Sum D	62224
In STP Payroll Event 2018 if a Payee only had a Lump Sum D being reported, then the payee record was discarded and not sent to the ATO. In STP Phase 2 Payroll Event 2020 these Payee records are now sent to the ATO.	
STP Phase 2 - Fringe Benefits Reported	57497
Reportable Fringe Benefits amount will be included in Payroll Event 2020 STP Reporting.	
STP Phase 2 - Super Liability Reported	57517
Super Liability amount will be included in Super Entitlement YTD fields for Payroll Event 2020 STP Reporting.	
STP Phase 2 – Calculation of Super Liability	61951
Where STP Reporting is set to Payroll Event 2020, the calculation for Super Liability to be reported in the Super Entitlement Year to Date section of the STP Report is as follows:	
Sum of Super transactions where record is NOT 'Employee Influenced'.	
STP Phase 2 - RESC Reported	57518
Where STP Reporting is set to Payroll Event 2020, the calculation for Reportable Employer Superannuation Contribution (RESC) to be reported in the Super Entitlement Year to Date section of the STP Report is as follows:	61931
Sum of Super transactions where record is 'Employee Influenced'	
PLUS	
Sum of Amounts allocated to Salary Sacrifice Super (RESC) Deductions for the selected Year	
Note that only audited transactions are included in the calculation.	

Following the upgrade to Cuba R2, the user can assign a Deduction Code category on Payroll Deduction Codes as follows:

1. Do Not Report to ATO
2. Salary Sacrifice – Super (RESC)
3. Salary Sacrifice – Super (Not RESC)
4. Salary Sacrifice – Other Employee Benefits
5. Workplace Giving
6. Fees

On upgrade, any existing Deduction parameters will be mapped as follows:

1. Payroll Code commences with DSU AND After Tax is not checked will default to Salary Sacrifice – Super (RESC)
2. Payroll Code commences with DSU AND After Tax is checked will default to Do Not Report to ATO
3. The Deduction Code of Fees or Workplace Giving will be retained if already allocated.
4. All other deductions will be assigned as "Do Not Report to ATO" option and are therefore not reportable in STP Phase 1 or Phase 2.

Validation has been added to the Add/Modify Payroll Deduction Code parameter as follows:

1. 'After Tax' must not be selected for the following Deduction categories:
 - 1.1 Salary Sacrifice – Super
 - 1.2 Salary Sacrifice – Other Employee Benefits
2. 'After Tax' must be selected for the following Deduction categories:
 - 2.1 Workplace Giving
 - 2.2 Fees

STP Phase 2 - Salary Sacrifice Deductions Parameter and Reporting Changes

Salary Sacrifice Deductions are reported in Payroll Event 2020 as two categories:

1. S - Salary Sacrifice - Super, or
2. O - Salary Sacrifice - Other Employee Benefits

Salary Sacrifice - Super has been further categorised to indicate whether the deduction is also reported to the ATO as RESC. The more common option is Salary Sacrifice Super (RESC).

Each Pay/Submit or Update Event sent via the Payroll Event 2020 Service will include a Tax Treatment code made up of 6 characters where:

- ❖ CHAR 1 = R, F, N, or D
- ❖ CHAR 2 = T, N, F, A, B, or V
- ❖ CHAR 3 = S, X
- ❖ CHAR 4 = X
- ❖ CHAR 5 = H, F, X
- ❖ CHAR 6 = 0, 1-9, X

Any Tax Scale combination not included in validation table `stp_tax_treatment_code` will default to XXXXXX in the STP Report. This combination will report as an error from the ATO.

STP Phase 2 - Tax Offset reporting Payroll Event 2020

Tax Offset errors are reported in the Validation Errors tab at the time of running the Audit Payroll Transactions and the STP Reconciliation Report as follows, "Tax Offset amount can only be applied where Tax Free Threshold claimed".

Validation Errors will disable STP Pay or Update Events

Where the Validation Errors tab displays items with a status of Error in the Audit Payroll module the ability to select context menu "Audit Pays" and grid menu option "Audit Payroll Transactions" will be disabled until the errors have been resolved.

Where Validation Errors tab displays items with a status of Error in the STP Reconciliation module the ability to select context menu "Submit STP Update", "Submit EOY Finalisation Declaration to ATO" and "Reset Finalisation Indicator to False" will be disabled until the errors have been resolved.

Warning messages will still allow the STP Report to be sent but may cause a partial rejection by the ATO.

