Modification as at release 11.00.04
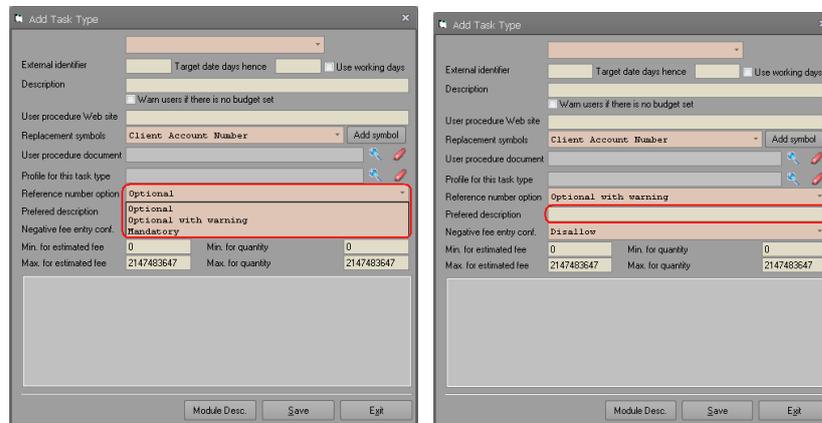
1) Added ability to enforce reference number for task types. This should allow sites that require mandatory task reference numbers to implement this. There are three possible choices for reference numbers, optional, optional with warning and mandatory. The default for this version is set to optional to preserve exiting behaviour. This setting will be checked within the task edit form as well as during the approval. A description can be stored to describe the data that a site is storing in this field. Please note that description can only be entered when the reference number is optional with warning or mandatory.

   This feature has been added to our Software Development Kit library as well. As a result, a new event will be raised from the workflow class object for processing this requirement.

2) Added ability to enforce reference number for matter types. This should allow sites that require mandatory matter reference numbers to implement this. There are three possible choices for reference numbers, optional, optional with warning and mandatory. The default for this version is set to optional to preserve exiting behaviour. This setting will be checked within the matter edit form as well as during the approval. A description can be stored to describe the data that a site is storing in this field. Please note that description can only be entered when the reference number is optional with warning or mandatory.

   This feature has been added to our Software Development Kit library as well. As a result, a new event will be raised from the workflow class object for processing this requirement.
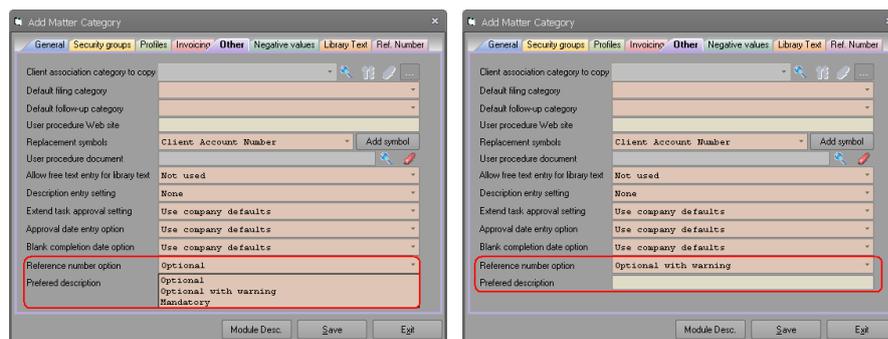
3) We have added ability to create and maintain disbursements, timesheet entries, time cost summary records, and invoices to our Software Development Kit library. The Software Development Kit test application has been amended to include demonstration of these features.

4) In our office and time costing system, actual time spent by a user on a specific task was stored in minutes. We have changed this and Synergy now stores the actual and estimated durations in seconds rather than minutes. All system reports have been amended to consider this change. However, if you have developed any reports based on the time cost tables "ZZTMECST" and "ZZTMESUM", please review these reports and consider the change in the time cost granularity.


