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TeamConnect® Enterprise 4.0

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Release Notes

TeamConnect™ Enterprise 4.0 Release Notes

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NOTE: Throughout Mitrtech product publications, in addition to using full product names where necessary, we also use familiar and shorter terms to increase your ease of reading. You may find the following aliases for our product names:

TeamConnect for TeamConnect Enterprise
Matter Management for TeamConnect Legal Matter Management
TeamConnect Legal for TeamConnect Legal Matter Management
CSM for TeamConnect Collaborati Spend Management
Collaborati Spend Management for TeamConnect Collaborati Spend Management
SOP or SOP Manager for TeamConnect SOP Manager
Legal Hold for TeamConnect Legal Hold
Legal Reports for TeamConnect Legal Reports
Deadlines for TeamConnect Deadlines
AP Link for TeamConnect AP Link
Office Suite for TeamConnect Office Suite
Financial Management for TeamConnect Financial Management
Screen Designer for TeamConnect Screen Designer
Upgrade Toolkit for TeamConnect Upgrade Toolkit

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1 System Requirements

Before you begin to install TeamConnect 4.0, ensure that your system meets the requirements. For a full list of requirements, refer to the Installation Requirements in the *Installation Guide*.

2 TeamConnect 4.0 Enhancements

TeamConnect 4.0 includes the following enhancements. For specifics on these enhancements, refer to [New in TeamConnect](#) and [Changes in TeamConnect](#).

Workflow Process Enhancements

This enhancement includes updates to the **My Approvals**, **My Requests**, and **My Workflow** Processes pages and improvements to how a request moves through a workflow process:

- Users can reject multiple requests at the same time.
- Users can approve or request requests through an email.
- Search filter on many of the pages.
- Users can send requests to other users to approve before or after submitting an approval.
- Workflow process managers can reassign different types of requests to different users.
- Workflow process managers can review a list of failed actions for requests.
- Requests can move conditionally through workflow processes based on specifics of the request.

Search and Mass Update Enhancements

Users can now update editable fields for multiple records directly from the search results.

TeamConnect API Redesign

This version of TeamConnect includes an optimized and redesigned API. The new API classes replace all the previously existing classes and include service-level and model-level interfaces.

2.1 New in TeamConnect

This section contains specific information about new features and functions in TeamConnect 4.0.

Users

The following new features and functions are available for TeamConnect users.

Approvals

- **Requests to Approve** page
 - The **Action** column now includes an **Approve** button for each request.

- A **Reject** button appears under the **Requests to Approve** table, so that you can reject multiple requests at the same time, if the administrator allows batch rejection.
- A search filter now appears on the following pages:
 - **Requests to Approve** page of **My Approvals**
 - **Active Requests** page of **My Requests**
 - **Attention Required** page of **My Workflow Processes**
 - **In Progress** page of **My Workflow Processes**
- The **Default** field for record types now appears on the **Requests to Approve** page of **My Approvals**.
- The following additional fields appear when all requests are invoices:
 - Vendor
 - Invoice Date
 - Invoice Total
 - Project
- Users can now approve requests through email. See *Approving or Rejecting through Email* for more information.
- The new **Send for Approval** button now appears on a record in a workflow process if the system administrator allows approvers to send the request to other users prior to approving. See *Approving or Rejecting Within Records* for more information.
- The new **Add a new approver after approval** field now appears on the **Confirm Approval** popup if the system administrator allows approvers to send the request to other users after approving. See *Approving or Rejecting Within Records* for more information.

Email Preferences

If the administrator enables approvers receiving reminders prior to expiration, up to three fields with the follow text appear on the **Email Notifications** page: **Email me x day(s) prior to expiration**. By default, these fields do not have checkmarks.

Search

The custom search results screen now has a **Mass Edit** button, which allows users to update editable fields for multiple records directly from the search results. See *Editing Multiple Records* for more information.

Search Views

Search views for custom fields, involved, assignees, and related objects were changed. If a user has view rights to a custom field, involved, assignee, or related object, but lacks the view rights for custom fields on an involved, assignee, or custom field, "SECURED" will display in the object's place within the search view.