Where STP Service is set to Payroll Event 2020, records that fail Tax Scale validation will be reported in the Validation Errors tab of the Audit Payroll module and STP Reconciliation module as follows:

- ❖ Error Level - Error
- ❖ Record - "Employee"
- ❖ Field - "Tax Scale"
- ❖ Message Description - 'Tax Scale must be set to a valid option.' + [Message - Short Description] from validation rules.

For example:

1. Tax Scale must be set to a valid option. Tax Treatment Code is invalid.
2. Tax Scale must be set to a valid option. Medicare Levy Reduction not valid for first two characters of Tax Treatment Code.

Validation on Cessation Type and Date

Cessation Date and Cessation Type errors are reported in the Validation Errors tab at the time of running the Audit Payroll Transactions and the STP Reconciliation Report as follows:

- ❖ Cessation Date cannot be earlier than Date Hired.
- ❖ Cessation Date cannot be greater than 10 years from Today.
- ❖ Cessation Code is not present.

Validation on Switching STP Service

The STP Service cannot be changed to Payroll Event 2020 if there are any data validation errors.

In Parameters ➔ Payroll ➔ Payroll Processing Options ➔ STP Settings tab, validation has been added to the STP Service so that the service cannot be changed to Pay Event 2020 (STP Phase 2) processing until all required data is in a safe state. This includes:

- ❖ Outstanding STP Submissions where the status is "Waiting for ATO Response", "ATO Response Overdue", "Sending" or "Sending Delayed" for each company set to STP reporting
- ❖ Unaudited Employee records exist for the current financial year.
- ❖ Company level validation errors
- ❖ Employee validation errors
- ❖ Payroll Payment or Deduction Codes have not been marked as Reviewed
- ❖ Payroll Transactions and Employee Master Control Table not balanced

Audit Trail shows switching of STP Service

57301

When Payroll ➔ Processing Options Parameter is switched from STP Service 'Payroll Event 2018' to 'Payroll Event 2020', the change is recorded in the Audit Trail (Parameters ➔ View Audit Trail for All Parameters).

Validation on ETP for STP Phase 2

57490

Validation has been added to the 'Add Employment Termination Pay' form on selection of OK as follows:

1. Where an ETP Payment Code of D, N, B or T is selected the nominated Employee must have a Cessation Type Code of D – Death.
2. Where the ETP Taxable Component is greater than 0 an amount greater than 0 must be reported in the Tax field.
3. Records that fail the Validation Rules will be reported in the Validation Errors tab of the Audit Payroll module or STP Reconciliation as follows:

Error Level - Error

Record - Employee

Identifier - Employee No.

Field - Employment Termination Payments

Description - 'ETP details recorded against this employee are invalid.' + [Message - Short Description] from validation rules

For example, "ETP details recorded against this employee are invalid. When the Tax Treatment Code is DBXXXX, a Cessation Reason Code of D and an ETP Type Code of D, B, N, or T must be provided."

New Field on STP Report Status to display Pay Event Service used

56993

In Cuba, a new column was added to the STP Report module called 'STP Service' which lists the STP Pay Event Version used to compile the STP Report at the time it was sent to the ATO.

On upgrade to CubaR2, all future STP Reports will display the STP Service used to create the STP Report.

New Option on Payroll Leave Types parameter

57139

A new option 'Do Not Report on Pay Advice' has been added to Payroll Leave Types parameter. If ticked, the associated Leave Transactions recorded against an Employee will not be reported in the WP Form PPA Payroll Earnings Advice or associated Template fields.

Enhancements have been made to WP Form PPA – Payroll Earnings Advice so that any Leave type having:

- ❖ 'Do Not Report on Pay Advice' option, or
- ❖ a balance of 0 hrs

will be excluded from Table T3 – Leave.

Payroll Earnings Advices can be printed from:

1. Main Menu ➔ Payroll Processing ➔ Print Pay Advices
2. Personnel ➔ Payment History ➔ context menu - Print Pay advice
3. Employee Details ➔ Payment History ➔ context menu - Print Pay advice

Bonus Tax Calculation option in Payroll Payments Parameter

57397

A new Bonus Tax Calculation checkbox has been added to the Payroll Codes - Payments parameter.

When selected, tax calculated on amounts recorded against this Payroll Code will use the Bonus Tax calculation detailed under the ATO [Schedule 5 Tax Table Method A](#). The 'Ordinary Times Earnings' field which was previously labelled 'Normal Pay' will only be used for the calculation of Super Liability and Leave calculations.