5) In many cases, processes in our Software Development Kit library may require user input. The user inputs may be required in the middle of an operation. An example of such case is task approval process where the user may have to go through a number of steps before a task is approved. Given that our Software Development Kit library uses transactions, in cases where user input is required, these transactions may lock other users of the system including those using the Synergy application. To avoid these, we have allowed developers to indicate whether Software Development Kit should or should not use transaction processing. Please note that when creating workflows in cached mode, transactions will always be used as this is a bulk process. The two method calls, DisableTransactionProcessing and EnableTransactionProcessing allows developers to turn the transaction processing on and off. These methods can only called before the Connect method of the database class is invoked. After a call to Connect, calling these methods will generate an error and will not have any affect in transaction processing. TransactionProcessingDisabled and TransactionProcessingEnabled properties allow developers to check the status of the transaction handling within the current library session.

6)   In previous versions of the Software Development Kit library, when a temporary folder was passed, the library would automatically assume that the developer would be using the cached method for matter creation. Consequently, it will create the required temporary database during the Connect method call. However, a number of other new processes that we have added to the library may also require access to a temporary folder (e.g. document launching etc.). To avoid the unnecessary overheads of creating the temporary database for other cases where temporary folder is needed, the creation of temporary database is done when the first process requires it. This should be transparent to the developers and hence will not require any changes to the code. This release note is simply put here as information for all the developers using our Software Development Kit library.
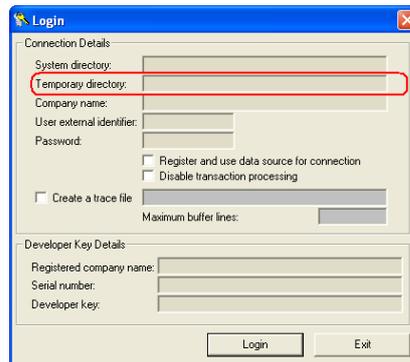
7)   In office and time costing reports, all time cost entries attached to host client are usually excluded implicitly or explicitly when requested. In some cases where a company is sold to a new owner, the host company will change. However, the time cost reports will not be right if the entries attached to the old host client is included in these reports. We are now keeping track of host client changes in a table and all entries in the host client table is now excluded from these reports implicitly or explicitly when requested. The only chance to remove a host client from the table is when administrators change the host client. Other than that, there is no other interface for manipulating this table. Please note that client list have been removed from actual fee time cost report.
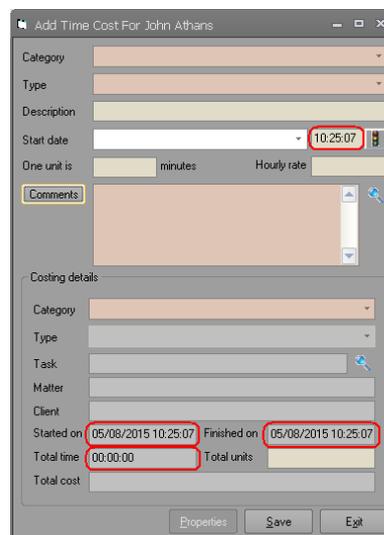
8) We have renamed the STSDKAdditionalDataReplacementTypes data type to STSDKReplacementTypes. All stSDKAdditionalDataReplacementType* values for this type is changed to stSDKReplacementType*. Please do a find and replace for these data types in your code. We have also renamed indirect appointment data type to stSDKReplacementTypeAppointment.

9) From this version onwards, we have decided to store our word template in the Synergy's system directory. Please remove these files from the application installation directory and ensure that you copy these files from the distribution media to your system directory during the upgrade process. In the next release, our installation package will no longer install these files.

10) We have fixed a bug in the other products form related to setting Elite as the tax product. It was not saving the SQL Server database details correctly.
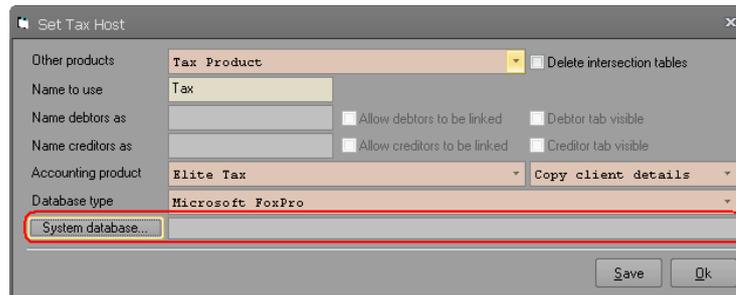

11) We have added ability to import non-master guidelines and proformas that are attached to all active master matters from the importation form. We have also added importation of GL mapping to this form. Please note that this feature is only available for ST Synergy staff from HK support tab.

