

Cuba Quick Reference Guide

This Quick Reference Guide includes a summary of enhancements and a checklist of the tasks to be completed pre and post your upgrade to Cuba. Complete the Pre-Upgrade Tasks first, perform the upgrade to Cuba and then complete the Post-Upgrade Tasks to ensure your firm receives full benefit from the new enhancements and features listed below.

For a more detailed explanation of each step, see the [Cuba Release Notes](#). If you require further assistance to set up any of these tasks, please contact the LawMaster Helpdesk through the online portal.

Pre-Upgrade Tasks

- 1 [Upgrade Advanced Search](#)
 If upgrading a database 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. 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.
- 2 [Check-In Folios](#)
 We recommend all folios are checked-in prior to upgrading to Cuba if coming from a version earlier than Portugal R2.

Post-Upgrade Tasks

- 1 [Payroll Classification Code](#)
 Following upgrade to Cuba, system administrators should review the Payroll Classification Codes to ensure all Employment Basis codes have been mapped.
- 2 [Update WP Form Payroll Advice to docx file format](#)
 Update WP Form PPA to .docx format
- 3 [Update WP Form Print Employee Details](#)
 Update Static Field 12 and 64 on WP Form PPR (or download new sample form)
- 4 [Update WP Form System Control Report](#)
 Add new Table 2 Fields 7, 8, 9 and 10 on WP Form SYS (or download new sample form)

New Enhancements		
1	<p>New User Interface</p> <p>The LawMaster User Interface has been re-designed to provide a fresher more modern look and feel. Changes made to the User Interface include:</p> <ul style="list-style-type: none"> • Menu Bar options have been converted to a ribbon style menu. Users can switch between the collapsed Simplified or expanded Classic state or minimise the ribbon if required. • Main Menu has been converted to Accordion Control with hamburger button to expand or collapse the menu. Embedded search panel allows the user to quickly locate a menu option. • Alerts are displayed to the left of the screen with the Main Menu. Badge displays the number of alerts that have new items to be addressed. • Matter UI has been enhanced with the following improvements: <ul style="list-style-type: none"> ○ Matter Menu and Matter Toolbar have been incorporated in one menu to the left of the Lawyer’s Workbench area with a hamburger button to expand or collapse the menu. ○ The File Note area has been increased and now has the ability to change the text size for easier reading using Zoom In and Zoom Out icons. ○ Time Details, Disbursement Details and Action Event are now able to be collapsed or expanded. ○ Matter Summary is now included as a Collapsible Side Bar to the right of the Matter window. Users can pin Matter Summary in expanded or collapsed mode and setting is retained in user’s config file. • Restored matters and favourites set to auto run now use deferred loading on application start-up resulting in improved loading speed. 	<input type="checkbox"/>
2	<p>Omni Search</p> <p>A new search control has been added to LawMaster that allows users to perform searches across multiple categories at the same time. Omni Search category results will be limited by program access of the logged in user.</p> <ul style="list-style-type: none"> • Omni Search can be accessed from within LawMaster by selecting Ctrl+F or clicking on Search LawMaster button in the Menu bar. • A search can be limited to a specific category by entering a prefix before the search term as follows: Matters m-, Folios f-, Entities c-, Document Templates t-, Deeds d-, Library Catalogue l-, Programs p-. • A user can open a matter directly from Omni Search by entering a number and selecting enter in the Omni Search field. • On completion of search or the search status changed, if user is on another screen, the Omni Search tab takes focus. • Omni Search can be cancelled by either selecting the Cancel Search button to the right of the input field or Esc key. 	<input type="checkbox"/>

3 Payroll



To support STP Phase 2 processing in the next Release, a number of changes have been made to the Payroll module in Cuba including:

- New Cessation Type field has been added to the Employee record and Terminate button.
- New Employment Basis codes have been added to the Payroll Classification Code parameter.
- Tax Offset field combines the values previously stored in the Zone Allowance and Family Tax Benefit fields. WP Form PPR Print Employee Details has been updated to incorporate changes to these fields.
- Pay Period From and Pay Period To columns have been added to the Review Timesheets grid.
- Cumulative Earnings Summary Report can now be reported for Previous Year.
- On Modify Timesheet, Override Tax and Tax amount fields can now be modified without having to select Modify Header.
- End of Day process now includes Payroll Integrity check and WP Form SYS System Control Report includes new Earnings fields.
- The Print Pay Advices module has been moved to below Audit Payroll Transactions in the Main Menu and WP Form PPA Payroll Advice has been upgraded to Open XML format.
- STP modules Submit STP Update and Submit EOY Finalisation Declaration to the ATO have been removed from the Main Menu. Users can still access these modules from STP Reconciliation.

4 Other Updates and Improvements



- Workflow performance improvements
- 64 bit Integration
- Single Sign On (SSO) accomplished through the use of Azure Active Directory authentication
- Improvements to Outlook Integration when connecting to Matters
- Auto Check-In of Outlook MSG files
- Increased security around connections between LawMaster components and web applications
- Blacklist of file types introduced to restrict upload of potentially malicious files.
- Saving Attachments message when saving multiple email messages can be disabled
- User can choose to sync Bring-ups/Tasks using Bring-ups timer
- Timeout for Convert to PDF options
- LawMaster supports file format extensions up to 5 characters
- New module 'Remove Spaces from Entity Name' added to Main Menu
- Blacklisted file types within Elasticsearch will be re-indexed and precis able to be queried

Post-Upgrade Tasks Set-Up Guide

1. Payroll Classification Code

Existing Payroll Classification Code parameters (Parameters → Payroll) will be mapped to a new Employment Basis Code by first character of the Classification Code field as follows:

F* = Full time

P* = Part time

C* = Casual

T* = blank

Other = blank

Following upgrade to Cuba, system administrators should review the Payroll Classification Codes

→ Employment Basis Code field to ensure all codes have been mapped correctly.

2. Update WP Form Payroll Advice to docx file format

The WP form PPA has been migrated to Open XML standard and therefore only support the docx file type. If your WP Forms are of the doc file type, you need to update your forms as follows:

- a. Change the Form file to docx: Main Menu → System Maintenance → Forms → Form Enquiry → Select the form → Context Menu → Modify → Form File Name, select Unlock → Change the document type from .doc to .docx.
- b. Change the Document file type from .doc to .docx and upload the new document to Forms via Main Menu → System Maintenance → Forms → Select the form → Context Menu → Modify → Document Upload.

3. Updated Static Fields for Print Employee Details

Static Field 12 'Dependent Allowance' has been removed from WP Form PPR Print Employee Details while Static Field 64 has been renamed 'Tax Offset'. A new sample WP Form PPR is available for download from the Practice Management Sample Forms collection in the Client Service Centre. Upload the new document to Forms via Main Menu → System Maintenance → Forms → Select the form → Context Menu → Modify → Document Upload.

4. New Table Fields for System Control Report

WP Form SYS System Control Report now includes Table 2 Earnings Fields 7, 8, 9 and 10. To use the new Earnings fields, Table 2 on the WP Form SYS needs to be updated with T2_7, T2_8, T2_9 and T2_10 using the Forms Workbench → Insert option. Alternatively, a new sample WP Form SYS is available for download from the Practice Management Sample Forms collection in the Client Service Centre. Upload the new document to Forms via Main Menu → System Maintenance → Forms → Select the form → Context Menu → Modify → Document Upload.