On upgrade to Cuba R2, where Payroll Payments ABON parameter has 'Normal Pay' unticked the 'Bonus Tax Calculation' field will be selected.

STP Reconciliation Report reports both 2018 and 2020 STP Services

61703

A dropdown selection list labelled 'STP Service' has been added to the STP Reconciliation Report which allows the user to fetch reconciliation data based on either the 2018 or 2020 STP requirements.

If Payroll Processing Options are set to STP Service 'Payroll Event 2018', by default 'Payroll Event 2018' will be selected and the STP Reconciliation report will be displayed in the format for STP Phase 1.

If Payroll Processing Options are set to STP Service 'Payroll Event 2020', by default 'Payroll Event 2020' will be selected and the STP Reconciliation report will be displayed in the format for STP Phase 2.

Where the 'Payroll Event 2020' option is selected the following sub tabs are displayed in the STP Reconciliation report:

1. Paid Leave
2. Allowances
3. Deductions
4. Salary Sacrifice
5. Lump Sums
6. ETP

Sub Tabs amount columns are summed.

Exporting the STP Reconciliation report to Excel includes the sub tabs grouped by employee.

Update Last STP Report Sent field in STP Reconciliation

63043

Corrected an issue where Last STP Report Sent field on STP Reconciliation Report was not getting updated in certain circumstances.

STP Phase 2 - Health Check Employee Details

62584

A new module called 'STP2 Health Check' has been added to Main Menu → Payroll and Personnel → Single Touch Payroll.

On upgrade to Cuba R2, the STP2 Health Check module will be automatically available for Users / DEF Users that have access to STP Reconciliation module.

Under the Employees tab, all Employees that are Active (no cessation date) or have a cessation date within the current payroll year or later will be displayed for review. Errors or warnings will be displayed on the card and users with appropriate security can double click the card to open the employee record and make the necessary changes. All Employees should be reviewed to ensure there are no warnings or errors reported prior to switching to Payroll Event 2020.

STP Phase 2 - Health Check Payroll Codes - Deductions

62585

A list of all Payroll Deduction Codes set as Visible will be displayed in the STP2 Health Check module under the Deductions tab.

Validation errors or warnings will be reported and users with appropriate security can double click on the Deduction card to make the necessary changes to parameter settings. Once the errors or warnings have been cleared the user must select the Reviewed checkbox provided to indicate the parameter is ready prior to switching to STP Service Payroll Event 2020.

STP Phase 2 - Health Check Payroll Codes - Payments

62586

A list of all Payroll Payment Codes will be displayed in the STP2 Health Check module under the Payments tab, excluding:

1. JobKeeper Allowance Codes with Payroll Code like AJK% AND Reporting Category = PCPA and Reporting Sub Category = OD-OTHER, OR
2. JobMaker Allowance Codes with Payroll Code like AJM% AND Reporting Category = PCPA and Reporting Sub Category = OD-OTHER, OR
3. Payroll Payments set to Not Visible

Validation errors or warnings will be reported against each Payment parameter and users with appropriate security can double click on the Payment card to make the necessary changes to parameter settings. Once the errors or warnings have been cleared the user must select the Reviewed checkbox provided to indicate the parameter is ready prior to switching to STP Service Payroll Event 2020.

Validation on Payroll Parameters in STP2 Health Check

62811

Where user is on the 2018 STP Service an Error Message will be displayed in the STP2 Health Check if the Payroll Payments or Deductions parameters have not been Reviewed.

Where user is on the 2018 STP Service a Warning Message will be displayed in the Audit Payroll and STP Reconciliation - Validation Errors tab where one or more visible payroll parameters have not been checked as Reviewed.

The user can continue to run 2018 STP Reports from Audit Payroll and STP Reconciliation where this warning is being reported but will be unable to switch to the 2020 STP Service until all Payment and Deduction parameters have been reviewed.

Validation on Calculate Pay Module

62263

Validation has been added to the Calculate Pay module to ensure that all Payroll Codes used within the Pay Run have been allocated an ATO Reporting Category and Sub Category (if required).

STP Phase 2 - Remove invalid symbols from Employee Names

62492

Invalid symbols such as accent marks (example èèèè) are now stripped from employee name fields in the STP Report.

