



Software Release Notes

SOS Connect & SOS Accounts

V4.18.17 & V5.18.17

Revision 11329

14th December 2021

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Introduction

The purpose of this document is to summarise the changes in the release of SOS Connect and SOS Accounts V4.18.17 & V5.18.17 revision 11329. It is aimed at those clients who are considering upgrading to this version, but is also an important resource of information for anyone who will be installing, supporting or scripting in this version. This summary document contains the following information:

- Critical bulletins relating to this release
- Important changes to compatibility, pre-requisites or configuration
- Changes to access rights, existing software features, scripting cards or standard scripts
- Details of software enhancements available in this release
- A bug fix catalogue for the fixes made in this release

Separate documents are supplied detailing the pre-requisites, compatibility and configuration of an SOS system. Where appropriate, separate documents are provided containing details of the major enhancements. All documents relating to this release should be read before installing the new version of SOS software on any environment.

Key features in this release

A change has been made to the Print Legal Aid Claims Screen in this release to allow the user to enter the percentage rate for costs incurred for the LA Claims Due Report. Full details on this change can be found later on in these release notes under ticket number 16690.

Installation of release files

SOS will normally insist that any new software release is installed on a customer's own test environment first, so that the customer can complete their own final acceptance testing before the new version is installed on to a live environment. Particular attention should be paid to the changes highlighted in this main document and related documents for this release. Once you have confirmed to SOS Support that your testing has been completed to your satisfaction, a time slot will need to be booked for the upgrade of your live system. Note that users will not be able to use the live system during the live upgrade.

Functionally, versions V4.18.17 & V5.18.17 are identical. The difference between the two versions is that they are built to run on different versions of the Progress OpenEdge infrastructure. The following explains the infrastructure requirements for each version:

SOS Software Version	Recommended Progress OpenEdge infrastructure	Other infrastructures certified to be compatible
4.17.24 and above	OpenEdge 10.2B SP8	OpenEdge 10.2B SP7
5.17.24 and above	OpenEdge 11.7 SP5	OpenEdge 11.3 SP1 OpenEdge 11.5 SP1 OpenEdge 11.6 SP4 OpenEdge 11.7 SP4 to SP10

These Progress OpenEdge infrastructure requirements apply to both server and client machines.

In each software release, Progress object code is supplied in 4 packs: 4.18 32bit, 4.18 64bit, 5.18 32bit and 5.18 64bit. None of these object code sets is interchangeable. The correct set of object code must be applied to the SOS AppServer for the version required, based on the Progress OpenEdge infrastructure installed on the server. Only the 32bit versions can be used on client machines to run SOS Accounts.

SOS Connect client-side object code is supplied in 4 packs: 4.18 32bit, 4.18 64bit, 5.18 32bit and 5.18 64bit. The pack with the correct version number must be installed for SOS Connect client PCs, and the "bit-ness" (32bit/64bit) should be selected to match the bit-ness of the Microsoft Office installation on the client machine. This will ensure better client-side integration with Microsoft Office.

Updated components in this release

The following components and services have been updated in this release:

Component	Changed in this release (requires installation update)
SOS Connect	YES
SOS Accounts (Practice Manager)	YES
Database view definitions	YES
Server-side email filing service	NO
Word Addin	NO
Outlook Addin	NO
Document attach service	NO
IManage integration	YES
Infotrack integration service	NO
SOS Connect customization	NO
Crystal Reports layouts	NO
Data Dictionary (HTML catalogue)	NO
SOS Connect Scripts	NO
EFT payment templates	YES

Changes to pre-requisites, compatibility and configuration

There are no changes to pre-requisites, compatibility or configuration in this release. For full details of pre-requisites, compatibility and configuration please refer to the accompanying document.

Version numbering

The final 5-digit revision number at the end of the full version numbers for this release (11329) is lower than the previous release. This is due to an internal development infrastructure change, specifically caused by the SOS development team switching to a different source code library system. The fact that this final number is lower than last time will have no impact on the software.

In future releases the final 5-digit revision number will revert to being a higher number each time.

BREAKING CHANGES

Changes to SOS scripts, existing software features and user access rights are described below.

As normal, developers who are directly integrating to SOS API services should update their Proxy DLL references to the correct DLL file version when connecting to SOS systems running this latest patch update.

Changes to existing software features

There are no significant changes to existing software features in this release.

Changes to SOS Scripts

There are no changes to the SOS scripts in this release.