Please note that features in support tab are strictly for use by ST Synergy Staff and is not for use by clients. Do not use any of the features in the support tab even in the unlikely event that you have miraculously worked out the support password.
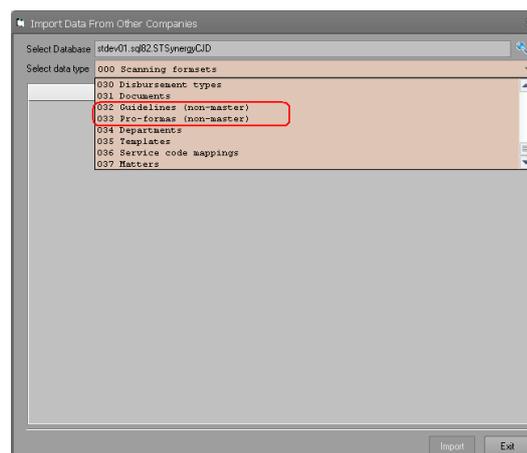

12) Users sometimes copy and paste client account numbers from other applications into Synergy. Depending on where the copy is done, some applications may append extra characters to the account number. For example, copying a cell from Excel can append carriage return and linefeed characters to the end of the account number. From this version, we are

removing carriage return, linefeed, tab characters from the account number fields in Synergy user interface. This change is done in most forms that accept client account numbers but not all. For example, the client edit forms use the account number as it is entered in the form. We will gradually work our way in including this change to all of the forms in the future versions.
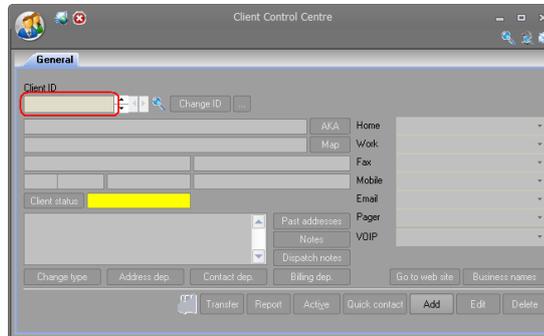

13)   When a site defaults the radio button to favourites matters, Synergy will display the favourite matters in master matter selection form by default. However, the user still have the option of clicking the other radio buttons and pick other master matters should s/he wish to. Some customers have requested whether these controls can be locked so that people do not create other types of matter by mistake. In this version of Synergy, we have introduced a new security group called "Security group for Master Matter Form" that allows sites to specify which users should be allowed to have full access to controls in the master matter selection form. Please note that this is just a security group for controlling the Synergy user interface and is not by any means controls who can/cannot create use certain master matter for matter creation. Consequently, our Software Development Kit does not implement this security group and can only inform whether the logged user is part of this security group. Please note if this security group is not set, everyone will have full access to the master matter selection controls.
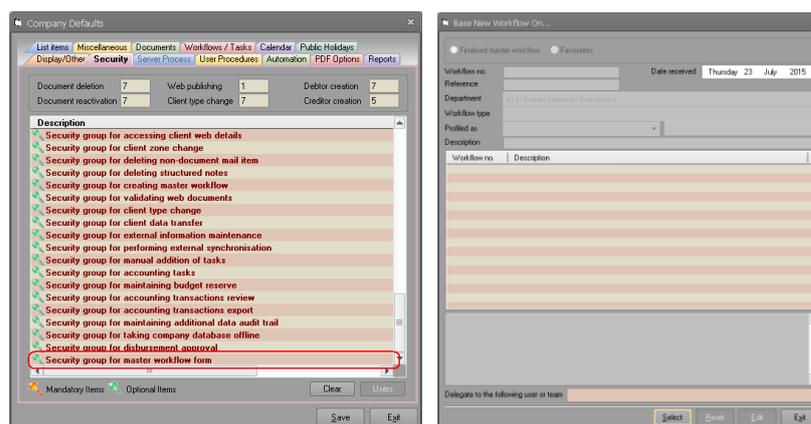