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Validation has been added to Audit Payroll, STP Reconciliation and STP2 Health Check modules for both 2018 and 2020 Pay Service and the following messages will be displayed when conditions are met on Payroll parameters:

1. "A 2018 Allowance Code cannot be selected where Payment is not reportable to the ATO."
2. "Payroll Code XXX does not have an ATO Reporting Category or Sub Category assigned."
3. "Payroll Code XXX does not have a Salary Sacrifice Reporting Category assigned."

Validation on Employment Basis Code / Classification Code

Where an employee has been assigned a Classification Code that is not associated with a valid Employment Basis Code the following validation message will be displayed:

1. "Employment Basis Code must be one of the following values: C, F, P, D, or N."
2. "Employment Basis Code has not been selected for Payroll Classification Code (FA)"

Validation on Employee Phone Number fields

Phone Numbers sent to the ATO via STP must follow the pattern constraints of 0-9 a-z A-Z and space. Validation has been added to the Audit Payroll, STP Reconciliation and STP2 Health Check modules to warn users if the phone number recorded against employees do not meet these rules.

From Cuba R2, LawMaster will support the reporting of Super Liability for Contractors using the Employment Basis Code of N - Non Employee. This voluntary reporting of Super Liability option will only be available under the STP2 2020 Pay Service.

On upgrade to Cuba R2, a new Payroll Classification Code of TN - Non-Employee for Super Liability purposes will be created with an Employment Basis Code of N - Non-Employee.

Employees with an Employment Basis Code of N – Non-Employee cannot have the following values recorded:

1. Earnings History
2. Fringe Benefits Tax
3. Employee Influenced Super

On selection of the Payroll Classification Code associated with the Employment Basis Code of N - Non-Employee the user will be prompted to associate the Entity ID of the Contractor which will require the Contractor ABN to be recorded. The ABN will be reported to the ATO in the STP Report.

Validation has been added to the Generate Timesheets and Input and Review Timesheet modules to ensure earning records are not entered against a Non-Employee.

Non-employees for Super Liability reporting can still be recorded as terminated and have the End of Year Finalisation Indicator reported to the ATO.

As there is no earnings history and the Super is added via a Super Journal the Super Liability is reported to the ATO via an Update Event from the STP Reconciliation Report.

Tax Treatment Code and Validation for Death Beneficiaries

When an employee is assigned a Payroll Classification Code of Death Beneficiary on the Employee Details form the Pay Details tab is disabled and the date of birth defaults to 01/01/1800, in accordance with ATO requirements. Validation will be performed when processing payments to ensure that a valid combination of Cessation Type Code (D) and ETP Type Code (D, B, N, or T) is used. Non-ETP payments will be restricted, and the Tax Treatment Code will be set to DBXXXX.

STP Phase 2 - Report Downwards Variation

Where an employee has a Tax Scale commencing with F selected in Pay Details tab a Tax Treatment Code of DVXXXX - Downwards Variation will be provided to the ATO in the STP Report.

<p>ATO Product ID for LawMaster Hosted Clients</p> <p>The ATO has provided a separate Product ID for LawMaster clients to identify hosted clients separately from on premise installations. The system will identify which Product ID to use on STP Reports with no action required by clients.</p>	62553
<p>Accessing Payroll Parameter from Validation Errors Tab</p> <p>Double-clicking a Payroll Parameter record from the Validation Errors tab on the STP Reconciliation Report or the Audit Payroll Transactions module opens the Modify Parameter dialog directly.</p>	62626
<p>Ordinary Time Earnings Context Help</p> <p>Context help has been updated on the Ordinary Time Earnings field of the Payroll Codes – Payments parameter to indicate it is used for calculation of Super Guarantee Contributions and Accrual of Leave.</p>	62629
<p>Print Earnings Detail Report</p> <p>A new module called ‘Print Earnings Detail Report by Company’ has been added to Main Menu ➔ Payroll and Personnel ➔ Reporting and allows users to report on audited Earnings History for a nominated Pay Date range. The Earnings Detail report can be used to reconcile the STP Reconciliation by grouping via Reporting Category and provide earnings detail for Payroll Tax reporting.</p>	62674
<p>STP Phase 2 - Print Pay Details</p> <p>Print Pay Details module now includes the following columns:</p> <ul style="list-style-type: none"> ❖ ATO Reporting Code ❖ ATO Reporting Sub Code 	62921
<p>Enabling 2FA in Payroll Processing</p> <p>In certain circumstances an exception error could occur when enabling 2FA in the Payroll Processing options. This has now been corrected.</p>	62705
<p>Duplicate Employee number causes Exception</p> <p>Improved error handling where user creates an employee with employee number that already exists.</p>	62905
<p>File Check Employee Earnings Payroll Integrity Module</p> <p>When running the Payroll Integrity module ‘File Check Employee Earnings’ the values gathered from earnings history only include audited records when run from the following locations:</p> <ol style="list-style-type: none"> 1. Main Menu ➔ System Maintenance ➔ Integrity ➔ Payroll - File Check Employee Earnings 2. End of Day Run 	62941