Changes to SOS Crystal Reports

There is a change to the LAA Claims Due Report in this release. Full details of this change can be found further on in these release notes under ticket number 16690.

Changes for API Integrators

There are no changes for API Integrators in this release.

Changes to User Access Rights

There are no changes to user access rights in this release.

Summary of bug fixes & minor changes

This release contains a number of fixes and minor changes in both SOS Accounts and SOS Connect covering a variety of software areas. Full details of the fixes and minor changes are provided at the end of this document.

Updates in this release

New and improved features in this release are detailed below. The numbers in brackets after the headings are the internal SOS development ticket numbers that were used to track the software changes.

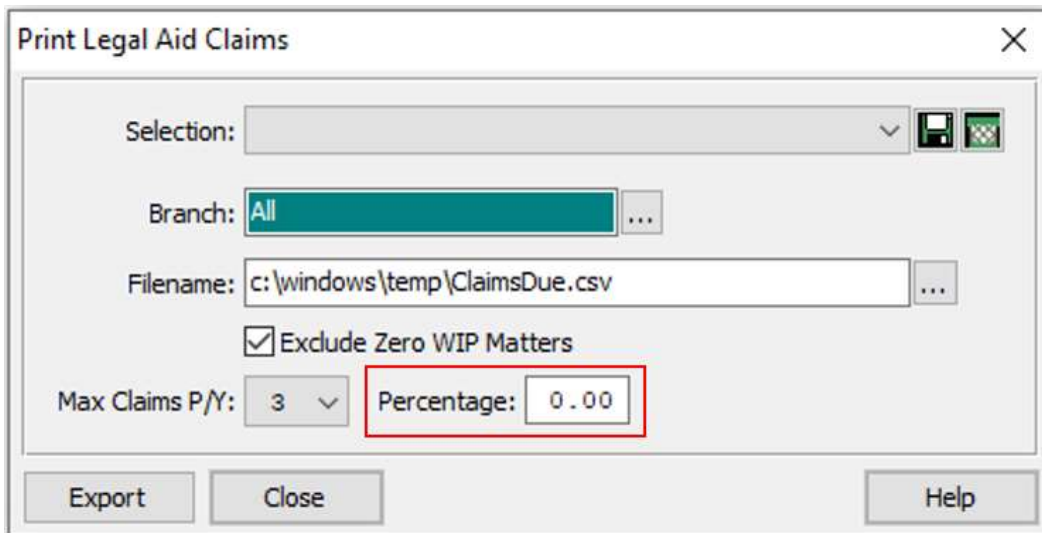
Changes to SOS Accounts

LAA claims due report - bug in calculation of LA Claims due (and change rate to 80%) (16690)

The Print Legal Aid Claims Screen has been amended to allow the user to enter the percentage rate for costs incurred for the LA Claims Due Report. This amendment enables the customer to update percentage costs when the rate is changed. This implementation thus avoids a new release when the rate is updated by the governing body.

The central government rules regarding the percentage level are explained here: <https://www.gov.uk/guidance/coronavirus-covid-19-processing-and-payments#payments-on-account-in-civil-cases>

At time of printing the costs incurred to date was 80%, however, this may alter in time and it is up to the organisation to make sure that they insert the correct data. Below shows the new screen which can be located from: **Reports > LA Reports > Claims Due**