14)   Synergy allows users to set the sender of a message to a specific mail box. When this feature is turned on from the company defaults, everyone in the organisation can use this feature. Some customers have asked to have the ability to control who can specify the message sender to reduce possible errors. We have added a new security group to allow sites to specify who will

be presented with the sender drop down (from box) in the message edit form. The same security group is used for the email client feature.
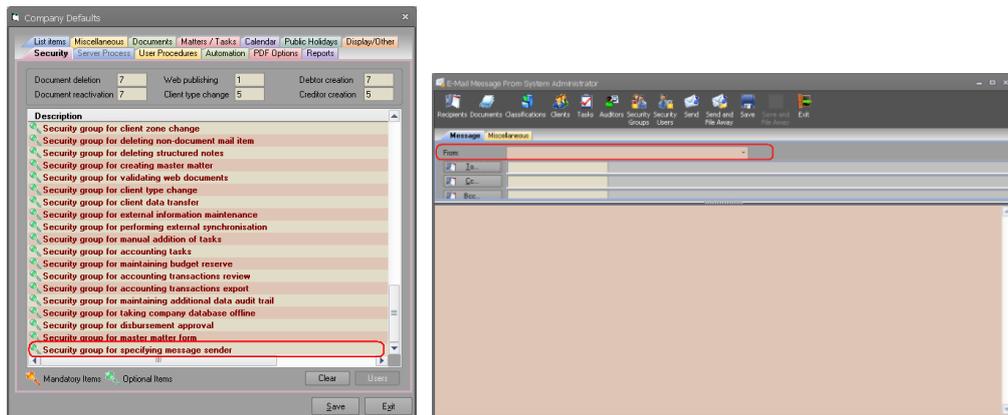

Email client forms have also been amended to ensure that only people within this security group can create and send emails with from email address. Please note that for this feature, message templates with sender email will only be listed in the template selection form if the user is within this security group.
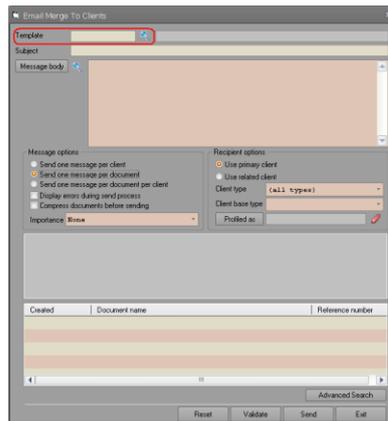
We have also amended email sending method to ensure that those that are not within this security group will not be able to send an email with sender specified. A new error message will be added to the error list if this is the reason for the send failure.

15) We have made the document control centre resizable. As you can see from the toolbars, just like any other resizable control centre, you can now detach and float this control centre outside of the Synergy application form.
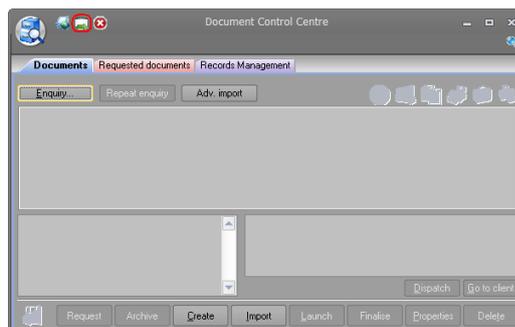
16) We have made all our control centres except the external client control centre floatable on multi-monitor screens. We have also added a new tool bar item to sink all the floated control centres back into the Synergy desktop with one click.


17) We have changed all our code to use explicit parameter passing methods rather than relying on VB's default parameter passing mechanism. Please note that as a result of this change, the signature for two methods in our Software Development Kit library have changed. These methods are both part of our clsSTSDKWorkflowItem class. The second parameters for these methods are now explicitly passed by reference. The two methods are:

SetWorkflowItemPrimaryClient
SetWorkflowItemPrimaryResponsibility

If you are using these methods, please ensure that you code is tested thoroughly before rolling out this version.