<p>STP Phase 2 Report cannot be sent for Previous Year</p> <p>Where the STP Pay Service has switched from the 2018 to 2020, users are unable to send an Update Event for the Previous Year from STP Reconciliation Report in the switchover year.</p>	63085
<p>Upper Limit on Sliding Session Timeout for Payroll Access</p> <p>To comply with ATO security requirements, the payroll sliding session timeout parameter has an upper limit of 30 minutes.</p> <p>On upgrade, if the value set in the sliding session timeout parameter is greater than 30 minutes, it will be reduced to 30 minutes. (Parameters → Set Parameters → Payroll → Processing Options → Session Timeout - Sliding)</p>	60233
<p>Security Audit Logs Retained for 12 Months</p> <p>In order to comply with ATO/STP requirements, the length of time security audit logs are retained has increased from 60 days to 12 months. When running End Of Day processes, entries greater than 12 months will be removed.</p> <ul style="list-style-type: none"> ❖ Security → Analyse User Logins ❖ Security → Show Payroll Logins 	60234
<p>Leave Balance Table updated on WP Form for Casual Employees</p> <p>Corrected an issue where leave balances were being reported incorrectly on the payslip of casual employees where the Leave Balance table was used.</p>	60273
<p>New Context Menu Options to Add Allowance or Deduction to Employee record</p> <p>The following context menu options have been made available in Employee Details → Deduction/Allowances tab</p> <ol style="list-style-type: none"> 1. Add Allowance to add an allowance to an Employee for Payroll 2. Add Deduction to add a deduction to an Employee for Payroll <p>Allowances and Deductions can be modified using the Modify context menu option.</p>	61906
<p>Records Management</p>	
<p>Standard Clause not retained in Floating File Note Precis</p> <p>Corrected an issue where Standard Clauses were not being retained in the Floating File Note precis field.</p>	58712
<p>Update TIF icon on Folios Grid</p> <p>TIF files have been allocated an Attachment Icon of 'Image' on Folios grid to enable easy identification.</p>	58713

Forms xml file now includes Template Variables

59955

When exporting an xml file for Forms from Forms grid > Dump context menu option, the forms template variables (Set Templates) are now included.

Brackets included in Whitelisted Characters

60532

The set of characters whitelisted for folios, forms and templates now includes open and close brackets () in addition to the existing whitelist which includes the following: A-Z a-z 0-9 - _ . space.

Validation will check whitelisted characters in the following areas:

1. Folio File Name and Attachment Options including on ad hoc basis from Export / Print of Folios.
2. WP Form - Set Template
 - a. Folio Templates - Folio Precis and
 - b. Folio Templates - Override File Name
 - c. Email Templates - Attachment File Name
3. Folio Override File Name

Validation message has been updated to the following, "Invalid characters exist in the description. You can only use the following characters A-Z a-z 0-9 - _ . () space".

Information Type cannot be amended in Floating File Note

60534

Corrected an issue where an amended Information Type in Floating File Note was not being saved to the folio record.

Increase Client Name output in Trust Reports

60876

The character limit for the Client Name field in WP Form TTB Trust Trial Balance Table 1 - Matters Field 2, has been increased to 100 characters.

The character limit for the Client Name field in Publish Trust Ledger, List Trust Ledger, Print Trust Ledger, and Print Trust Ledger by Matter, has been increased to 100 characters.

Windows 11 22H2 limits Windows Explorer view to Desktop only

62718

Corrected an issue for Windows 11 machines where Browse for Folder option only displayed the desktop / folders or the desktop / shortcuts on the desktop on Export Folio from LawMaster.

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System Administration

Upgrade NuGet Package - CSVHelper

53354

Upgrade CSV Helper NuGet package to latest version.