Resolved Issues & Minor Changes

SOS Accounts

Software Area	Description	Ticket No(s)
Billing in Multiple Matters for the Same Client	<p>An update has been made in this release to deal with an issue which was found when billing across multiple matters against the same client record in SOS Accounts. Doing so could result in record locking errors being encountered such as the ones shown below: -</p> <p>! Unable to update previously selected recipient.</p> <p>BILL-RECIPIENT in use byWait or choose CANCEL to stop [2624]</p> <p>This issue has been resolved by forcing an alternative index on find of Bill-Recipient record to prevent record locking conflicts being encountered in the software.</p>	16693, 16702, 16740
New EFT electronic payment format	<p>A new EFT electronic payment output format has been included in this release for Ulster Bankline Standard Domestic Payments. This output format definition is supplied in the <code>lsosobjectPaymentsFileTransform</code> folder and is called MasterUlsterBanklineSDP.xslt</p>	16802
Alt+P Keyboard Shortcut for "Post" option in Nominal Detail Enquiry screen	<p>In release versions 4.18.12 and 5.18.12 a new Nominal Detail Enquiry screen was introduced. The Alt+P keyboard shortcut which was previously available to bring up the "Post" window in this screen was removed. This same Alt+P keyboard shortcut has now been reinstated in this release and is once again available in the Nominal Detail Enquiry screen within SOS Accounts.</p>	16360, 16513, 16729, 16737, 16749
x.18.16 Upgrade Issue re. SOS Data Warehouse (Analysis DB) Build Process	<p>In the release of 4.18.16 and 5.18.16, certain errors could potentially occur when the SOS Data Warehouse (Analysis DB) build process was run. This issue has now been resolved.</p> <p>In addition to the Analysis DB build process, the following were also affected and have therefore also been updated: -</p> <ul style="list-style-type: none"> • KPI Build • Client Bank Account Import • New Bill Data Viewer • New Credit Data Viewer • Period End batch rollover • Report Spooler start and stop <p>The above items have been updated with references to SOS Accounts static class removed from "Start-Up" procedures as the class is not available at start-up due to the fact that on initialisation, the Propath is not set.</p>	16785
Chart of Accounts Screen Label	<p>As part of the updating of application screens for future compatibility with OpenEdge12 made to SOS Accounts in the release of 4.18.16 and 5.18.16, the Chart of Accounts screen was incorrectly labelled as "ChartPL". This has now been corrected and is once again labelled "Chart of Account".</p>	16765

Software Area	Description	Ticket No(s)
SOS Accounts Ledger – MAT-BILL-HIS-SUMMARY, potential summing error	<p>An issue lies with the MAT-BILL-HIST view which also affects the MAT-BILL-HIST-SUMMARY view as it references MAT-BILL-HIST to get its data. When a credit-note is posted which results in an auto-allocation to another bill line (because the line being credited is fully satisfied but other unsatisfied lines exist), if any part of the credited value goes into unallocated credit then an X06 entry is created in the credit-note transaction. The MAT-BILL-HIST view was incorrectly picking up X06 entries and including them in the “values” calculations of the credit-note transaction resulting in incorrect results for credited lines.</p> <p>Additional criteria has been added to the MAT-BILL-HIST view so that the X06 entries are excluded which also results in the correction of the results returned by the MAT-BILL-HIST-SUMMARY view.</p>	16767
Balance loading issues - unable to undo BF bills and bill payments	<p>An issue with Brought Forward Bills created via Balance Loading has been resolved. Brought Forward Bills created via Balance Loading will now have a second entry created for the corresponding OR posting where the bill is either part or fully paid so that it adheres to the normal structure and therefore prevents errors when viewing from the matter accounts ledger.</p> <p>A change has been made to the lookup of Bill-Header when undoing ORs related to Balance Loaded Brought Forward Bills to prevent error message re record not found.</p>	16778

SOS Connect

Software Area	Description	Ticket No(s)
User-names with Spaces	A change has been made in this release to ensure that if an SOS Connect user has a space in their user ID (for example J Smith (and not JSmith or J.Smith etc)), when exiting SOS Connect and selecting "Check-in local documents", the document check-in process completes correctly and does not in fact leave a document checked out in error.	16703
iManage Integration	<p>An issue with the scripting card iManageUpdateWorkspace has been resolved in this release. This scripting card is used to update the profiling information stored against an existing iManage workspace, for example to update various metadata values held against the workspace when matter-level data is modified in Connect. In previous versions, this scripting card would try to update the profiling information for all sub-folders within the workspace, including special types of internal sub-folders which should be omitted, such as saved searches. In this scenario the following error would be displayed:</p> <p>Error on leaving card. Error communicating with iManage.</p> <p>... "function": "getFolderChildrenInternal", "code": "NRC_NO_RECORD", "code_message": "No record found" ...</p> <p>This problem has now been resolved.</p>	16760

SOS Reports

Software Area	Description	Ticket No(s)
LAA Claims Due Report	The calculation for the formula for Due Reports was found to be incorrect in 5.18.14. This has now been corrected. It should be noted that the user will now be able to enter the percentage of Claims Due in line with the Central Government rules regarding the percentage level. Which can be found in https://www.gov.uk/guidance/coronavirus-covid-19-processing-and-payments#payments-on-account-in-civil-cases	16690
Cost Paid Report	The standard SOS Accounts - Cost Paid Report, was showing a discrepancy for a full credit note if it had previously been written off (WB posting) against a bill. The issue occurred because the cost paid reporting logic was not excluding the WB entries which were posted against bills when they were then after fully credit noted. It was the cost paid logic that required a fix. This is now working as expected.	16777