18) We have restructured the initialisation file structure of our Software Development Kit test application to more than one set of details to be stored. A new initialisation file section called "Company Profiles" has been added. Under this section, you can assign a profile description (usually name of the database environment that you will be connecting) using ProfileXXX where XXX is a 3 digit number between 001 and 100. Once the profiles have been defined, each section should carry XXX_ as the first 4 character of the section name where XXX is the relevant 3 digit profile number (e.g. 001_Connection Details etc). The test application will still be able to read old structured ini files. The list of company profiles will be listed in a drop down and users can select a profile to fill in the details.
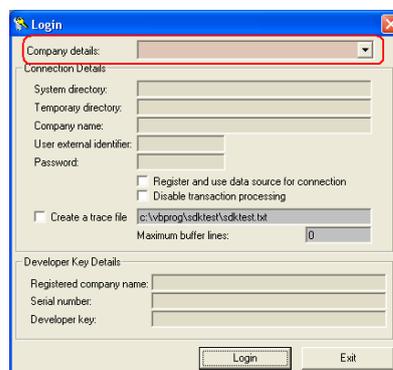

19) As you may have noticed, the map button on the Client Control Centre may not work in version 11.00.03 of Synergy. The issue seems to be that Google

has changed their API's and the way they accept parameters. We have changed the way Synergy loads Google maps and managed to work around these changes. We have added a new file called GMFile.sts to our system directory. Please copy this file along with everything else from in the SysDir folder of our distribution media.

20) When staff create an invoice in Synergy, the master invoice documents gets listed based on the name of the document. In most cases, the master invoice document relevant to a matter will be linked to the matter as pro-forma document. In these cases, depending on the number of master invoice documents, it could be hard to locate them between all other documents. We have changed Synergy and now showing all those linked documents to the matter at the top of the list. There is a new column in the list that displays which one of the documents are set up as pro-forma document for the matter that invoice is created from.

21) When auditing document server repositories, catalogued documents are ignored by the process. We have added a check box that allows administrators to include the catalogued documents in the audit report.
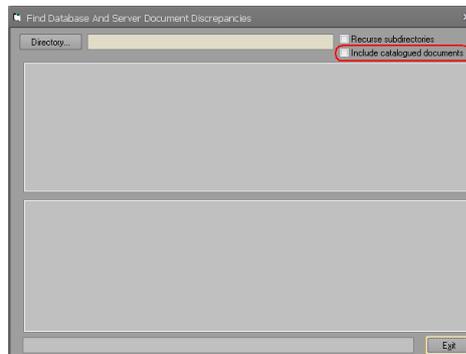

22) The "**Link**" button in the documents tab of the task edit form detaches the selected documents and links them to a task in another matter. We have changed the behaviour of this button to reflect the name. From this version onwards, the link button will link the selected documents to a task in another matter and will leave the document attached to edited task. We have added a new button called "**Transfer**" which will do exactly what link button used to do, that is move selected document from the edited task to a task on another matter.
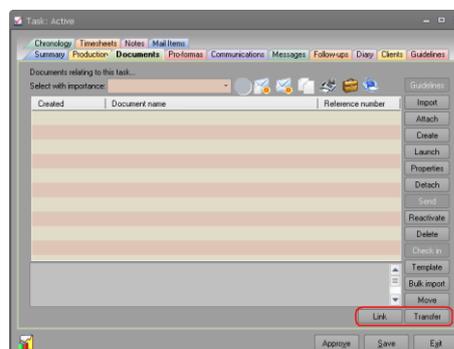