Workflow Processes

- The **Failed Actions** page now appears under the **Workflow Processes** pages. See Returning Requests with Failed Actions to Workflow for more information.
- The **Reassignment** page now appears under the **Workflow Processes** pages. See Reassigning All Requests for a User for more information.
- From the **Attention Required** or **In Progress** pages, the **Restart Request** popup that appears when you click the **Restart** button now includes a new **Start with last approver(s)** check-box. See Returning Requests with Errors to Workflow for more information.

Administrators

The following new features and functions are available for TeamConnect administrators.

Approval Settings

The new **Approvals** page of **Admin Settings** is for controlling the settings for the **My Approvals** pages. See Approval Settings for more information.

Invoice Settings

The **Invoices** page includes a new **Require In House Comments upon adjustment** check-box. See Invoice Settings for more information.

Email Settings

The **Email** page includes a new **Incoming Mail Server Settings** block. See Setting Up Email for more information.

Notification Settings

- The **Notifications** page of **Admin Settings** includes the following new system notification actions. See Customizing System Notifications for more information.
 - **Workflow expiration notice**
 - **Workflow review completion notice**
- The **Email** page of a notification template includes the following new fields under **Approvals** in the **Object Navigator**. See Notification Settings for more information.
 - **Request Name**
 - **Requested By**
 - **Requested On**
 - **Approval Object**
 - **Reviewed By**
 - **Reviewed On**

- **Review Comments**

Rights

System Rights page—The following new permissions now appear under **User Rights**:

- **Mass edit all records**

The following new permissions now appear under **Object Definitions**:

- **View Object Definition conditions**
- **Edit Object Definition conditions**
- **Create Object Definition conditions**
- **Delete Object Definition conditions**

See Object Definition Rights for more information.

Designers

The following new features and functions are available for TeamConnect designers.

Conditions

The **Conditions** tab is new to all system and custom object definitions. See Conditional Expressions for more information.

Search Views

- The **Search Views** tab now includes the new **Use this search view for workflow processes** field. See Accessing the Search View Screen for more information.
- **Filter Display** and **Results Display** tabs—For system and custom object definitions, the **System** field drop-down list includes the following new options:
 - **Workflow Current Approver**
 - **Workflow Last Performer**
 - **Workflow Has Multiple Approvers**

Invoices

The **Search Views** tab includes the new **Approvals** search view. See Accessing the Search View Screen for more information.

Notifications

The **Notifications** tab of system and custom objects includes the following new fields. See Customizing Notifications for Object Definitions for more information.

- **Workflow expiration notice**
- **Workflow review completion notice**

Rules

Action tab—See Defining Actions for Approval Rules for more information.

- The following new fields now appear under the **Use Stop-level parameters** field:
 - **Allow approval/rejection via email**
 - **Email Template**
 - **Send for additional approval** under the **Options available prior to approval** field
 - **Send for additional approval** under the **Options available upon approval** field
- The following new fields now appears under the **Use Route-level parameters** field:
 - **Send for additional approval** under the **Options available prior to approval** field
 - **Send for additional approval** under the **Options available upon approval** field

Routes

Stops tab—The following new fields now appear on this tab unless the route is for all record types:

- **Visit stops in sequence**
- **Custom sequence**

See Route Stops for more information.

2.2 Changes in TeamConnect

This section describes some of the changes that you may see if you are upgrading from an earlier version of TeamConnect to version 4.0.

Users

The following changes may impact TeamConnect users.

Approvals

- **Requests to Approve** page—See Viewing Your Pending Approvals for more information.
 - The **Internal Comments** field no longer appears when you place a check-mark in the check-box of a request. Click **Approve** or **Reject** to enter comments in **Internal Comments**.
 - The **Record** field no longer includes all possible record types that could have a request. You can only select record types for requests you have.
 - The **Days Pending Action** column appears instead of the **Due Date** column if the administrator enables the setting that shows the days remaining instead of date of expiration. If the administrator does not enable this setting, the **Due Date** column appears and not the **Days Pending Action** column.

- The **Record** field includes an **All Records** option instead of a **(Select)** option.
- Pending approvals now expire at the end of the day of expiration instead of the same time as the creation of the request.