Move implementation of the following uploads to PracticeManagement Client:

1. System Maintenance → Data Migration Tools → Import Matter Attributes
2. Accounting → General Ledgers → Journals → Import GL Journals with GST

Where Windows Authentication fails Invalid Token is not saved

60139

Azure SSO Token is currently saved to following location - C:\Users\\AppData\Roaming\LawMaster\PracticeManagement\pm.msacache.bin3.

If the Azure Account is incorrect and on first login by user the login fails and user receives the following message "Login Failure - Invalid Azure/Windows Token" the token will not be saved.

Update Security Type S Label

61722

Security Type S has been renamed "Newsletter Subscription" from Menu bar → Security → Run Audit Trail for All Security Records.

Improved Deletion of Security Information

62077

When restoring a Production database into a Development or Training environment, security information is reset for all users. Issues around the deletion of 2FA secrets could cause an error preventing this process from completing. This has now been corrected.

Auto-run Program from Favourites

62172

Resolved an error, "Sequence contains no matching elements" displayed to users, when a Program was set to auto-run in Favourites.

User Defined Queries

UDQ Allowed Objects

60513

To restrict potential abuses of User Defined Queries (UDQ), the ability to lock down access to high-risk tables, views and stored procedures from queries has been provided.

60483

A new parameter called 'UDQ Allowed Objects' has been added to Menubar → Parameters → Set Parameters → Miscellaneous which provides a checklist of all allowed Tables, Views, and Stored Procedures. A default set of objects have been selected for restricted users; we recommend you review the list following upgrade.

Changes to the list can be viewed from View Audit Trail for All Parameters.

A user without elevated privileges cannot execute a stored procedure or use a Table or View that is restricted i.e., not checked on 'UDQ Allowed Objects' parameter. A user with elevated privileges has no restrictions.

Restrict Access to User Defined Queries from User Security

60485

A new tick box labelled 'Elevated UDQ Permissions' has been added to the Additional Permissions area of the Other tab under Maintain User Security which if ticked, provides unrestricted access to all tables, views, and stored procedures via User Defined Queries.

60486

On upgrade, this field will be unticked for all users except PROADM. If you have users that require access to the records on all tables and stored procedures, we recommend you select the 'Elevated UDQ Permissions' option.

A user without elevated privileges cannot:

1. View restricted tables in the View Table list (Add/Modify UDQ → Display Table)
2. Access data from a table or view that is restricted (Add/Modify UDQ)
3. Execute a stored procedure that is restricted (Add/Modify UDQ → Test Query)

A user with elevated privileges has no restrictions.

List Dictionary module respects UDQ Whitelist Security Model

60515

A user with Elevated UDQ access rights will see all relevant tables and views from List Dictionary.

A user without Elevated UDQ access rights will NOT see tables and views from List Dictionary unless they are in the allowed (white) list.

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Ad-hoc queries restricted based on Security Settings

60607

A user without Elevated UDQ Permissions cannot do the following from UDQ →

Run Ad-hoc Queries:

1. Access data from a table or view that is restricted
2. Execute a stored procedure that is restricted
3. A user with elevated privileges has no restrictions

Workflow Development

RUN Statement

61361

Corrected an issue where the RUN Statement was not executed correctly in Cuba.

New Softdocs Licence Codes available

62146

The following Softdocs modules can now be licenced in LawMaster:

1. 068 Domestic Violence
2. 069 Leasing (Qld)
3. 072 Personal Injury (WA)
4. 073 Personal Injury (VIC)

Updated descriptions for Modules / Areas of Law have been applied for the following:

1. 054 Employment
2. 059 Trusts

Users on versions earlier than Cuba R2 can have a script applied to make the new modules available for licencing.

Testing

We recommend you undertake testing of the release in your training database before installing to Production. We suggest you adopt, as a minimum, the following testing protocol:

- ❖ Review the release notes and identify the items that may have an impact on your business processes;
- ❖ If you are unsure about any aspect of the release, contact Help Desk for clarification;
- ❖ Download the release and install into the training database;
- ❖ Test the requests that may have an impact on your business processes and satisfy yourself they do not have any adverse impact on your business processes;
- ❖ Inform your users of any changes;
- ❖ Install the release to your Production Database.

Version Control

Version No.	Date of Release/Update	Summary of Changes
10.15.814	01/02/2023	Publish Release Notes
	03/07/2023	Updated Known Issues for Import GL Journals with GST and Import Charge Rates