23) We have added a new popup menu option to allow users to select associates as related clients for an appointment. This will make it a lot easier to populate

the related clients list from associates of a primary client which was not trivial in previous versions.
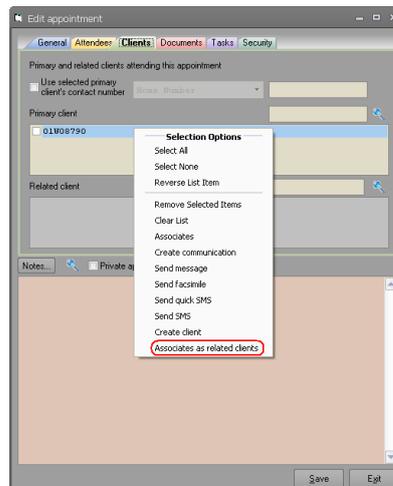
24) When using office and time cost system, the timesheet entry for a communication was only created when the communication was being added to the system. Thereafter, updating the date or times of the communication was not changing the corresponding timesheet entry leaving the two records out of sync. What this meant was that to get these consistent, you had to delete the old communication and recreate it with the correct date and time details which could be a lot of work to just get the timesheet entry right. In this version, we have changed this so that any change to date and/or time of communication is reflected on the corresponding timesheet entry provided that the timesheet entry is not approved and the user that is changing the date and time is the person that created the timesheet entry in the first place. No modification is applied to timesheet entry if it has been approved or someone else modifies the communication date and time.
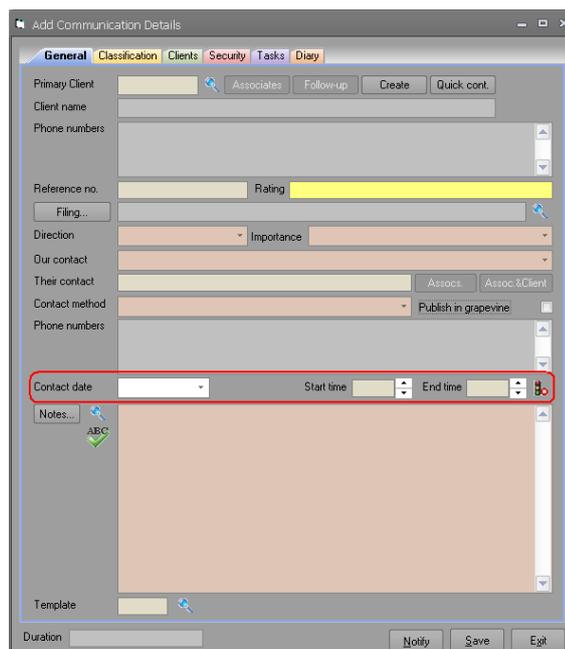
25)   The disbursement list box on time cost tab of the work centre was displaying some pop-up menu items under the incorrect menu item. This is fixed now.

26)   When capturing additional data, the defaults were not being applied if the additional data was partially captured. We have added a housekeeper setting that will allow all the uncaptured additional data columns display their default values both in add and edit mode. We have also added a setting to each additional data table definition that allows control of this setting at each additional data table level. You can turn on the housekeeping setting to use this for all additional data tables. Alternatively, leave housekeeping setting off and control this at each required additional data table level.
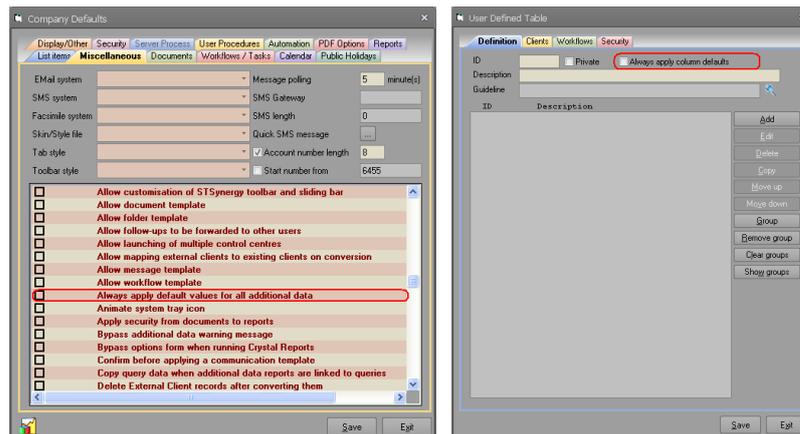
27)   Fixed a bug in replacement symbols and additional data fields where client information was extracted from the database. Synergy was not honouring the view security group from client type setting and was displaying any data that was requested. We have added a check to ensure that the user that is extracting data has access to the client information before extracting and returning them to the user.