Administrators

The following changes may impact TeamConnect administrators.

Email Settings

- The **IMAP Settings** block is now called **TeamConnect Mail Server Settings**. See Setting Up Email for more information.
- The **Email Properties** block is now called **Outgoing Mail Server Settings**.
 - The **SMTP Host Name** field is now called **Outgoing mail server (SMTP)**.
 - The **Use Authentication** field is now called **Outgoing server requires authentication**.
 - The **Use SSL for SMTP** server field is now called **Use SSL/TLS**.

Designers

The following changes may impact TeamConnect designers.

Search Views

Search Views tab—The **Use this search view's results display for workflow approvals** field is now called **Use this search view for workflow approvals** because the results display is no longer the only part of the search view that the page uses. See Accessing the Search View Screen for more information.

3 Upgrade Considerations

This section contains upgrade consideration information for TeamConnect 4.0.

The *Installation Help* lists the versions that you can upgrade to 4.0. If you are running any other version of TeamConnect, you must upgrade to one of the versions listed before upgrading to 4.0.

Important: *Upgrading from version 2.5 SP4 Update 1 or later requires that validation scripts run and that detected issues are resolved before the 4.0 installer runs. For details on these validations, see Upgrade Considerations in the Installation Guide.*

4 Resolved Issues

TeamConnect Enterprise 4.0 includes a large amount of resolved issues since version 3.4 SP1. For a description of each issue fixed, refer to the following 3.4 SP1 updates:

- 3.4 SP1 Update 1—16 resolved issues

- 3.4 SP1 Update 2—14 resolved issues
- 3.4 SP1 Update 3—17 resolved issues
- 3.4 SP1 Update 4—97 resolved issues
- 3.4 SP1 Update 5—11 resolved issues
- 3.4 SP1 Update 6—10 resolved issues
- 3.4 SP1 Update 7—5 resolved issues
- 3.4 SP1 Update 8—16 resolved issues
- 3.4 SP1 Update 9—3 resolved issues

5 Known Issues

The following items are known TeamConnect 4.0 issues and limitations. Each known issue is documented in the following format:

- A description of the issue
- A workaround, if available
- Internal tracking code

Admin Settings

Issue: The message "Cannot connect to the Data Warehouse" is displayed in Admin > Admin Settings > Reporting, even though **teamconnect.properties** is pointing to the correct Data Warehouse, and the Data Warehouse has been installed and initialized.

Workaround: Remove the .jar file.

Tracking code: SUPPORTPRI-4226

Issue: When you export a list of all users, you receive a system error.

Tracking code: INTTEST-3051

Appointments

Issue: On the appointment's calendar, all day events appear on the day of the event and the prior day.

Tracking code: INTTEST-1995

Contacts

Issue: When performing a custom search, the **State/Province** field is not filtering correctly on custom fields.

Tracking code: INTTEST-4469

Issue: If the setting is enabled to automatically populate contact fields when a search returns one result, TeamConnect still returns a search page when searching from a search module.

Tracking code: INTTEST-2255

Expense Entry Tool

Issue: If the **Expensed By** field of the **Expense Entry Tool** uses a drop-down list, your username does not appear in the drop-down list when TeamConnect has over 3,000 users.

Tracking code: INTTEST-1355

Invoices

Issue: In the **Category** field of the **Line Item** table in an invoice, if you have more than 50 characters with no line breaks, the category name cuts off after a certain number of characters.

Tracking code: INTTEST-141

Issue: When you export an invoice search view to Excel, fields with date and money formats do not localize.

Tracking code: INTTEST-4325

Miscellaneous Settings

Issue: When you add a field to the **Misc. Settings** page of the **Setup**, the field does not appear on the **Other Settings** page of the user's **Preferences**.

Tracking code: INTTEST-5147

Workflow

Issue: If you create a temporary reassignment with an End Date that already occurred and no Start Date, TeamConnect incorrectly creates the entry without informing you.

Tracking code: INTTEST-4315

Miscellaneous

Issue: TeamConnect fails to deploy on JBoss 6 due to an unexpected error during load of `javax.transaction.xa.XAResource`.

Tracking code: INTTEST-3412